

# District 62 (D62) Incentive Program Policy

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**Introduction**

This document describes the D62 Incentive Program Policy.

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**Incentive Program Vision**

The D62 Incentive Program must:

- Comply with all Toastmasters International (TI) policies and protocols
  - Benefit and serve the best interests of the D62 Membership
  - Align with achieving the Mission of the District and the District Success Plan
  - Be widely publicized on the D62 web site and through D62 events
  - Focus on continuous improvement
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**Key Roles**

The following are the key roles associated with the Incentive Program Policy.

- Trio (Top 3, includes the District Director (DD), Program Quality Director (PQD), and Club Growth Director (CGD) )
  - Finance Manager (FM)
  - Public Relations Manager (PRM)
  - Bookstore Manager (BKM)
  - District Executive Committee (DEC)
  - Web Administrator (WA)
  - Toastmasters International World Headquarters (WHQ)
  - Incentive Recipient (IR)
  - Club Officers
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**Toastmasters International (TI) Fiscal Year**

The TI fiscal year begins on July 1 and ends on June 30. The Trio for the fiscal year has the accountability and responsibility to establish the Incentives Program for their fiscal year, and ensure that all incentives are properly aligned and accounted for within the D62 budget for that fiscal year. The Incentive Program year will fully align with the TI Fiscal Year.

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**Expiration Date for Incentives**

All incentive Digital Reward Certificates for the current TI fiscal year will expire on June 30 of that fiscal year. The expiration date will be clearly marked on each Digital Reward Certificate that is issued by the assigned Trio Member.

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**Deadline for Incentive Redemption**

All Incentive Reimbursement Requests must be submitted through Concur by no later than July 31 of the following TI fiscal year, or they may not be reimbursed.

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**Eligibility for Participation**

Members must be in good standing of a club current with dues payments at the time of award to earn D62 individual incentives.

Clubs must be current with dues payments at the time of award to earn D62 club incentives.

All D62 Toastmasters who intend to participate in the D62 Incentive Program, and all club officers who will be submitting any Club Incentive reimbursement requests, must contact the D62 Finance Manager at [FM@62toast.com](mailto:FM@62toast.com) to establish an individual D62 Concur User account. This must be done ahead of time (preferably no later than May 31) or it will delay the reimbursement process and may result in missing the deadline to claim the incentive.

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**Digital Reward Certificates (DRC)**

All incentive awards will be issued by the assigned Trio Member as unique Digital Reward Certificates (DRC) via e-mail as follows:

- Individual Incentives - Member email address on record with WHQ
- Club Incentives – Club President email address on record with WHQ

All DRC bear no cash value on their own, and may only be redeemed one time for an eligible qualified purchase (see “Eligible Incentive Reimbursement Requests” section).

All DRC will contain the following information:

- Club (Name and Number) or Individual Member’s Name receiving the incentive
  - Type of Incentive award
  - Dollar amount awarded
  - Unique identification number
  - Date of issuance
  - Names of all the Trio Members
  - Expiration date
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**Excel Tracking Spreadsheet (ETS)**

The assigned Trio Member will maintain an Excel Tracking Spreadsheet (ETS) for each TI fiscal year for tracking all the incentives that have been earned, issued, and redeemed. The ETS will be stored in a leadership secure area in the D62 Zoho Documents, and shared with the FM and DD for reference in processing all Incentive Reimbursement Requests.

- The assigned Trio Member will add a record to the ETS for each DRC that is issued, including: the same information as issued on the unique DRC, the email address of the individual to which the DRC is sent, and name of the assigned Trio Member. By default the status of each DRC will be noted as “unredeemed” when initially issued.
- The FM will update the DRC record on the ETS when each Incentive Reimbursement Request is approved as follows:
  - Name of individual redeeming the DRC; office of individual redeeming the DRC if it is a club incentive
  - Date of redemption
  - Type of Redemption (aligned with eligible purchases), including receipt number and purchase date. If it is a conference rebate, the conference attendee must also be noted.

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**Club Incentives**

Club incentive reimbursements will only be issued to a club officer listed on the official club officer list with WHQ. It is recommended that the Club President, Treasurer, or Secretary submit the Incentive Reimbursement Request on behalf of their club.

The Club Executive Team is responsible for making the decision on how to use any earned Club Incentive(s), and creating a record of the decision. This should be voted on by the Club Executive Team and aligned with serving the best interests of the Club Members. The record of the decision must be included as supplemental documentation for the Incentive Reimbursement Request.

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**Eligible Incentive Reimbursement Requests**

In the spirit of best serving the D62 Membership the following table delineates the eligible purchases qualified for Incentive Reimbursement Requests, and required documentation for redemption. Only purchases that occurred within the TI fiscal year for the incentive award are eligible to be claimed for reimbursement. Multiple purchase types may be submitted on the same Incentive Reimbursement Request if required to reach the total incentive amount.

Type	Required Documentation for Redemption
D62 Bookstore Purchase	<ul style="list-style-type: none"> <li>• DRC being redeemed</li> <li>• Itemized D62 Bookstore receipt (Note: The D62 Bookstore Manager (BKM) will issue itemized receipts for all purchases, including a unique receipt ID number, summary of items purchased, and total price paid.)</li> </ul> <p>Note: D62 Bookstore receipts may not be submitted for multiple incentive reimbursement requests unless the total purchase price exceeds the amount of the DRC. Club members may request the Trio order specific items for the D62 Bookstore in order to save on shipping costs. D62 strives to make orders in excess of \$1000 at a time in order to save on shipping costs.</p>
Toastmasters International Web Site Direct Purchase	<ul style="list-style-type: none"> <li>• DRC being redeemed</li> <li>• Itemized receipt from WHQ</li> </ul> <p>Note: Receipts may not be submitted for multiple incentive reimbursement requests unless the total purchase price exceeds the amount of the DRC.</p>
D62 Spring Conference Registration	<ul style="list-style-type: none"> <li>• DRC being redeemed</li> <li>• D62 Spring Conference Registration receipt issued from D62 web site purchase (Note: The Web Administrator (WA) will issue at time of registration an itemized receipt for all spring conference registrations, including a unique receipt ID number, summary of items purchased, total price paid, and attendee name.)</li> </ul> <p>Note: The Finance Manager is the gate keeper for all conference refunds and rebates from incentives. Members may not submit Incentive Reimbursement Requests for refunded conference registrations.</p>

**Incentive Program Timeline and Steps** These are the key steps in the D62 Incentive Program with associated timing.

<b>Timing</b>	<b>Responsibility</b>	<b>Action</b>
By end of May	Incoming Trio	Evaluate current fiscal year's Incentive Program results as part of process to establish incentives for the next fiscal year. This documented review should include incentives offered, Incentive Program Policy, effectiveness of overall process for disbursement and reimbursement of incentives, effectiveness of incentives to meet Mission of the District, budget available for incentives, and district financial status.
Before DEC Training in June	Incoming Trio	Establish specific Incentives for upcoming fiscal year of responsibility, taking into consideration the budget available for incentives.  Make any necessary updates in the Incentive Program Policy for the upcoming fiscal year.
June	Incoming Trio	Train incoming DEC members on the incentives and the Incentive Program Policy at the DEC Training to help ensure understanding.
July	PRM and WA	Publish the Incentives and Incentive Program Policy on the D62 web site for the current fiscal year once agreed upon by the responsible Trio.
August 1	FM	Change status in the ETS of any unclaimed DRC to EXPIRED for the previous fiscal year.
By end of August	Trio and FM	Account for the planned Incentives in the district budget.
Ongoing during Fiscal Year	D62 Members and Clubs	Earn individual and club incentives. Register as Individual Concur User by deadline. Submit Incentive Reimbursement Requests in Concur by the deadline.
Ongoing during Fiscal Year	Assigned Trio Member	Track incentives earned in the Master Excel Tracking Spreadsheet (ETS). Award incentives via Digital Reward Certificates.
Ongoing during Fiscal Year	FM and DD	Process Incentive Reimbursement Requests in Concur. Keep ETS up to date with redemption status.

## **Incentive Reimbursement Process**

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All incentives will be redeemed via Incentive Reimbursement Requests that are submitted to Concur by individuals or club officers. This ensures the D62 Finance Manager and District Director retain full control and accountability of the disbursement of all D62 funds through the normal D62 Concur expense reimbursement process. This also supports accurate financial records for the district.

The amount reimbursed may not exceed the expense or the value of the Digital Reward Certificate.

Key steps in the reimbursement process are:

- IR submits the Incentive Reimbursement Request in Concur for eligible rebate eligible transaction by the deadline. For club incentive redemptions, supporting documentation indicating how the club has decided to use the funds must also be attached to the Incentive Reimbursement Request.
  - FM reviews and approves the reimbursement request, ensuring that it is allocated to the appropriate area of the D62 Budget prior to approval; logs redemption on the Excel Tracking Spreadsheet as required. For club incentive redemptions, the FM will verify the individual submitting the request is officially on record as a current club officer.
  - DD reviews and approves the reimbursement request
  - WHQ reviews and approves the reimbursement request
  - IR receives payment via electronic funds transfer from WHQ. For club incentives, the club officer receiving the D62 funds transfer is accountable to ensure the funds are further distributed aligned with the club's decision (see "Club Incentives" section).
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**Revision History**

The following information documents at least the last 3 changes to this document, with all the changes listed for the last 6 months.

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<b>Date</b>	<b>Revised By</b>	<b>Changes</b>
1/12/18	Helen Dotson, PQD	Final policy issued for publication on the D62 web page on behalf of the Trio.
1/4/18	Helen Dotson, PQD	Redlined changes to address consistency throughout the document and simplify wording consistent with Trio and FM discussion and alignment.
1/3/18	Helen Dotson, PQD	Accepted redlined changes in the draft to finalize the policy.
1/2/18	Helen Dotson, PQD	This draft includes redlined suggestions from Karen Newhouse, Spencer Van Roekel, Helen Dotson, Stephanie Cantin, and Amy Moored to finalize the policy.
12/18/17	Helen Dotson, PQD	Put Trio at the top of the list of Key Roles per suggestion from Karen Newhouse.
12/16/17	Helen Dotson, PQD	Created policy for review by Trio, FM, and Amy Moored (past District Director), based upon work by the Trio and discussions with the D62 Finance Manager (Karen Newhouse, Spencer Van Roekel, and Stephanie Cantin).