

Standard Operating Procedure

Role: District Vice President

1. Purpose

This document outlines the standard processes and procedures for the District Vice President (VP) of the California/Nevada District Exchange Clubs. Its purpose is to ensure consistency, clarity, and effective execution of the duties assigned to this role, supporting the District Directors, local clubs, and the overall health and growth of the District.

2. Scope

This procedure applies to the individual serving as the elected or appointed District Vice President for the California/Nevada District Exchange Clubs.

3. Core Responsibilities Overview

The District Vice President is primarily responsible for:

- Facilitating communication and support between the District Board and District Directors regarding club activities and needs.
- Encouraging club participation in key District and Regional events.
- Actively participating in leadership development and coordinating training within assigned divisions.
- Lead new member orientations for all clubs (quarterly).

4. Detailed Procedures

4.1. Quarterly Contact with District Directors

- **Objective:** To maintain regular communication with District Directors, stay informed about club activities, identify challenges or needs within their assigned clubs, and offer District-level mentorship.
- **Frequency:** Quarterly.
- **Process:**
 1. **Scheduling:** At the beginning of each quarter (e.g., the first week), the VP will contact each District Director. This can be via phone call, email, or virtual meeting based on mutual preference and effectiveness. Consistency is encouraged.
 2. **Preparation:** Before contacting each Director, the VP should briefly review any previous notes or known issues of that Director's division/clubs. Prepare

key questions, such as:

- What were the key activities or successes in your clubs last month?
 - Are there any upcoming club events needing promotion or support?
 - Are any clubs facing significant challenges (membership, leadership, programs, finances)?
 - Do any clubs require specific resources or support from the District Board?
 - Are there any updates on membership growth or retention efforts?
 - Are there new members who would like new member orientation?
3. **Discussion:** Engage in a supportive conversation focused on understanding the status of the clubs within the Director's purview. Listen actively to their updates and concerns.
 4. **Documentation:** Maintain brief, confidential notes summarizing the key discussion points, action items, and any needs identified for each Director/division.
 5. **Follow-up & Reporting:** Immediately report any significant issues, trends, or requests requiring Board attention to the District President. Share successes or best practices as appropriate during Board meetings or communications.

4.2. Club President Contact for Events

- **Objective:** To personally invite and encourage Club Presidents (and potentially other club officers/members) to attend important District and Regional events, fostering engagement and participation.
- **Key Events:**
 1. District Board Meetings (as appropriate for observers/input)
 2. Region 7 Summits
 3. District Mid-Winter Conference
 4. District Convention
- **Frequency:** Before each scheduled key event.
- **Process:**
 1. **Information Gathering:** Obtain confirmed details for the upcoming event (date, time, location/platform, agenda highlights, registration link/process, deadlines) from the District President, Secretary, or event chairperson.
 2. **Timeline:** Initiate contact approximately 3-4 weeks before the event or as directed by the Board/event timeline. A reminder may be sent 1-2 weeks prior.
 3. **Contact List:** The District Secretary should provide an up-to-date list of all Club Presidents and their preferred contact information (email and phone).
 4. **Communication Method:** The preferred primary method is a personal phone call to each Club President. This allows for a direct, personal invitation, the

ability to answer immediate questions, and the encouragement of attendance following the phone call. If unable to reach the President by phone after reasonable attempts, send a follow-up email. The email provides all necessary written details and links, and serves as a documented reminder. Email may be used more broadly in cases of broad, less critical announcements or simple reminders, but the personal phone call remains the preferred initial touchpoint for significant event invitations.

5. **Message Content:** Craft a welcoming and informative invitation. Include:
 - Precise event details (What, When, Where).
 - The purpose and value of attending (e.g., networking, learning, decision-making, fellowship).
 - Registration information and deadlines.
 - Offer to answer any questions they may have.
6. **Tracking (Optional):** If requested by the Board or event committee, keep a simple log of contacts made or track RSVPs/interest expressed.

4.3. Leadership Training

- **Objective:** To enhance the VP's leadership capabilities and actively contribute to developing leadership skills among club officers and members within the District.
- **Frequency:** Ongoing participation; At least one training session delivered per assigned division per term/year.
- **Process:**
 1. **Personal Development:**
 - Actively seek out and participate in leadership training opportunities offered by the National Exchange Club, Region 7, and the Indiana District.
 - Share key insights or resources learned with the District Board and Directors.
 2. **Divisional Training Delivery:**
 - **Collaboration:** Work closely with the District Director(s) for the division(s) assigned to the VP by the District President.
 - **Needs Assessment:** Consult with the Director(s) to identify the most pertinent training needs for the clubs within that division (e.g., officer roles, membership recruitment, program implementation, running effective meetings, using National resources). Input may also be gathered directly from Club Presidents.
 - **Content & Resources:** Identify and utilize relevant training modules or resources from the National Exchange Club or the Indiana District. Adapt or develop materials as needed to suit the specific audience and topic.
 - **Planning & Scheduling:** Collaboratively plan the training session,

including date, time, location (in-person or virtual), and logistics. Ensure adequate notice is given to the clubs in the division.

- **Promotion:** Work with the Director to promote the training session effectively to ensure good attendance.
- **Delivery:** Co-facilitate the training session with the District Director or support them in their delivery role. Ensure the session is engaging and informative.
- **Evaluation:** Gather feedback from participants to assess the effectiveness of the training and identify areas for improvement for future sessions.
- **Reporting:** Report on the planning and completion of training sessions to the District Board.

5. Reporting

The District Vice President reports directly to the District President. The VP provides regular updates at District Board meetings, summarizing activities related to Director contacts, event promotion, and training initiatives. Urgent matters identified through the Director or Club contacts should be communicated to the District President immediately.

6. Tools and Resources

- Access to current contact lists for District Directors and Club Presidents (maintained by District Secretary).
- District Calendar of Events and Board Meeting Schedule.
- Email account and communication tools.
- Access to National Exchange Club and District training materials/resources.
- Budget for communication or training expenses, if applicable and approved.

7. Review and Updates

This Standard Operating Procedure will be reviewed annually by the outgoing District Vice President, incoming District Vice President, and the District President, or as needed, based on changes in District structure or priorities. The District Board will approve updates.