



# District President Workbook

(as adapted from Chapter President Workbook)

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# The District Officers

The officers of the District shall be the president; executive vice president; such number of vice presidents or other officers as deemed necessary to carry on the business of the District; secretary; treasurer; and immediate past president.

## What the District President does

The District president is, in essence, the District chief executive officer who is responsible for leading and ensuring the District carries out its mission. The Barbershop Harmony Society relies on the District President as one of the primary contacts and communication links between the Society and District and Chapter.

The District president is:

- An active, voting (in cases of a tie), District board member
- The head of the District leadership team
- Responsible for the planning and chair at all District board meetings and presides over House of Delegates Meeting.
- Accountable for directing the establishment of the District's Mission Statement, and supporting the goals and objectives to ensure consistency with the organization's objectives and purpose.
- Knowledgeable of the ongoing duties and progress of **ALL** Board members
- Responsible for appointing committee chairs and committees as the Standard District Bylaws and District rules, regulations and policy calls for.
- A member of all committees and teams of the District (**except** for the Nominating Committee)
- Accountable for following up with each Board member to ensure that all projects, goals and initiatives within that officer's portfolio are being "worked" and will meet the agreed upon deadlines (use After Action Report)
- Responsible for evaluating the performance of the leadership team and take steps to correct any noted weaknesses.
- Charged with the responsibility (along with the board) to assess progress of the District's annual plan and budget progress during the year and **revise the plan as necessary**, and ensure that all necessary forms are filed and monies correctly disbursed.
- An active member of the District President's Council (DPC)
- Responsible for attending any scheduled training or education related to District administration and advancement.
- Familiar with the Chapter President's Responsibilities
- Familiar with District Bylaws, S.O.P. and any other related materials

- Takes action on “After Action Report”

## What the District Secretary does

The District secretary is, in essence, a District business manager who keeps the District organized and current in correspondence, report filing and all paperwork related to the operations of the District. The Society also relies on the District secretary as a primary contact & communication link between the Society and District.

The District secretary:

- Is an active, voting, District board member
- Maintains accurate roster records **independent** of Society records.
- Reports new District officers & leaders by updating their District [Member Center](#) profile.
- Is responsible for ensuring through the [Member Center](#) that all officer’s information is current and accurate.
- Establishes an “After Action Report” to be utilized by the president between meetings
- Reports District filings, in cooperation with District Treasurer in District [Member Center](#) profile.
- Takes all meeting minutes, including any special or non-scheduled board meetings and annual District meetings at which election of officers takes place, etc.
- Maintains District Calendar to include all Chapter Shows, Conventions and special events.
- When needed, orders District supplies.
- Maintains District legal files including:
  - Standard District Bylaws
  - District rules & regulations (if necessary)
  - Original District License & Charter
  - State or Provincial incorporation documents.
- Attends the District Leadership Academy

## What the District Treasurer does

The treasurer holds the District funds in trust. It is his responsibility to keep accurate financial records and to offer sound financial advice to the District board. The treasurer should be organized, detail-minded and have a rudimentary knowledge of bookkeeping practices.

The treasurer must keep up-to-date records, in clearly understandable form, of all income and expenditures. He should collaborate with the District secretary, officers and District committee members in the collection of all money. In addition, he should indicate on his records, under various classifications, who, what, where, when, why and how money is used.

The main duties of the treasurer are to:

- Function as an active, voting, District board member
- Prepare, in conjunction with the president & the other officers, an anticipated District income and expense budget for the year.
- Keep an accurate set of financial records.
- Pay all bills promptly on receipt of billing
- Prepare monthly reports of cash receipts and disbursements.
- Prepare and file on behalf of the District governmental, regulatory and tax returns and forms.
- Present financial records to the District financial review committee for annual review as required by the Society.
- Submit treasurer's report to District board, usually at each board meeting (or as requested).
- Offer advice and make recommendations to the board regarding financial matters.
- Perform such other financial assistance to the District as required.
- Attend the District Leadership Academy

## **What the District Executive Vice President does**

In the absence of the president, the executive vice president shall preside at Board meetings. The executive vice president shall perform other duties as assigned by the president or by the Board and shall assist the president and the Board in carrying out the policies and the objectives of the District.

The Executive Vice President:

- Work closely with the District President
- Knows **all** duties of the District President
- Is familiar with District Bylaws, S.O.P. and other related materials. Acts as the “go-to person” when questions arise about policy, bylaws and S.O.P.
- Serves and is part of the District President’s Council (DPC)
- Makes the President look good!

## **What the Immediate Past President does**

The retiring president automatically shall become the immediate past president and shall hold office for a term of one year, or until a new president is elected. The immediate past president shall be a member of the Board during their term of office. A president who resigns or is removed during their term of office is not eligible to become the immediate past president. The immediate past president shall perform other duties as assigned by the president or by the Board and shall assist the president and the Board in carrying out the policies and the objectives of the District.

# Board Meeting Basics

## Quorum

The BHS Standard District Bylaws states that at a Board of Directors meeting a simple majority (greater than 50%) is required to constitute a quorum. A meeting of the House of Delegates only requires 30% of the members to constitute a quorum.

## Meeting Agendas

It is crucial that each meeting of the District board of directors has an agenda. It is the responsibility of the District president, in cooperation with the District secretary, to prepare and distribute an agenda *at least two(2) weeks* in advance of the **BOD** meeting to prepare board members for items to be discussed.

In the case of the **HOD** Meeting, notice should be given at least forty five (45) days in advance of the meeting.

To expedite the running of the meeting there is an expectation that all reports from functional vice-presidents and standing and special committee chairmen will be in writing and will be distributed at least thirty days (30) in advance of the meeting. This will allow all BOD members and HOD Delegates ample time to review the material prior to the meeting and will bypass the need for oral reports.

The written reports become a part of the permanent record (minutes) of the meeting. The written reports are filed with the District secretary and shared with other members of the board of directors well ahead of the meeting (30 days). Minor amplification of each written report is to be expected, but **should be kept to a minimum. Do not allow oral reports.**

## Robert's Rule of Order

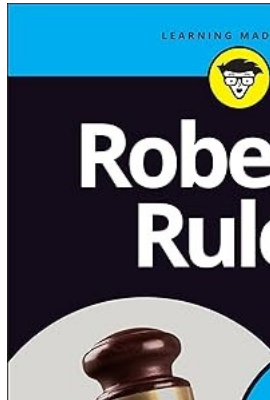
The Barbershop Harmony Society Standard District Bylaws state that the governing rules and basis for facilitating meetings is "Robert's Rules of Order"

At its most basic, it prevents individuals or groups of people from dominating a floor or topic of conversation but also permits equal opportunities for effective decision making as an entity.

Suggested reading is "Robert's Rules for Dummies"

- Found on Amazon
- Paperback

- \$15.99
- 528 pages



## Motions

Actions passed by the board of directors, especially those dealing with District money expenditures, should be done through a motion.

District secretaries should record who makes the motion as well as who 2nds the motion.

Motions should be conducted through a vote by voice, hands, ballot or roll call.

Except for a roll call vote (which should be recorded with names), it is only necessary to record the results of the vote in the minutes.

If a minority voter requests that they be so noted, their request needs to be recorded in the minutes.

The passed motion should be noted in the minutes. Voting ties are broken by the Chair's (District president) vote.

Example:

Motion is made (Secretary records by whom)

Motion is 2nd-ed (Secretary records by whom). The president states the motion on the floor.

NO Second?? - Motion is dropped

If seconded, President opens floor for discussion moderated by the President

How long? TBD but shouldn't allow one person to address topic more than twice

Motion can be amended or rescinded.

The president makes sure to stay on topic!

The **president** calls for the question

Vote - Controlled by the president.

The president restates the question or may ask the secretary to restate the question.

Voice- Yay or Nay

Hands (preferred) - all in favor, all opposed

Roll Call - conducted by district secretary

Ballot - conducted and tabulated by district secretary.

Abstentions -recorded by district secretary

Only abstain for valid reasons (conflict of interest), not just to avoid voting.

Results are clearly stated by the president and recorded by the district secretary.

Can be tabled to another time (meeting) without taking a vote

One motion at a time. Must be resolved or tabled before any other motion is made.

## Meeting Minutes

The District secretary records the minutes at all District board meetings to provide a complete and accurate record for the District. The secretary should promptly send a copy of the minutes to the District president to alert him of unfinished business and to get confirmation of its accuracy. Once approved by the board at a subsequent meeting, he retains these minutes as part of the District's permanent record in the District Legal File. If the District secretary is unable to attend a meeting, he should arrange for someone else to record the minutes. A template is available on the Society online [Document Center](#). Additional information about meeting minutes can be found in the BHS District Secretary Manual.

## Basic Tips & Guidance

“Leadership is the ability to influence the thinking and behavior of others... and to direct them toward the specific goal “

“Effective Leadership is adapting *your* behavior to the performance needs of the individual or group”

### Lead – You are in charge...act like it

- Right or Wrong - LEAD (A few Good Men)
- Make a decision
  - people want to be lead
  - not able to satisfy everyone
- Be accountable (Flight)
- Paralysis through procrastination
  - don't allow yourself to become wishy-washy
- Hold **others** accountable (General Patton), (Everybody)
  - Establish high expectations
  - Gain commitment

- Follow progress and results
- Provide feedback and consequences

## Communicate

- Distinguish between effective and ineffective communications
- Recognize how different social (interpersonal) styles impact communications
- Example of Ineffective Communication (YU)

<b>Words</b>	<b>What You Say</b> Word Choice, phrasing, filler words, etc.	<b>9%</b> of the Message
<b>Voice</b>	<b>The way you say it</b> Tone, volume, pitch, speed, etc.	<b>41%</b> of the Message
<b>Body</b>	<b>How you look when saying it</b> Eye contact, posture, gestures, proximity, facial expression, etc.	<b>50%</b> of the Message

- Effective Communication requires:
  - Knowing yourself
  - Knowing your target audience/individual
    - Selecting the most appropriate information and approach
    - Planning what, how, and when to deliver the message.

## Other Points

- Write things down – always carry a note pad
- Read emails EVERYDAY
- Return emails/phone calls within 24 hrs
- Be careful of overextending yourself
- To Be Continued...

## Volunteers

**Generally, there are four types of people:**

### **5% Leaders:**

*Proactive, visionaries, makes change happen*

### **25% Responsible:**

*Gets things done, with leadership*

### **50% Responsive:**

*Prod them to get a job completed*

### **20% Inert:**

*Complainers, non-participators, unreliable*

Spend your time and energy enrolling the **top 80%** in the Mission & Vision of your organization.

**Don't get sidetracked** by the inert 20%

### **Why Do People Volunteer?**

- Someone asked me
- Belief in the leader or a key official
- Business or professional growth
- Personal recognition
- Opportunity to give back
- Enjoy seeing things done well
- Enjoy being a leader
- To be in the know
- To keep an eye on the leaders

### **The Needs of a Volunteer**

- A volunteer needs a specific manageable task with a beginning and an end
- A volunteer needs a task that matches interests and reasons for volunteering (round pegs in round holes)
- A volunteer needs a reasonable deadline for completing the task
- A volunteer needs the freedom to complete the task when and where it is most convenient for the volunteer
- A volunteer needs adequate training
- A volunteer needs a safe, comfortable, and friendly working environment
- A volunteer needs follow-up to see that the task is completed
- A volunteer needs **appreciation, recognition, and rewards that match the reasons for volunteering**

### **Recruiting a Volunteer**

- Be genuine – sincerity works
- **Match** position with interests and/or capabilities
- Provide accurate, clear responsibilities description
- Don't minimize time requirements
- Explain they would be good in the job