

**ZONTA**



**INTERNATIONAL**

## **District 4**

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**Southern Ontario, Canada**

**Western New York, USA**

**Western Pennsylvania, USA**

## **Area Director's Manual**

September 2003

**ZONTA INTERNATIONAL  
DISTRICT 4**

**AREA DIRECTOR'S Manual**

**Property of**

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September 2003

*A worldwide service organization of executives in business and the professions working  
together to advance  
the status of women. . .*

## Preface

This manual was adopted during the 2002-2004 biennium, under the leadership of Governor Anna Parenti Conn, for the benefit of the area directors of District 4. Any duties, responsibilities, or statements in conflict with official Zonta International manuals or policies are unintentional. In all cases of a conflict of statements, the official Zonta International documents supersede the District 4 Area Director's Manual.

The appendix contains the forms to be used for all district reports. Revisions may be made and approved by the District Board. These forms are also available on the District 4 web site: <http://www.zontadistrict4.bfn.org>.

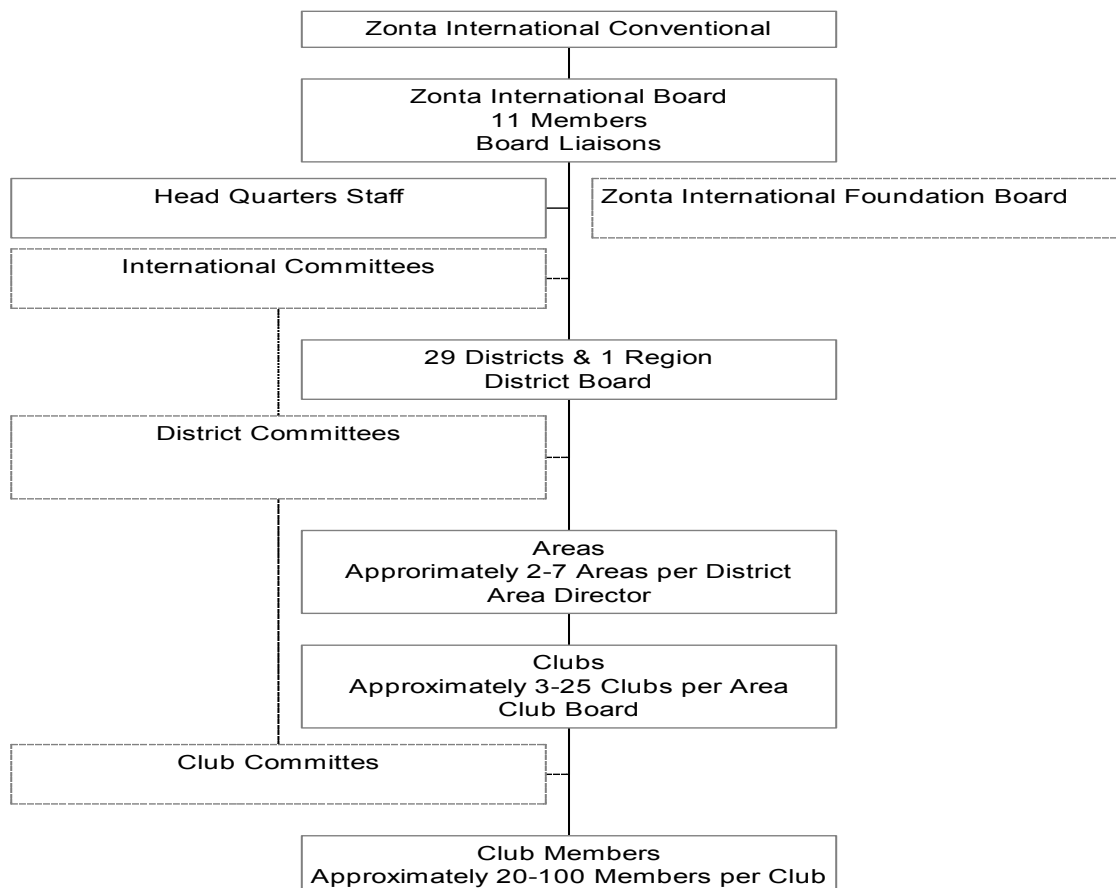
Parts of this manual have been taken from *The Zonta Club Manual (February 2003)*. Zonta International manuals should be consulted for the full text of those parts or for further information.

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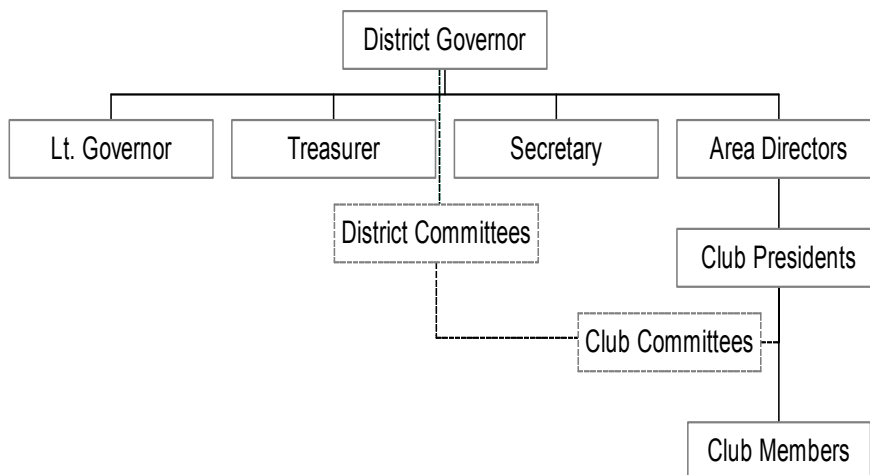
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# ZONTA INTERNATIONAL



## DISTRICT 4



## AREA DIRECTOR

### 1. Function

- a) To serve as a liaison between the district board and local area clubs
- b) To administer the affairs of a specific area within the district and
- c) Support the policies and programs of Zonta International at all levels.

### 2. Qualifications

- a) Be actively engaged in a classification and
- b) Have served at least two years in an elected club office and/or have been a district committee chairman and
- c) Have served at least one year as a club president and
- d) Be a member of one of the clubs in the area.

### 3. Responsibilities

1. Acts as a liaison between the clubs in the designated area and the district board
  - a. Maintains contact with club presidents and supports clubs
  - b. Keeps the district informed about the clubs in the assigned area:
    - i. Presents a report of area's activities
    - ii. Presents area clubs' issues and concerns and
    - iii. Participates in formulating policies and procedures for the district within the guidelines of Zonta International.
  - c. Visits established clubs in the area annually
  - d. Communicates with area clubs
    - i. Through an area director's newsletter (minimally twice a year) and
    - ii. By notes, telephone calls, email and other means appropriate
    - iii. Receives and reviews the Club Annual Report from assigned clubs and submits an annual report to the governor by May 15<sup>th</sup>.
  - e. Is a member of the District Membership Committee
  - f. Mentors and looks for future candidates for area, district and international officers
  - g. Determines club awards to be presented at the district conference in the areas of public relations, newsletters, service and membership (see number 8).
2. New Clubs
  - a. Visits new clubs in the assigned area within ninety days of the club's chartering. Thereafter, visits at least once (preferable twice) a year.
  - b. Reviews with the governor and the chairperson of the sponsoring Organizing and Mentoring Committee the club minutes and board meetings minutes for each new club during its first year.
3. Clubs of Concern
  - a. Stays informed about and advises the district of clubs with low membership, internal conflicts or other problems
  - b. Works with the district to assist clubs in resolving problems
  - c. Is notified by a club that intends to disband and works with the club to avoid disbandment.

4. Plans and conducts Area President's Meeting
  - a. Organizes and conducts an area president's meeting at least twice yearly (once mid-September to mid-October and again in February-March)
  - b. Invites the governor (or her designate) and other board committee chair people to attend area meetings
  - c. Ensures that the presidents have a copy of the District 4 President's Guidelines, The Zonta Club Manual, Protocol Manual and Zonta International Bylaws.
5. Plans and Conducts Spring Workshops
  - a. Conducts spring workshops in conjunction with another area director.
  - b. District 4 holds three spring workshops annually.
6. Voting Member of the District Board
  - a. Attends and votes at meetings of the district board and
  - b. Represents the designated area clubs' interest to the district board and informs clubs of the outcomes of district board meetings and conferences and
  - c. Attends, participates in, and votes at the District 4 Conference.
7. Other Duties

May be assigned other duties by the governor and/or district board.
8. Awards

Area directors are asked to present the following awards based on her assessment of the following criteria to clubs in their assigned area.

  - a. Public Relations:
    - i. Press releases and/or public service announcements
    - ii. Community involvement
    - iii. Public relations material
    - iv. High profile
    - v. Website.
  - b. Newsletter
    - i. Distribution (club members, lieutenant governor, governor and district archivist)
    - ii. Content (club, district, Zonta International)
    - iii. Appearance
    - iv. Frequency of publication.
  - c. Status of Women/Service:
    - i. Hands on
    - ii. Monetary
    - iii. YWPA Award
    - iv. ZISVAW program or grant
    - v. Amelia Earhart program or award
    - vi. Jane Klausman Award
    - vii. Z Club and/or Golden Z Club.



- d. Membership, Organization and Extension:
  - i. Increase in membership
  - ii. Efforts to acquire new members
  - iii. Efforts to sponsor, organize and/or mentor a new club
  - iv. Mentor a club in danger of losing their charter.

#### 4. Tools and Supplies

- e. Provided by the District:
  - i. Updates/changes to the District 4 Area Director's Handbook
  - ii. District 4 Letterhead
  - iii. District 4 Envelopes
  - iv. District 4 Expense Reimbursement Form (See Appendix, p. 23)
  - v. District 4 Gifts-in-Kind Form (See Appendix, p. 24)
  - vi. District 4 Report forms (See Appendices for Area Director Club Visit Report, Club Annual Report, Area Director Annual Report, etc., pp. 25-35).
- f. Previous Area Director furnishes
  - i. All records and reports from previous biennium(s).

#### 5. Reimbursement Guidelines

- a. Vouchers
  - i. Expense vouchers must be itemized with receipts attached.
  - ii. A request for advances or for reimbursement by an area director must be submitted by voucher to the governor for approval, before the treasurer disburses funds.
  - iii. Vouchers should be submitted within ninety days after the expense is incurred.
  - iv. All expenses should be submitted by May 15 to facilitate closing the books on May 31.
- b) Reimbursable Expenses
  - i. Reimbursable expenses shall include travel to board meetings and club visits as per IRS guidelines.
  - ii. Conference registration and hotel rooms (1/2 of double occupancy) will be paid by the district conference funds.
  - iii. If accommodation is necessary for an area director when visiting a club, the host club is responsible.

**MOST IMPORTANT: HAVE FUN! ENJOY!**

**ASK FOR HELP WHEN YOU NEED IT!**

## **PRESIDENT'S MEETINGS**

### **1. Purpose**

- a) To provide training for club officers
- b) To share information
- c) To answer questions
- d) To meet with each other
- e) To develop common goals.

### **2. Content**

- a) Role of the club president
- b) Role of the area director
- c) Goals of the district
- d) Organization and extension update
- e) Membership
- f) Inter-city meetings
- g) Area director visits
- h) News of the area
- i) News of district board meetings
- j) News of international convention (in convention years)
- k) Training of officers
- l) Expectations of area director (deadlines, reports, etc.)
  - 1) Tips for new presidents and other leaders
  - 2) Review of President's Guidelines and ZI Club Manual
  - 3) Discussion of topics of concern to presidents
  - 4) Questions and answers
- m) Calendar of upcoming Zonta events.

## NEWSLETTERS

### 1. Timing

Newsletters are to be written throughout the year. Ideally, they should be spaced so that international, district, and area publications are alternated and that members will receive one communication each month. Suggestions for months to send area newsletters and for the contents are:

- August/September:**
- To encourage conference attendance
  - Information from May/June district board meeting
  - To request any information you need or want for conference
  - Recap news of international convention in appropriate years
- December/January:**
- To recap important issue of district conference
  - Information from fall district board meeting
  - To encourage spring workshop attendance
- March/April:**
- Reminder of spring workshop and any information you need or would like members to bring
  - Reminder to complete and send the Club Annual Report to the area director
  - Information from February district board meeting
- May/June:**
- Information about president's meetings
  - Review of spring workshop
  - Welcome new presidents and thank out-going presidents
  - To motivate presidents to make plans for the year
  - To encourage conference or convention attendance..

### 2. Mailing List

Newsletters should be sent to:

- a) All club presidents in your area
- b) District governor, lieutenant governor, treasurer, secretary and parliamentarian
- c) All district area directors
- d) Post on district website and notify ECP's.

## CLUB VISITS

### 1. Schedule

Each club **must** be visited once annually. Some clubs may need additional visits if they are experiencing problems. If a club does not extend an invitation, it is the area director's responsibility to arrange a club visit.

### 2. Program

The area director's visit should be scheduled for a regular business meeting. The area director should present the program; the subject should be meaningful to Zonta. The club president may be asked if there is something special for the area director to address, a problem or a topic of particular interest.

### 3. Report

Use the Area Director Club Visit Report to request information from the club (see Appendix, p. 25). The area director may interview the president while visiting the club or ask the president to fill out the form and return it later. The area director must send the completed report to the governor along with the expense voucher. The area director should retain a copy of the report to use when completing the Area Director Annual Report (see Appendix, p. 30).

### 4. Financial Responsibility

The club is responsible for the area director's meal. Mileage is paid by the district according to IRS guidelines. While area directors may attend other club and inter-city meetings, only the annual club visits or other club visits authorized by the governor will be reimbursed by the district.

### 5. Follow Up

A note of thanks and any follow-up comments should be sent to the club and its president after the visit.

## CLUB INSTALLATION CEREMONIES

### 1. Zonta Symbols

- a) Zonta's colors are mahogany and gold.
- b) Zonta's flower is the yellow rose.
- c) Zonta's membership pin is a symbol of our bond in Zonta. The Zonta pin is generally worn on the left side. The president wears the gavel pointing up while serving, and pointing down after completion of the term.

### 2. Induction of New Members

#### President:

The members of the Zonta Club of (name) are honored that you want to join with us in service and fellowship. We welcome you to a worldwide service organization of executives in business and the professions working together to advance the status of women.

The name of Zonta is derived from a Sioux Indian word meaning honest and trustworthy. Zonta International, a classified service organization of executives and professionals, is pledged to promote the objects of Zonta, which are:

- a) To provide service at the global level;
- b) To improve the legal, political, economic, educational, health and professional status of women;
- c) To work for the advancement of understanding, goodwill and peace through a world of fellowship of executives in business and the professions;
- d) To promote justice and universal respect for human rights and fundamental freedoms;
- e) To be united internationally to foster high ethical standards, to implement service programs and to provide mutual support and fellowship for members who serve their communities, their nations and the universe.

Membership in Zonta is an honor and a privilege. It is also a responsibility. Regular attendance and participation in club service projects is expected by all members. If called upon for leadership responsibilities, you are expected to serve enthusiastically. Zonta is strongly committed to the ideal of equality for all as expressed in the United Nations Universal Declaration on Human Rights. We are confident you will contribute your caring, enthusiasm and talents to our club.

*(The Organization, Membership and Classification Committee chairman may take this opportunity to introduce each new member with a short biographical sketch, which includes name, classification, business title and other pertinent information.)*

**President:**

Will you repeat the Zonta pledge with me: “I pledge myself to uphold and practice the ideals of Zonta.”

**New Member(s):**

I pledge myself to uphold and practice the ideals of Zonta.

**President:**

Members of the Zonta Club of (name), do you receive (name/s of new members) as (a) member(s) of this club and promise to work together to further the ideals of Zonta International?

**Membership:**

We do.

**President (speaking to the new member/s):**

The fellowship of Zonta welcomes you. We ask your support in joining with Zontians worldwide in carrying out the service work of Zonta.

Note: The pin (if not previously given), a yellow rose or other token may be presented to the new members at this time.

**3. Installation of Club Officers and Board of Directors**

**Installing Officer:**

The Zonta Club of (Club Name) has completed another year of service to the community and to the world. We are all proud of these accomplishments and turn now to the year ahead. Will the officers and Directors of the club for the coming year please come forward? *(The new board assembles.)*

Directors of the club, (names of club directors), your duties are many and they are important. You will actively participate in all board meetings. It is important that you attend them regularly and that you all be punctual in doing so. All matters presented at these board meetings are to be carefully and seriously considered. Board decisions are to be made on the merit of the question with consideration for the benefit of the entire membership. You have been elected to an honorable and responsible position. Your work will reflect upon this club, this club’s relationship to the community, to the district and to Zonta International. Do you accept this responsibility? If so, please say “I do.”

**New Directors:**

I do.

**Installing Officer:**

Will the Secretary, *(name)* please step forward. It shall be your duty as secretary to keep a complete record of the proceedings of all meetings of this club and to keep an up-to-date list of the club membership. You will be expected to furnish pertinent information to committees upon request and will serve as the custodian of all club records, except the treasurer's. You will also be responsible for such correspondence as may be required for the smooth operation of the club. Do you so pledge?

**New Secretary:**

I do.

Note: If the club has both a recording and a corresponding secretary, install the corresponding secretary first and then the recording secretary. Comment on their specific duties.

**Installing Officer:**

Will the Treasurer, *(name)*, please step forward. It is your duty as treasurer to have custody of all funds, to make monthly reports to the board of directors and to make an annual financial report to the club at its annual meeting. Additionally, it is your responsibility to make a timely payment of dues to Zonta International and to the district and to perform such other duties as may pertain to the finances of the club. Do you so pledge?

**New Treasurer:**

I do.

**Installing Officer:**

Will the Vice President, *(name)*, please step forward. Your duties are special, for they are designated by the president. In addition, in case of the inability of the president to perform the responsibility of office, it is your duty to preside and carry on the administrative obligations of the president. Do you so pledge?

**New Vice President:**

I do.

**Installing Officer:** *(if the club has a president-elect)*

Will the President-Elect, *(name of the president-elect)*, please step forward. Your duties are to assist the president and to plan for the future of the club, especially in the areas of growth and community involvement. It is understood that you will succeed the incoming president when the current term of office is completed. If you pledge to fulfill these responsibilities, please say, "I do."

**New President-Elect:**

I do.

**Installing Officer:**

*(Name of incoming president)* has been elected to lead this club as its president. Will you please step forward. It is your duty to preside at all meetings of the club and board of directors in a manner protecting the rights of each member, to administer the matters of the club in a proper manner, exercising good judgment, and to provide leadership to the Zonta Club of *(club name)*. If you pledge to fulfill these responsibilities, please say, "I do."

**New President:**

I do.

**Installing Officer: (optional)**

In presenting you with this gavel, I also give to you the responsibilities and privileges of the office of president. In presenting you with this president's pin, I also give you a tangible symbol of your commitment to the Zonta Club of *(club name)* and Zonta International.

**Installing Officer:**

Members of the Zonta Club of *(club name)*, do you pledge yourselves to cooperate with these newly installed officers? If so please say, "We do."

**All Club Members:**

We do.

**Installing Officer:**

Congratulations and best wishes to you, officers and members.

Note:

- Many clubs present a Zonta gift, a Zonta Rose or other token of appreciation to each new office as that person takes the pledge of office.
- The Installation Ceremony is often performed by a district officer, but may also be performed by a former club president or a Zonta International representative.



### 3. Candlelight Ceremony

#### Area Director to Club President:

I light this candle with the flame that has been passed from our president to our district governor and then to me in the spirit of Zonta International;

I wish for you as president, the wisdom of applying your knowledge and experience to your roll as president.

I wish for you the courage of doing what is right, of always taking the high road and meeting challenges face on.

I wish for you the faith in your fellow Zontians, the organization and the goals for which we strive.

And finally, I wish for you as president, the flame of enthusiasm to constantly live within you and that this flame excites you to continue your leadership in the spirit of optimism for the future.

This candle will serve as the *(club name)* ceremonial candle and will continue to light the way for Zontians in this club and in this community.

#### Club President to New Zontians:

I light this candle with a flame that has been passed, in the spirit of Zonta, from our international president through our district and then to our club.

The red center of the flame represents the flash of radiance, which forms the essence of our emblem. It represents the passion and vision of those Zontians and great women who went before us, in whose footsteps we follow as they made a better world for those who came after.

The orange flicker stands for the symbol of inspiration – the heart of our Zonta emblem. It signifies the creativity and innovation of the women who founded the Confederation of Zonta Clubs in 1919.

The golden periphery of the flame embodies the richness of knowledge, experience and wisdom of the Zontians in this room and our sisters around the world who share our common goals – improving the world for women through community service and global understanding.

And finally – the candle itself, which is made of wax: a soft pliable substance capable of assuming any shape – it hardens into a usable and beautiful tool designed to change our world. The candle itself characterizes the strength of our organization, flexible and pliable as we develop and grow and once formed; powerful enough to shed light into the dark corners of ignorance, inequality and injustice.

I ask you to light your candle every March 8<sup>th</sup> to honor Status of Woman Day; to remember those women who have helped us change our world. Light this candle in thanks and celebration of those brave women of the past, present and future who have dared and continue to dare to go forward despite the shadows of those around them.

**Club President to Members:**

I light these candles in the spirit of Zonta sisterhood. As I light your candles, one by one, think of all those great women whose words and actions motivated, inspired and brought tears and laughter into our lives; those women who have touched our very souls.

This candle has been lit by a candle, which was lit by our district governor's candle, which was the first candle in the Zonta world to start this ceremony, and lit by our international president during the International Year of the Volunteers.

We light these candles for sisterhood as we join together in friendship and a common purpose.

The light fills this room and these hearts with the flame of respect and honor for those courageous women who soared higher and dreamed greater than their world accepted.

I invite you to light this candle on March 8<sup>th</sup> to remember our founders whose vision, energy and leadership initiated the founding of Zonta in 1919.

I invite you to light this candle on International Status of Women's Day to honor those sister Zontians in our club and throughout the world; those Zontians who serve their community and make a difference to humanity.

I invite you to light this candle in hope of those women who will come after us, who will build on our efforts and take Zonta towards the future and even greater successes; those women who will light their candles from the same one we did tonight.

## DISTRICT 4 BOARD MEETINGS

### 1. Schedule

a) The first meeting a new area director is required to attend is the district board meeting that includes incoming and outgoing board members. It is one of the most important meetings for the incoming board as it gives them an opportunity to become acquainted with each other and to discuss their duties and responsibilities.

a) Board meetings are usually held three times a year:

- May or June
- October or November (in conference years, immediately following the close of the conference)
- January or February (internet chat).

### 2. Procedure

a) Prior to the meeting the governor sends out the agenda, meeting location, maps and other necessary information and instructions.

b) The governor or her designee is responsible for making the reservations.

c) Area directors are to bring a report summarizing their activities in their area. The report should include, but need not be limited to:

- Information about club visits
- Inter-city meetings
- Other concerns or events in their area.

b) Copies are to be provided for each board member and officer, including committee chairs.

## **DISTRICT 4 CONFERENCE**

### **1. District Board Meeting**

The Board meets immediately after adjournment on Sunday. The Sunday meeting is usually short; its purpose is to critique the conference or seminar with the international representative and the conference chairmen. Other items may be discussed according to the governor's agenda.

### **2. Reservations**

Reservations, including hotel, are handled by the area director. The area director sends a registration form and then submits reimbursable expenses to the governor for approval.

### **3. Expenses**

Conference registration and hotel rooms (1/2 double occupancy) are paid by the district. Meals are not included and are the responsibility of individual board members.

### **4. Area Reports for Conference Program Book**

Each area director will prepare an area report for the program book as directed by the governor.

### **5. Awards**

The area director will have chosen which clubs in her area that are to receive awards in the categories of Public Relations, Newsletter, Status of Women/Service, and Membership. Certificates and any other awards are provided by the governor. The area director will present the awards at the banquet on Saturday evening during the district conference.

### **7. Special Assignments**

The governor may ask an area director to present or be responsible for some part of the conference or seminar program.

### **8. Seating**

Seating arrangements for each business session of the conference are determined by the governor.

## SPRING WORKSHOP

### 1. District Manual

The *Zonta International District Manual* Chapter 6, “Area Meetings,” includes information about spring workshops. Refer to the District Manual for the full explanation and discussion.

*“Area Meetings are held to promote the Objects and programs of Zonta International. They are essentially planning and training seminars intended to provide instruction on club procedure and discussion of club activities. . . . Programs should be arranged to offer practical suggestions and assistance to the clubs in planning their own programs and carrying out their own projects.*

*Area Meetings are one-day events, usually conducted on a Saturday with a group luncheon. They must be held at least once a year in each area preferably in the months of March, April or May. These meetings are planned by the Area Director, who is the presiding officer, . . . with the assistance of . . . a host club, with the agenda being planned by the District Board.*

*Area Meetings are fully supported through a registration fee. This fee does not include the travel expense of the Area Director and the District representative who should be either the Governor or the Governor’s designate. Their travel expenses will be paid by the District upon submission of expense vouchers. Overnight accommodations for members attending the meeting are also not part of the registration fee.*

*The host club is responsible, upon request of the Area Director, for securing a venue for the meeting, meals, registration and suitable overnight accommodations for those members who may need them.*

*The Area Director prepares a report for the District Board at the conclusion of each area meeting.”<sup>3</sup>*

### 2. Area Director’s Responsibilities

- a) Set date and host club in cooperation with the governor following the district agenda developed at the Joint Board Meeting (confirm governor’s availability prior to setting a firm date).
- b) Meet with the host club
  - 1) View the facility
  - 2) Check for necessary equipment
  - 3) Establish a registration fee
  - 4) Assist with the budget preparation
- c) Prepare
  - 1) Agenda
  - 2) Obtain the speaker or speakers
  - 3) Other necessary materials and handouts
  - 4) An evaluation form Zonta International District Manual, page 29. (12/91)

- d) Provide the following information to the governor so the call to the spring workshops can be prepared:
- 1) Date
  - 2) Location
  - 3) Name of host club and contact information
  - 4) Agenda
  - 5) Program information (workshops, speakers, etc.)
  - 6) Registration information and registration chairperson
  - 7) Registration fee
- e) Inform host club of overnight lodging needs, if any
- f) Prepares a report on the meeting and sends to the governor
- g) Additional Suggestions:
- 1) The host club may wish to present non-Zontian presenters and speakers with a small gift. This may be considered as part of the workshop expenses.
  - 2) A recorder should be appointed to take notes at the workshop, write a report, and send to the area director within two (2) weeks. The area director will need this information for her workshop report (see Appendix, p. 36, for report form).
  - 3) The evaluation forms are valuable in preparing the report to the governor and for planning the following year's workshop agenda (see Appendix, p. 35, for a sample evaluation form).
  - 4) When the area director receives the financial report from the host club a copy **must** be forwarded to the governor and district treasurer within **30 days**.
  - 5) The area director should write a thank-you note to the host club and its chairmen, governor, lt. governor or the governor's designee, speakers, and presenters after the workshop.
  - 6) The host club should not purchase or provide anything that will cause undue expense without first conferring with the area director. The proposal should include full information as to cost before it is committed as a workshop expenditure.

### **3. Host Club Responsibilities**

- a) Arranges for:
- 1) Meeting place
  - 2) Meeting rooms and seating arrangements
  - 3) Equipment including slide and overhead projectors, microphones and lecterns or podium
- b) Prepares a budget in cooperation with the area director which includes:
- 1) Costs of facility and equipment rental
  - 2) Meal costs including tax and gratuity
  - 3) Printing costs for the program and other materials
- c) Appoints a:
- 1) Finance chairman
  - 2) Registration chairman
- d) Provides information for the call to spring workshop

- e) Arranges for:
  - 1) Registration table
  - 2) Hospitality table or room the evening preceding the workshop
  - 3) Host club president's welcoming remarks
  - 4) Any other special program items
  - 5) Hotel lodging for the area director and any other district officers as necessary
  - 6) Zonta store
- f) Keeps the financial records of the spring workshop
  - 1) Submits a financial report to the area director within **30 days** following the area meeting (see Appendix, p. 35)
  - 2) Transfers the excess amount to the appropriate district account if there is a surplus of funds.

Refer to the Appendix, p. 32 for a checklist of things to do for the spring workshop.

## **YEAR-END REPORTS**

### **1. Area Director Annual Report**

- a) Some parts of the area director's reports are a compilation of the Club Annual Reports. The Area Director Club Visit Report will also be useful in completing this report.
- b) Due May 15 to the district governor.

### **2. Club Annual Report**

- a) Due each May 1<sup>st</sup> to the area director.
- b) All clubs must submit a report to the area director.
- c) The area director should make every effort to secure these reports.
- d) Club Annual Report (see Appendix, p. 27).

### **3. Club Meeting and Website Information**

- a) Submit via the district website <http://zontadistrict4.bfn.org>
- b) Due by June 15<sup>th</sup>.
- c) The area director should make every effort to help clubs keep this up to date.



## HINTS AND SUGGESTIONS

### 1. Club Information Items

- a) Each club should submit to the area director the following items.
  - 1) Monthly club newsletter
  - 2) A copy of the club up-to-date membership list:
  - 3) Club Officer Report Form following elections
  - 4) Schedule of club's meeting dates and time
  - 5) List of club committee chairmen, including address, phone number, and email address
  - 6) A copy of the Club Annual Report
- b) Each club's Electronic Communications Chair (ECP) should submit to the Area Communications/PR Chair their club's membership roster via the district website.

### 2. Communications

The first line of communication is the area director's newsletter. However, opportunities for more frequent communication are encouraged. This establishes a closer rapport between the club and the area director and helps the club keep in contact with the extended world of Zonta. Some opportunities to send a personal note might be:

- a) To congratulate a club or an individual on an accomplishment
- b) A farewell and thank you to out-going presidents for their service and dedication (May)
- c) Welcome new presidents (June)
- d) Comment on an item in a club newsletter

### 3. Miscellaneous

- a) Get to know the clubs in your area: read their newsletters, review their reports, and schedule visits.
- b) Keep a "report card" with names of the clubs in the area and important items of information such as meeting night, dues, participation in Young Women in Public Affairs, Jane Klausman Awards, chief fundraiser, annual report received, etc. This will provide a quick "at a glance" reference to who has done what. This will be a time-saver instead of having to go through newsletters, directories, and yearbooks.
- c) Keep in touch by personal notes, e-mails, phone calls, and other means as appropriate.
- d) Read your Zontian and make use of the biennial program issue. Use it to plan area director visits, answer questions, instigate discussions at the president's meeting etc.
- e) Refer to district spring workshop schedule and remind clubs when their turn is approaching.
- f) Invite an area director from another area to attend your home club meeting when you do your official home club visit. This adds another dimension to the concept of district area director.

- g) Keep informed. Members might lose confidence if the area director never knows the answer; but don't be reluctant to say, "I don't know" if you don't. Find the answer and respond to the question immediately.
- h) Read the newsletters.
- i) Lead by your good example!
- j) *Show enthusiasm. It's contagious!*

# APPENDICES



**Expense Reimbursement Form  
District 4**

**Send completed form with receipts to the District Governor for approval.**

**Name:** \_\_\_\_\_ **Position:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Purpose:** \_\_\_\_\_ **Date of Activity:** \_\_\_\_\_

Transportation – Air/Train, etc. ....	\$ _____
Automobile Mileage _____ @ IRS Guidelines.....	\$ _____
Thruway and Bridge Tolls.....	\$ _____
Hotel.....	\$ _____
Meals.....	\$ _____
Postage.....	\$ _____
Telephone.....	\$ _____
Printing.....	\$ _____
Other _____ .....	\$ _____
_____ .....	\$ _____
<b>Total</b>	\$ _____

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Approved By:** \_\_\_\_\_, **Governor** **Date:** \_\_\_\_\_

*For District Treasurer's Use Only*

Check Number: _____	Total Amount: \$ _____	Date Paid: _____
District Fund: _____	Budget Line: _____	Amount: \$ _____
District Fund: _____	Budget Line: _____	Amount: \$ _____



**Report of Gifts in Kind and Donations  
District 4**

**Send completed form to the District Governor**

**Name:** \_\_\_\_\_ **Position:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Purpose:** \_\_\_\_\_ **Date of Activity:** \_\_\_\_\_

Transportation – Air, Train, etc. ....	\$ _____
Automobile Mileage _____ @ IRS Guidelines.....	\$ _____
Thruway and Bridge Tolls.....	\$ _____
Hotel.....	\$ _____
Meals.....	\$ _____
Postage.....	\$ _____
Telephone.....	\$ _____
Printing.....	\$ _____
Other _____ .....	\$ _____
_____ .....	\$ _____
<b>Total</b>	\$ _____

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Approved By:** \_\_\_\_\_, **Governor**

**Date:** \_\_\_\_\_



**Area Director Club Visit Report  
District 4**

**Please send completed form to the District Governor**

District \_\_\_\_\_ Area \_\_\_\_\_ Club \_\_\_\_\_

President: \_\_\_\_\_

Vice President or President-elect: \_\_\_\_\_

Recording Secretary: \_\_\_\_\_

Corresponding Secretary: \_\_\_\_\_

Treasurer: \_\_\_\_\_

Number of directors: \_\_\_\_\_ Frequency of board meetings: \_\_\_\_\_

Number of members: \_\_\_\_\_ Average attendance at meetings: \_\_\_\_\_

Number at this meeting: \_\_\_\_\_ Annual club dues: \_\_\_\_\_

**COMMITTEES**

Are all club members assigned to a committee? \_\_\_\_\_

Do the committees meet regularly? \_\_\_\_\_

Do the committees keep track of service and fundraising hours? \_\_\_\_\_

If not, why? \_\_\_\_\_

**COMMUNICATIONS**

Does the club have a monthly newsletter? \_\_\_\_\_

How are communications from the Area Director, Governor, and Zonta International distributed to members? \_\_\_\_\_

**FINANCIAL**

Does the Club have a budget? \_\_\_\_\_ Does it have a separate service budget? \_\_\_\_\_

Does the budget provide funds for delegates to Conference? \_\_\_\_\_ to Convention? \_\_\_\_\_

Is the Club contributing to: (Insert Yes or No)

Rose Fund? \_\_\_\_\_ Amelia Earhart? \_\_\_\_\_ YWPA? \_\_\_\_\_

Klausman? \_\_\_\_\_ Internat. Service? \_\_\_\_\_ ZISVAW? \_\_\_\_\_

WHPPI? \_\_\_\_\_ Endowment? \_\_\_\_\_ Local service? \_\_\_\_\_

**MEMBERSHIP**

Is an orientation provided for new members? \_\_\_\_\_

When and how? \_\_\_\_\_

Do all members have copies of the club bylaws? \_\_\_\_\_

Do new members have a mentor, or mentors, in addition to their sponsor? \_\_\_\_\_

**Z CLUB**

Does the Club sponsor a Z Club or Golden Z Club? \_\_\_\_\_

**LEADERSHIP**

Please list names of potential leaders to forward to District 4 Nominating Committee.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone and Email: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone and Email: \_\_\_\_\_

**President's Comments:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Club President

**Area Director's Comments:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Area Director



**Club Annual Report  
District 4**

**Return to Area Director by May 1**

**Club Year: June 1, \_\_\_\_\_ to May 31, \_\_\_\_\_**

**Zonta Club of:** \_\_\_\_\_

**President (current):** \_\_\_\_\_

**Treasurer (current):** \_\_\_\_\_

**Membership**

- 1. Club membership as of June 1, \_\_\_\_\_ (year preceding current calendar year) \_\_\_\_\_
- 2. Members added since June 1, \_\_\_\_\_ (year preceding current calendar year) \_\_\_\_\_
- 3. Members lost since June 1, \_\_\_\_\_ (year preceding current calendar year) \_\_\_\_\_
- 4. Net gain/loss of members (subtract line 2 from line 3) \_\_\_\_\_
- 5. Current total as of date of this report (should equal line 1 plus line 4) \_\_\_\_\_

**Financial Contributions**

**Club**

Total for Local Awards (scholarships, YWPA, Klausman, etc.) \_\_\_\_\_  
 Total for Local Service Projects \_\_\_\_\_

**International** (indicates recommended per member amount)

Rose Fund (\$2 US) \_\_\_\_\_  
 Amelia Earhart (\$3 US) \_\_\_\_\_  
 YWPA (\$2 US) \_\_\_\_\_  
 Klausman (\$2US) \_\_\_\_\_  
 International Service Funds (\$5 US) \_\_\_\_\_  
 ZISVAW (\$3 US) \_\_\_\_\_  
 WHPPI (\$1 US) \_\_\_\_\_  
 Endowment (\$2US) \_\_\_\_\_  
**Total Service Contributions (\$20 US/member) \$ \_\_\_\_\_**

**Service and Fundraising Hours**

Total Service Hours (time club members spent on approved service projects) \_\_\_\_\_  
 Total Fundraising Hours (time spent on fundraising activities) \_\_\_\_\_



**Club Information**

**Meetings**

Frequency of meetings (number per year) \_\_\_\_\_  
Is the membership meeting consistently at the same place? \_\_\_\_\_  
Average attendance \_\_\_\_\_

**Annual Club Dues** \$ \_\_\_\_\_

**Membership**

Does the Club have an annual membership drive?  Yes  No  
Does the Club have a **formal** new member orientation?  Yes  No  
Does the Club have a formal mentoring program for new members?  Yes  No  
Does the Club have a new member packet?  Yes  No  
Does the Club send the new member names to the Governor?  Yes  No

**Participation-** Do your members attend?

Spring Workshops? If YES, how many members?  Yes (No.\_\_\_\_)  No  
District Conference? ? If YES, how many members?  Yes (No.\_\_\_\_)  No  
If NO, did the Club send a proxy to Conference?  Yes  No  
International Convention? ? If YES, how many members?  Yes (No.\_\_\_\_)  No  
If NO, did the Club send a proxy to Convention?  Yes  No

**Communication**

Does the Club have a newsletter?  Yes  No  
Is it distributed to all members?  Yes  No  
Is it distributed to the Area Director, Lt Governor, Governor and District Archivist?  Yes  No  
Is it distributed electronically?  Yes  No  
Do you distribute the Governor's newsletter to club members?  Yes  No  
Does your Club have a club brochure or customized District brochure?  Yes  No  
Does your Club have a website?  Yes  No  
Does your club have an ECP (Electronic Communication Person)?  Yes  No

**Long Range (Strategic) Plans**

Does your club have a long-range plan beyond a biennium?  Yes  No  
Do your members participate in setting goals for the Club?  Yes  No  
Are the plans reviewed on a regular basis?  Yes  No

**Bylaws**

Does the Club have club bylaws as outlined in the ZI bylaws?  Yes  No  
Are club bylaws current with the most recent ZI bylaws?  Yes  No  
Do all members have a copy of the ZI bylaws?  Yes  No

**Z Club**

Does the Club sponsor a local Z or Golden Z club?  Yes  No  
Is there a Z/Golden Z club chairman (even if no club)?  Yes  No

**Programs**

Are ZI videos shown to members?  Yes  No  
Does the Club participate in International Women's Day/ZI Rose Day?  Yes  No  
Does the Club participate in YWPA award program?  Yes  No  
Does the Club participate in the Jane Klausman award program?  Yes  No  
Does the Club have a ZISVAW project?  Yes  No

**The Club's Most Significant Achievement This Year** (Hands-On Service, Fundraiser, etc.)

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**Committees**

Please give a brief report of the club's committee activities over the past year. If additional space is required please attach an additional page.

**Status of Women/ Service**

Legislative Awareness/Advocacy

Awards (YWPA, Klausman, Amelia Earhart)

ZISVAW

Z Club, Golden Z Club

Local Service

International Women's Day/ ZI Rose Day

**Organization, Membership, and Classification**

**Public Relations and Communications**

**Program**

**Fundraising**

**Other**

**Club President** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature:** \_\_\_\_\_



## Area Director Annual Report District 4

**Return to Governor by May 15**

Area \_\_\_\_\_

### Membership

1. Area membership as of June 1, \_\_\_\_ (year preceding current calendar year) \_\_\_\_\_
2. Members added since June 1, \_\_\_\_ (year preceding current calendar year) \_\_\_\_\_
3. Members lost since June 1, \_\_\_\_ (year preceding current calendar year) \_\_\_\_\_
4. Net gain/loss of members (subtract line 2 from line 3) \_\_\_\_\_
5. Current area total as of date of this report (should equal line 1 plus line 4) \_\_\_\_\_
6. Number of clubs with less than 20 members \_\_\_\_\_  
Names of Clubs with less than 20 members \_\_\_\_\_
7. State reasons for changes \_\_\_\_\_

### Financial Contributions

Local Awards (scholarships, YWPA, Klausman etc.) \_\_\_\_\_  
Local Service Projects \_\_\_\_\_

#### **International**

Rose Fund \_\_\_\_\_  
Amelia Earhart \_\_\_\_\_  
YWPA \_\_\_\_\_  
Klausman \_\_\_\_\_  
International Service Funds \_\_\_\_\_  
ZISVAW \_\_\_\_\_  
WHPPI \_\_\_\_\_  
Endowment \_\_\_\_\_

**Total Service Contributions** \_\_\_\_\_

### Service and Fundraising Hours

Total Service Hours (time club members spent on approved service projects) \_\_\_\_\_  
Total Fundraising Hours (time spent on fundraising activities) \_\_\_\_\_

### Area Administration

How many President's meetings were held in your area this year? \_\_\_\_\_  
Did you produce an Area Director's newsletter? \_\_\_\_\_  
How many newsletters have you sent this year? \_\_\_\_\_  
In which months? \_\_\_\_\_  
How many official club visits did you make this year? \_\_\_\_\_  
What other Club functions did you attend? \_\_\_\_\_

### Organization and Extension Activity

Is there potential for new clubs in your area? \_\_\_\_\_  
Has any O & E activity occurred in your area this past year? \_\_\_\_\_  
If yes, please detail: \_\_\_\_\_

**Leadership**

Names, Clubs, phone number, email addresses of potential district leaders.

**Recognition**

You will be asked to present awards to clubs in your area at the district conference for these four categories:

- 1. **Public Relations** (consider newsletter, press releases, community involvement, pr material, high profile, website.)
- 2. **Newsletters** (consider frequency of publication, content, distribution and appearance.)
- 3. **Status of Women / Service** (consider hands on, monetary, YWPA, ZISVAW, Z/Golden Z clubs, local service projects.)
- 4. **Membership, Organization and Extension** (consider increase in membership, efforts to acquire new members, sponsor, organize, or mentor a new club or troubled club.)

**Concerns of clubs, strategies or changes in District or International procedures to be brought to the District Board:**

**Your Clubs**

Please briefly describe in a few sentences on a separate page the status, general activities, and your opinion about each club in your area. Included could be - are they growing or shrinking?, healthy attitude?, meaningful programs and service projects, any help they might need or be able to offer others. This information is for the governor's use, and will not be made public.

Name: \_\_\_\_\_

Area \_\_\_\_\_ Director

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Spring Workshop Responsibilities District 4

*Or how to plan a workshop and still have fun.*

<b>Activity</b>	<b>Responsibility</b>	
I. Select date with the host club (clear date with Governor)	AD	Club
II. Plan the meeting assisted by host club	AD	Club
III. Obtain speaker	AD	
IV. Serve as presiding officer, assisted by host club	AD	
V. Meet with the hostess club to:	AD	
View the facility	AD	Club
Arrange for the meeting place		Club
Arrange for meeting rooms		Club
Arrange for seating		Club
Establish registration fee ( <i>Does not to include travel expense or accommodations for Area Director or District representative</i> )	AD	Club
Assist with budget preparation	AD	Club
Facility charges		Club
Meals (including tax and gratuity)		Club
Dinner ( <i>the evening before, if applicable</i> )		Club
Continental breakfast		Club
Break ( <i>coffee, tea; soft drinks in PM if applicable</i> )		Club
Luncheon		Club
Printing of program		Club
Name Tags		Club
Table Favors ( <i>optional</i> )		Club
Other		Club
VI. Appoint registration and finance chairs		Club

VII. Prepare agenda for meeting	AD	Club
VIII. Arrangements (in consultation with the AD)	AD	Club
Equipment (as necessary, consult with AD)	AD	Club
Microphones		Club
Projectors		Club
Visual aids		Club
Water		Club
Other (Gavel)		Club
Physical Settings	AD	Club
Registration table		Club
Display tables for club items and/or sales tables		Club
Head table for speakers and invited guests		Club
Appoint recorder for the session		Club
Photographer		Club
Welcome by host club president		Club
Invocation (non-denominational)		Club
Other arrangements as needed	AD	Club
IX. Prepare materials to be handed out, using materials suggested by Zonta International and District (i.e., evaluation form; ask club for suggestions)	AD	
X. Inform host club of lodging needs for AD, Governor, and invited speakers.	AD	
XI. Submit a financial report to AD within 30 days following the workshop. If there is a surplus of funds include a check for that amount.		Club Club
XII. Prepare report of workshop for District Governor.	AD	



## Spring Workshop Evaluation Form District 4

*This is a sample form and should be taylored for each wokshop.*

---

**Areas:** \_\_\_\_\_ **Date of Worshop:** \_\_\_\_\_

*Please take a few minutes before you leave to complete this questionnaire and return to the registration table. Your feedback is very important in the planning of future workshops.*

What did you find most valuable about today's workshop? Circle one item and add details as necessary.

1. Speaker
2. Small group discussions
3. Informal discussions at coffee and or lunch

What did you find least valuable about today's workshop? Circle one item and add details as necessary.

1. Speaker
2. Small group discussions
3. Informal discussions at coffee and or lunch

Please indicate you level of satisfaction with the following aspects of the workshop. Insert the number next to each item, using the following scale:

1 = Very Satisfied      2 = Satisfied      3 = Dissatisfied      4 = Very Dissatisfied

- |                                    |                                                       |
|------------------------------------|-------------------------------------------------------|
| _____ a) Date and time of workshop | _____ g) Presentations                                |
| _____ b) Theme of Worshop          | _____ h) Group Discussions                            |
| _____ c) Length of Worshop         | _____ i) Workshop handouts                            |
| _____ d) Format                    | _____ j) Opportunity to share with other participants |
| _____ e) Location of Workshop      | _____ k) Luncheon                                     |
| _____ f) Sparkers                  | _____ l) Refreshments                                 |

What changes (if any would you recommend for future workshops?

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What are your suggestions for future topics and/or speakers?

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Optional Information:

Name and telephone number: \_\_\_\_\_ Club Name: \_\_\_\_\_



## Spring Workshop Financial Report District 4

**Mail Copies to District Governor, District Treasurer and your Area Director  
This report is due thirty (30) days after the Spring Workshop**

Areas: \_\_\_\_\_ Date of Spring Workshop: \_\_\_\_\_

Host Club: \_\_\_\_\_

### INCOME

\_\_\_\_\_ Registrations @ \$ \_\_\_\_\_ per registration \$ \_\_\_\_\_

Miscellaneous income: \$ \_\_\_\_\_

**Total Income** \$ \_\_\_\_\_

### EXPENSES

Printing: \$ \_\_\_\_\_

Supplies: (Name tags, envelopes, copies, etc.) \$ \_\_\_\_\_

Hotel/Restaurant: (Meals, meeting room & coffee breaks) \$ \_\_\_\_\_

Postage: \$ \_\_\_\_\_

Refunds: \$ \_\_\_\_\_

Other: (Speaker honorarium etc.) \$ \_\_\_\_\_

**Total Expenses** \$ \_\_\_\_\_

**BALANCE** \$ \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

### COMMENTS

- Spring workshops are not intended to be moneymakers. However, if there is a surplus, please make a check out to Zonta International District 4 and send it to the District Treasurer with a copy of this financial report.
- Retain a copy of this report for your records.





## Spring Workshop Report Form District 4

**Return to the District Governor within 30 days of the workshop  
(Send copies to the District Treasurer and your Area Director)**

---

Area: \_\_\_\_\_ Date of Spring Workshop: \_\_\_\_\_

Host Club: \_\_\_\_\_

Total Attendance: \_\_\_\_\_

Number of evaluation forms returned: \_\_\_\_\_

How many "first-timers" were at the meeting? \_\_\_\_\_

How were they acknowledged? \_\_\_\_\_

What is the average number of years of membership for those attending? \_\_\_\_\_

What did members find most meaningful and worthwhile about the meeting? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

How can future meetings be improved? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Additional Comments: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_