

**DISTRICT 10**

**ZONTA INTERNATIONAL**  
**PRESIDENT'S REPORT**  
**June 1, 2008– May 31, 2009**

Please complete the following questions and return to District 10 Secretary by **June 30, 2009**.

*When necessary, please provide descriptive answers on a separate sheet of paper.*

Zonta Club of \_\_\_\_\_ Club Number \_\_\_\_\_

**GENERAL CLUB OPERATIONS** \_\_\_\_\_

Did your club write and implement a Long Range Plan? \_\_\_\_\_  
Briefly list the points of your plan.

Did your club set Short Term Goals? \_\_\_\_\_  
What were they and did you meet your goals? \_\_\_\_\_  
If not, do you know why not?

Does the Secretary keep minutes of the Board Meetings? \_\_\_\_\_  
Does the Secretary keep and publish minutes of the Club Meetings? \_\_\_\_\_

Does the Treasurer provide a regular report to club members that compares the expenses to the budget and shows a Cash balance and Income Statement? \_\_\_\_\_  
How often is this report presented to the membership? \_\_\_\_\_

Do you recite or publish the Zonta Mission Statement at your Board meetings? \_\_\_\_\_

Do you recite or publish the Zonta Mission Statement at your Club meetings? \_\_\_\_\_

Do you share communications/information from Zonta International and/or District Officers with your membership? \_\_\_\_\_  
How is this accomplished?

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Club President's Signature and Date

**MEMBERSHIP**

Number of members **June 1, 2008** \_\_\_\_\_ (A)

Number of members **May 31, 2009** \_\_\_\_\_ (B)

- A - Renewals \_\_\_\_\_
- B - New Members \_\_\_\_\_(C)
- C - Transfers \_\_\_\_\_
- D - Resignations \_\_\_\_\_

Net Gain or Loss:

Did your club retain 90% of the members? \_\_\_\_\_ (B divided by A)

(**Non new** dues paying members this club year)

Did your club increase by 10%? (**6/1-5/31**) \_\_\_\_\_ (C divided by A)

Did your club hold an annual Orientation? \_\_\_\_\_  
 How many attended? \_\_\_\_\_  
 Briefly describe the event. \_\_\_\_\_

Did your club review the Classification System? \_\_\_\_\_

Did your club have a plan to attract and retain members? \_\_\_\_\_  
 Briefly describe the plan and your goals. \_\_\_\_\_

Did your club have a New Member Event? \_\_\_\_\_  
 How many prospective members attended? \_\_\_\_\_  
 How many current members attended? \_\_\_\_\_  
 How many prospective members joined? \_\_\_\_\_  
 Briefly describe the event. \_\_\_\_\_

Did your club have:

			<u>Actual #</u>	<u>%</u>
75% attendance at club meetings?	Yes	No	_____	_____
40% attendance at area meetings?	Yes	No	_____	_____
25% attendance at District Conference?	Yes	No	_____	_____
5% attendance at International Conv.?	Yes	No	_____	_____
(Even years only)				

**You must attach a current copy of your Club Roster**

**PLEASE NOTE: YOUR CLUB MUST BE IN GOOD STANDING WITH MORE THAN 20 MEMBERS TO BE ELIGIBLE FOR MEMBERSHIP AWARDS AT DISTRICT CONFERENCE.**

Membership Chairman Signature and Date  
 REVISED 3-15-2009



Zonta Club of \_\_\_\_\_ Club Number \_\_\_\_\_

**SERVICE**

Did your club's service committee set specific goals? \_\_\_\_\_

Did your club meet these goals? \_\_\_\_\_

What were the goals?

Are there any goals your club set, but did not yet meet?

Did your club give 1/3 of its service monies to Zonta International Service Projects? \_\_\_\_\_

If no, what % did you give? \_\_\_\_\_

Is this an increase from last year? \_\_\_\_\_

If yes, what % increase? \_\_\_\_\_

List Amounts given to:

ZISVAW \_\_\_\_\_

Amelia Earhart \_\_\_\_\_

UN Service Project \_\_\_\_\_

YWPA \_\_\_\_\_

Jane M. Klausman \_\_\_\_\_

Rose Fund \_\_\_\_\_

Endowment Fund \_\_\_\_\_

WHPPI \_\_\_\_\_

What is your total service budget? \_\_\_\_\_

How many service hours did your club give to these projects? \_\_\_\_\_

What percentage of your club participated in the projects? \_\_\_\_\_

What local service projects does your club support? **Please use separate sheet of paper.**

List amounts given to these projects.

Be sure to include donations "in kind".

How did these projects advance the status of women in your community?

How did these projects meet the goals of District 10 and ZONTA International?

**Definition of Service Hours**

*As adopted at the January 1999 meeting of the ZI Board*

*"Service hours" include the time members spend on service projects the club has adopted. The determination is based on whether the club has taken on responsibility for the project, not how many members participate. (For example, if the club has agreed to provide volunteers at a rape crisis center for 10 hours a week, it does not matter whether 1 member spends 10 hours or 5 members spend 2 hours each.)*

Service hours do not include time members spend on projects the club has not adopted. (For example, a member may volunteer at a hospital as part of a program sponsored by her employer – although the project may be consistent with Zonta’s mission, inasmuch as it has not been adopted by the club, that time does not count as service hours.)

Service hours do not include time spent on fundraising for local, district, and international service projects, because this effort is reflected by the contribution.

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**Service**

*REVISED 3-15-2007*

**CRITERIA FOR  
STATUS OF WOMEN SERVICE AWARD**

Clubs giving 1/3 of fundraising proceeds to International	10 points
Points per \$1,000 in service funds raised	1 point
Points per 1,000 hours of service	1 point
Points for more than 75% participation	1 point
Points for have the 4 required programs (AE, ZISVAW, UN, Legislative	1 point
Points for giving to YWPA at local or district level	1 point
Points for giving to Jane Klausman at local or district level	1 point
Points for each scholarship given by clubs	1 point
Points for each 10 members (no rounding up)	10 points

Zonta Club of \_\_\_\_\_ Club Number \_\_\_\_\_

**PROGRAMS/SCHOLARSHIPS/EVENTS**

Did your club have programs related to:

AMELIA EARHART \_\_\_\_\_

ZISVAW (Prevention of violence against women, children) \_\_\_\_\_

LEGISLATIVE AWARENESS \_\_\_\_\_

UNITED NATIONS \_\_\_\_\_

Did your club submit an applicant for the District 10 YWPA award?

Did you give a local monetary award to your winner?

How much?

Did your club submit an applicant for the District 10 Jane Klausman award?

Did you give a local monetary award to your winner?

How much?

Did your club submit an applicant for the ZI Amelia Earhart Fellowship?

Does your club sponsor a Z Club/Golden Z Club?

Please list the school names and locations.

How is your club involved with the Z Club/Golden Z Club?

Does your club honor a member during the year?

Did you give public recognition to any member during the year and how was that accomplished?

Did your club give a Woman of Achievement Award?

How was the rest of the community involved?

Please list any local scholarships you have established and support, including the amount and frequency of award.

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Service Committee Chairman Signature and Date

REVISED 3-15-2006

Zonta Club of \_\_\_\_\_ Club Number \_\_\_\_\_

**PUBLIC RELATIONS AND COMMUNICATIONS**

Did your club publish a newsletter for members? \_\_\_\_\_

Did you mail / e mail newsletters to District Board members? \_\_\_\_\_

**If you wish to have the newsletter judged, please bring three sets of three different copies of the newsletter to District Conference. Professionals in the field of communications will judge.**

Did your club have a Public Relations Plan? \_\_\_\_\_  
Please attach.

Did your club produce a press book? \_\_\_\_\_

**If you wish to have the press book judged, please bring it to the District Conference. Professionals in the field of communications will judge.**

What is your club's website: \_\_\_\_\_

What percent of your club members are registered on the ZI website? \_\_\_\_\_

What is your club's permanent e-mail address? \_\_\_\_\_

Is your club newsletter on your website? \_\_\_\_\_  
If no, why not?

Is the Zonta logo and mission statement on all information disseminated by your club? \_\_\_\_\_

Has your club obtained its personal logo from Zonta International? \_\_\_\_\_

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Public Relations Committee Chairman Signature



Date

**Zonta International District 10**  
**Judging Criteria**  
**Club Newsletters**

Clubs wishing to enter their club newsletter for competition at district conference must have published at least six (6) newsletters during the preceding club year from June 1 to May 31. Electronic and published newsletters will be evaluated on the same criteria.

Please submit three (3) sets of three issues of your newsletter. Each set should be bound separately and contain the same issues. For example, each set might contain a copy of your May, July, and September issues.








There are two divisions:

-  Division 1 – Clubs with 40 members or less
-  Division 2 – Clubs with 41 members or more

Content:

Item Points

**1. Masthead** (*generally assumed to be on somewhere on front page*) **10**

-  *Newsletter Name*
-  *Club Name and Charter Date*
-  *District Number; Area Number*
-  *Zonta International Mission*
-  *Month and year of issue*
-  *Name, address, and telephone of both the president and editor*
-  *Meeting dates*

**2. International News 10**

**3. District News 10**

**4. Local Club News 20**

**5. Member News** (*Birthdays, Honors, Trips, etc.*) **10**

**6. Neatness and Clarity 20**

**7. Originality and Artistic Merit 20**



**Total Points 100**

As of 3/16/2007

## Zonta International District 10 Judging Criteria

### Publicity Books

A publicity book is the compilation of a club's accomplishments during a single club year from June 1 to May 31. There are two divisions:

-  Division 1 – Clubs with 40 members or less
-  Division 2 – Clubs with 41 members or more







### Item Points

#### 1. Cover 10

#### 2. Fly Leaf 5

*Blank page for recording judge's comments*

#### 3. Title Page 5

-  *Name of club*
-  *Club Number*
-  *District Number; Area Number*
-  *Chartered Date*
-  *Year of Book*
-  *Division Entered*

#### 4. Table of Contents 5

#### 5. Yearbook (or list of members) 5

*(List of members could include profession, length of membership, classification and a picture would be nice. If yearbook is used, judges must be able to look at the yearbook.)*






#### 6. Club Accomplishments: 25

*(All items included must be in chronological order. If you choose to section categories, define each section and place items in chronological order within each section.)*

Examples of items you can include:

- |                       |                                  |
|-----------------------|----------------------------------|
| a. Monthly meetings   | e. Local Service Projects        |
| b. Special meetings   | f. Zonta fundraisers             |
| c. Committee meetings | g. Other events related to Zonta |
| d. Zonta socials      |                                  |

**NOTE:** For all Publicity and Pictures include:

-  *Publicity*
-  *Clippings – include name of publication and date*
-  *Radio/TV – include script, station, and date*
-  *Pictures of special events*
-  *Include name of event, date, and name of participants*

#### 7. Member Accomplishments 10

*Clippings with Zonta members' achievements which are not directly related to Zonta – include name of publication and date*

#### 8. Originality and Artistic Merit 25

#### 9. Quality 10

*(Correctly assembled, acid free/Lignin, type of album, use of sheet protectors, use of product.)*

**Total Points 100**

As of 3/15/2007

Zonta Club of \_\_\_\_\_

Club Number \_\_\_\_\_

**UNITED NATIONS**

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1. Programs - Describe all programs your club had with an international or United Nations theme.

2. Events - Describe any special events your club had or participated in that reflect internationalism.

3. Twin Clubs - Has your club selected a twin club this year? What contact has your Club had with your twin club?

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United Nations Committee Chairman Signature and Date

*REVISED 3-15-2007*

Zonta Club of \_\_\_\_\_ Club Number \_\_\_\_\_

**FINANCE**

1. What month was your budget approved by your membership? \_\_\_\_\_  
*\*Attach a copy of your budget.*
2. Is a dues statement sent to each member? \_\_\_\_\_  
Is it payable on or before April 1? \_\_\_\_\_
3. Are reminders sent for delinquent dues and fees? \_\_\_\_\_
4. Are International and District dues paid by June 1? \_\_\_\_\_
5. Are dues and fees for new members sent to International and District within 30 days of being admitted to the club? \_\_\_\_\_
6. Does your treasurer provide a regular report to club Members that compares the expenses to the budget And shows a cash balance and Income Statement? \_\_\_\_\_
7. Do you have excess cash? \_\_\_\_\_  
If so, how is it invested? \_\_\_\_\_
8. Does your club have a 501(c)(3) Fund for Service monies? \_\_\_\_\_  
How is it funded? \_\_\_\_\_
9. Do you have a copy of the 501(c)(4) letter from the IRS? \_\_\_\_\_  
In case of audit by the IRS, this will be required in addition to your club minutes Financial records and by-laws and organizing documents. (Note: This "group exemption letter" can be obtained from ZONTA International. The group exemption number is 1219. See Appendix 6 of the Manual of Procedures.)
10. Was your club required to file a Form 990 to the IRS? \_\_\_\_\_  
(Note: Clubs with gross income of less than \$25,000.00 are not required to file. If filed, form is due October 15. See Appendix 6 of the Manual of Procedures.)
11. Are the Club's financial records turned over to the incoming Treasurer no later than 45 days after the term of office ends? \_\_\_\_\_
12. Are Financial Records kept for seven years? \_\_\_\_\_  
Who has the records? \_\_\_\_\_

13. Does your club budget funds for District Conference attendance by your Delegate? \_\_\_\_\_

(Note: Service Fund monies cannot be used for this purpose, but a designated Fund-raising activity can fund a delegate.)

14. Does your club budget funds to send a delegate to International Convention? \_\_\_\_\_

Is an amount reserved in the budget in the year no convention is held? \_\_\_\_\_

(Note: By ruling of the IRS, a portion of the Service Fund monies may be used to cover the costs to send a delegate to the International Convention.)

### ***WAYS AND MEANS***

1. What projects does your club sponsor to raise money?
2. How many hours are spent on these projects?
3. How much money does your club raise?

(Please add a page to tell us about your projects.)

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Finance Committee Chairman Signature and Date

*REVISED 3-15-2007*

## FINANCIAL REPORTING

### Suggested criteria for judging financial reports for District conference

Questionnaire provided to club Presidents	20 points
Copies of Approved budgets:	
General Fund	15 points
Service Fund	15 points
Copies of Budget vs. Actual:	
(to date of submission – usually April)	
General Fund	15 points
Service Fund	15 points
Bank reconciliations	
General Fund	10 points
Service Fund	<u>10 points</u>
Total	100 points

Detailed records of each member's contributions                      Bonus points

Judges would be allowed to use discretion in awarding extra credit for presentation of reports, i.e., clean copies, explanatory notes, etc.

## FINANCIAL ACCOUNTABILITY AND RESPONSIBILITY POLICY

Each level of Zonta International should adhere to a strict policy of financial accountability and responsibility. It is the responsibility of all club and board members to base their decision on accurate and timely financial information. In order to have this, all transactions, receipts and disbursements of both operating and service funds must be recorded and reported to members. These reports must be made at least quarterly and all transactions must be reported fully. At the very least, the Monthly Bookkeeping Procedures below should be followed.

### ***Cash Receipts***

1. Record all cash receipts by filling out the monthly cash receipt worksheet. Record the payer and the amount. Then record amount received under the appropriate category. (Why did the person give you the money?)
2. Total the amount column
3. Total all the other columns
4. Add the totals of all the other columns. This should equal the total of the amount column

### ***Cash Disbursements***

1. Record all cash disbursements by filling out the monthly cash and disbursement worksheet. Record payee and amount. Then record amount paid under the appropriate category. (Why did you write a check to the person?)
2. Total the amount columns
3. Total all the other columns
4. Add the totals of all the other columns. This should equal the total of the amount column.

### ***Bank statement reconciliation***

1. *From the monthly bank statement record the balance*
2. Add to bank statement balance receipts collected but not yet recorded on bank statement
3. Subtract the amount of any checks written but not yet recorded on bank statement
4. Look for miscellaneous income or expense (interest income or bank service charge on the bank statement) and record on the monthly cash receipts or cash disbursement worksheet
5. This is the adjusted bank balance. It should be equal to the amount from bank reconciliation proof Step 4.

### **Bank reconciliation proof**

1. Record beginning cash balance
2. Add the total amount from the monthly cash receipts worksheet
3. Subtract the total amount from the monthly cash disbursement worksheet
4. This is the adjusted bank balance and should equal Step 5 above.

### **Financial statements**

1. Record beginning cash balance
2. Record revenue (cash receipts) by category, then total all of the revenue. This total should equal the total amount from the monthly cash receipts worksheet
3. Record expense (cash disbursements) by category, then total all the expenses. This total should equal the total amount from the monthly cash disbursement worksheet.

To the beginning cash balance add the total revenue and subtract total expense. This will give you the ending cash balance, which should equal the adjusted bank balance from above.