



**Zonta International**

**District 3**

**Area Director's Manual**

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## 2016-2018 DISTRICT 3 BOARD CONTACT INFORMATION

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## 2016-2018 DISTRICT 3 COMMITTEE CHAIRS CONTACT INFORMATION

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<b>Young Women in Public Affairs</b>	Linda Foster Trenton / Mercer	1 Stonehearth Court Columbus, NJ 08022	C: 609-923-0525 (Preferred; evenings) O: 865-914-6969 E: <a href="mailto:ljfoster01@gmail.com">ljfoster01@gmail.com</a>
<b>Foundation Ambassador</b>	Lisa Fraser Kimbrough Hampton Roads	1034 Jamestown Cres- cent Norfolk, VA 23508	H: 757-625-5625 C: 757-613-7951 (Business Cell) C: 757-613-7951 (Preferred) E: <a href="mailto:lisa.fraser@cigna.com">lisa.fraser@cigna.com</a>
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## 2016-2018 DISTRICT 3 COMMITTEE CHAIRS CONTACT INFORMATION

<b>Position</b>	<b>Name / Club</b>	<b>Address</b>	<b>Phone / Email</b>
<b>United Nations</b>	Mary Ann Tarantula Northern Valley	One Elder Avenue Bergenfield, NJ 07621	H: 201-387-1536 C: 201-906-2461 E: <a href="mailto:marymac215@gmail.com">marymac215@gmail.com</a>
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## **AREA DIRECTOR**

### **Function**

- To serve as a liaison between the district and local area clubs.
- Administer the affairs of a specific area within the district.
- Support the policies and program of Zonta International at all levels.

### **Qualifications**

- Be actively engaged in a classification.
- Have served at least two years in an elected club office and/or have been a district committee chairman.
- Have served at least one year as club president.

### **Responsibilities**

- Visit each club at least once during the biennium.
- Plan and conduct Spring Workshops.
  - Conducts annual spring workshops in conjunction with another area director.
- In conjunction with governor, conduct a Leadership Training Session for incoming officers.
- Attend all District Board Meetings.
  - Present a report of the area's activities in the format attached (See Appendix, page 29).
  - Present area clubs' issues and concerns.
  - Participate in formulating policies and procedures for the district within Zonta International Guidelines.
- Attend District 3 Conferences.
- Plan and conduct a brief area meeting at District 3 Conference if requested.
- Prepare a summary of area accomplishments for the conference program in a format as directed by the governor.
- Communicate with area clubs:
  - Through an area director's newsletter
  - By notes, phone calls, email, and other means as appropriate

- Become familiar with the operation and activities of each area club.
- Voting member of the district board.
- Perform other duties as requested by the governor.

### **Working Relationships**

- The area director reports to the district governor.
- Local area clubs: Work with club presidents in terms of:
  - Information sharing
  - Understanding and accomplishment of administrative activities
  - Problem identification and solutions
  - Information and education regarding international and district goals
  - Motivation and development of leadership skills
- District governor: Communication should occur regarding:
  - Planned club visits
  - Schedules and plans for workshops and training sessions
  - Individual club or area problems

### **Tools and Supplies**

- Provided by the district:
  - Updates/changes to the District 3 Area Director's Handbook
  - District 3 letterhead
  - District 3 envelopes
  - District 3 Expense Vouchers (See Appendix)
  - District 3 Gifts-In-Kind Form (See Appendix)
  - District 3 Report Forms (See Appendices for club visit, club report, pages 34-35)
- Previous area director furnishes all pertinent material from previous biennium and advice.



# **REIMBURSEMENT GUIDELINES**

## **DISTRICT BOARD, PARLIAMENTARIAN AND COMMITTEE CHAIRS**

### **General**

#### **Expense Payments**

- Claims for reimbursement of expenses for official travel, attendance at events in an official district officer capacity, and conduct of district business will be itemized, and receipts must be attached except as indicated below.
- Expenses for conferences should be itemized on an expense voucher separate from claims for general expenses. Co-mingling claims for conference expenses with general expenses incurred is not permitted.
- Miscellaneous hotel charges, such as laundry, personal telephone usage, video rentals, and mini-bar charges which are added to hotel bills are considered to be personal expenses and shall not be reimbursed. Reasonable amounts for gratuities to housekeeping staff and/or bellmen are allowed; no receipts are required for service gratuities.
- Expense vouchers shall be submitted as soon as possible after expenses are incurred, with the exception of small expenses incurred by committee chairs; but, in all cases, not later than May 15 of each year to facilitate closing of the district financial records on May 31.
- All board members and other authorized travel claimants should travel by the most economical mode possible.
  - Tourist, coach or economy class should be chosen if traveling by air or rail. Airport shuttles to the hotel or meeting place should be used whenever feasible. The governor must pre-approve use of rental cars.
  - When traveling by private automobile, drivers will be reimbursed at the rate of \$.35 per mile plus toll charges and parking. If requested by the governor, claimants may be asked to submit evidence of personal vehicle mileage driven; a printout from an on-line mapping application showing start and end travel points, and/or starting and ending odometer readings are examples of acceptable mileage documentation.

## **District Board**

- Board Meeting Attendance.
  - Meals. Meals are to be reasonably priced. Alcoholic beverages are not included in the reimbursable meal rate, but gratuities associated with the meal price are included.
  - Pre- and post-conference district board meetings. One half of the transportation expenses, plus additional hotel charges if any, and all meals incurred when attending pre-and post-conference board meetings shall be charged as board meeting expenses. One half of the transportation expense for the district board and parliamentarian shall be charged to the conference. All conference expenses incurred for the International representative shall be payable from conference funds.
- Conference Attendance.
  - Costs other than transportation expenses for the district board and parliamentarian, including conference registration fees, shall be charged to the district conference. All conference expenses incurred for the Zonta International representative shall be payable from conference funds.
- Presidents' Meetings.
  - Area directors or other district officers conducting or attending meetings of club presidents shall be reimbursed reasonable expenses associated with the meeting, (e.g. reasonable cost of refreshments provided at the meeting). Costs are normally limited to \$7 per invitee unless extraordinary costs such as printing and remote telecommunication services are incurred. Area directors' mileage and/or transportation costs associated with these meetings are reimbursable as described above.
  - Presidents' meetings, also known as area leadership meetings, should be conducted following district board meetings to ensure that clubs are kept abreast of actions and activities of the district and Zonta International. If necessary, an

additional presidents' meeting should be scheduled in advance of the Zonta International convention to ensure that club presidents and convention delegates are fully informed on matters, such as bylaws changes and Zonta International board candidates, that will be decided at the convention.

- District Conference and Other District-Wide Meetings.
  - To the maximum extent possible, conference and district meeting expenses should be paid directly by the district or conference treasurer.
  - The district conference registration fee for one delegate from a newly organized and chartered club shall be paid from the district's conference fund. Said conference shall be the first one that occurs after club chartering.
  - The district will pay, from the district conference fund, the registration fee; and the cost of meals, transportation, and the double occupancy hotel rate for the district Young Woman in Public Affairs and Jane M. Klausman scholarship recipients, and for local Amelia Earhart fellowship recipients.

### **In-Kind Expenses**

In-kind expenses incurred by district board members and other Zontians should be reported to the district treasurer if incurred to support district operations and events. Although these expenses will not be reimbursed, reporting the costs will help the district understand and budget for the full range of the true costs of operating the district. In-kind expense reports should be sent directly to the district treasurer; they do not require the governor's approval.

# LEADERSHIP TRAINING

## Purpose

- To provide training for club officers
- To share information
- To answer questions
- To meet with each other
- To develop common goals

## Content

- Role of the club president
- Role of the area director
- Goals of the district
- Organization and extension update
- Membership
- Inter-city meetings
- Area director visits
- News of the area
- News of district board meetings
- News of international convention (in convention years)
- Training of officers
- Expectations of area director (deadlines, reports, etc.)
  - Tips for new presidents and other leaders
  - Review of President's Guidelines and ZI Club Manual
  - Discussion of topics of concern to presidents
  - Questions and answers
- Calendar of upcoming Zonta events

## **CLUB VISITS**

### **Schedule**

Each club **must** be visited once biennially. 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.

### **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.

### **Report**

Use the Club Visit Report form to request information from the club (see Appendix, page 34). 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 annual area report.

### **Financial**

The club is responsible for the area director's meal. Any other costs (mileage, hotel) are paid by the district. While area directors may attend other club and inter-city meetings, only the biennial club visit or other club visits authorized by the governor will be reimbursed by the district. Refer to the District's Reimbursement Guidelines (page 8-10) for additional information. Vouchers and receipts must be submitted to the governor.

### **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

## Induction of New Members

**President:** The members of the Zonta club of \_\_\_\_\_ are honored that you wish to join with us in service and fellowship. We welcome you to a global organization of executives and professionals working together to advance the status of women worldwide through service and advocacy.

The name “Zonta” is derived from a Lakhota word of the Native American Sioux peoples 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 improve the legal, political, economic, educational, health and professional status of women at the global and local level through service and advocacy
- b. To work for the advancement of understanding, goodwill, and peace through a world fellowship of executives in business and the professions
- c. To promote justice and universal respect for human rights and fundamental freedoms
- d. 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 world.

Membership in Zonta is an honor and a privilege. Every member has the opportunity and the pleasure of sharing Zonta with other prospective members according to the procedures in our club. Every member also has responsibilities. Regular attendance, participation in club service projects, and support of our international programs is expected of 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 Membership Committee chairman may take this opportunity to introduce each new member with a short biographical sketch, which includes name, classification, business and 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 \_\_\_\_\_(Club Name)\_\_\_\_\_do you receive (names of new members) as (a) member(s) of this club and promise to work with her/him/them to further the ideals of Zonta International?

**Membership:** We do.

**President (speaking to new member/s):** The fellowship of Zonta welcomes you. We ask your support in joining with Zontians worldwide in carrying out the service and advocacy work of Zonta.

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

## **Installation of Club Officers and Board**

This installation ceremony is often performed by a district officer, but may also be performed by a former club president or a Zonta International representative.

**Installing Officer:** The Zonta Club of (Club Name) has completed another year [or term] of service to the community and to the world. We are all proud of these accomplishments and turn now to the year [or term] ahead. Will the officers and directors of the club for the coming year [or term] please come forward? (New board assemblies.)

**Directors of the club,** (names of club directors), your duties are many, and they are important. You will actively participate in all club board meetings. It is important that you attend them regularly, and that you 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 according to the merit of the question with consideration of the governing documents of this club and for the benefit of the entire club 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 as they are outlined in Section 3 under "Secretary."

**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 club board of directors, and to make an annual financial report to the club at its annual meeting. Additionally, it is your responsibility to make timely payment of dues to Zonta International, the district and the area (if applicable) 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 responsibilities 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) 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. If you pledge to fulfill these responsibilities, please say, "I do."

**New president:** I do.

**Installing officer:** 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 officer as that person takes the pledge of office

## **DISTRICT 3 BOARD MEETINGS**

### **Schedule**

- 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.
- Board meetings are usually held three times a year:
  - May
  - September/October; prior to and immediately following the close of the conference
  - January or February (in-person or conference call)

### **Procedure**

- Prior to the meeting the governor sends out the agenda, hotel location, maps, roommate assignments and other necessary information and instructions.
- The treasurer is responsible for making the reservations.
- 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
- Copies are to be provided for each board member and officer, including committee chairs attending the meeting. They are to be sent electronically one week prior to the meeting.

# FALL CONFERENCE

## **District Board Meeting**

The Board meets on the Friday of the Fall Conference or Governor's Event and immediately after adjournment on the last day. The meeting on the last day is usually short; its purpose is to critique the event. Other items may be discussed according to the governor's agenda.

## **Reservations**

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

## **Expenses**

All expenses are paid by the district with the exception of optional special events, non-scheduled meals, and liquor, which are the responsibility of the individual board member. The district will make arrangements for and pay for a shared room. Refer to the District Reimbursement Guidelines (page 9-11) for additional information.

## **Area Meeting**

Area directors may conduct an area meeting for the members of their area at the Fall Conference or Governor's Event. Topics for discussion may include, but are not limited to, items discussed at the district board meeting and topics of general concern to the area.

## **Awards**

The board and the governor will decide in advance what awards are to be given and the criteria to be used in determining the recipients. The governor may direct the area directors to recommend recipients from their areas. Certificates and any other awards are provided by the governor. The governor will determine who will present the awards.

## **Special Assignments**

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

## **Seating**

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

## **SPRING WORKSHOP**

### **District Manual**

The Zonta International District Manual Section 5, "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.....Area meetings are essentially planning and training seminars and should provide club officers, directors, committee chairmen and members useful information on their responsibilities, Zonta International and district programs, and practical suggestions for club programs and projects. All Zontians should be encouraged to attend, particularly new members."

Area meetings are hosted by a club in the area and are generally one-day events with a luncheon included, and should be scheduled for a day of the week that is not a work day for most members. The area director is primarily responsible for planning the meeting, with the assistance of the vice area director and other members of the district board and of the host club. The governor may direct that all area meetings cover the same subjects. The format may vary from area to area. The presiding area director reports to the district board following the area meeting. The governor or her/his designee attends the meeting.

It is recommended that area meetings be fully supported by a registration fee, which includes the cost of the luncheon. The fee does not include costs of the registration fee, travel or accommodation expenses of the presiding area director and the governor (or her/his designee); these expenses should be paid by the district. Overnight accommodations for members attending the meeting are not included in 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.

### **Area Director's Responsibilities**

- 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).
- Meets with the host club
  - View the facility
  - Check for necessary equipment
  - Establish a registration fee
  - Assist with the budget preparation
- Prepares
  - Agenda
  - Other necessary materials and handouts
  - An evaluation form
- Provide the following information to the governor so the call to the spring workshops can be prepared:
  - Date
  - Location
  - Name of host club and contact information
  - Agenda
  - Program information (workshops, speakers, etc.)
  - Registration information and registration chairperson
- Inform host club of overnight lodging needs, if any
- Prepares a report on the meeting and sends to the governor

- Additional Suggestions:
  - 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.
  - 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. 32, for report form).
  - The evaluation forms are valuable in preparing the report to the governor and for planning the following year's workshop agenda.
  - 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.
  - 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.
  - 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.

### **Host Club Responsibilities**

- Arranges for:
  - Meeting place
  - Meeting rooms and seating arrangements
  - Equipment including slide and overhead projectors, microphones and lecterns or podium
- Prepares a budget in cooperation with the area director which includes:
  - Costs of facility and equipment rental
  - Meal costs including tax and gratuity
  - Printing costs for the program and other materials
- Appoints
  - Finance chairman

- Registration chairman
- Prepares and mails the call as requested by the Area Director to:
  - Other guests
  
- Arranges for
  - Registration table
  - Hospitality table or room the evening preceding the workshop
  - Host club president's welcoming remarks
  - Any other special program items
  - Hotel lodging for the area director and any other district officers as necessary
  
- Keeps the financial records of the spring workshop
  - Submits a financial report to the area director within 30 days following the area meeting (see Appendix, p. 32)
  - Transfers the excess amount to the appropriate district account if there is a surplus of funds.

Refer to the Appendix, p. 30 for a checklist of things to do for the spring workshop.

# **YEAR-END REPORTS**

## **Club Achievement Committee Report**

- Due each Spring to the area director, governor and appropriate chairs.
- Annual Club Report Form.
- Date determined by the governor and district board.
- The Area Director should make every effort to secure these reports.



## **HINTS AND SUGGESTIONS**

### **Club Information Items**

#### **To be submitted to the Area Director**

- Monthly club newsletter
- Club Officer Report Form following elections
- Schedule of club's meeting dates and time
- List of club committee chairmen, including address, phone number, and email address
- A copy of the Club Annual Report

### **Communications**

The first line of communication is the area director's newsletter (optional). 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:

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

### **Miscellaneous**

- Get to know the clubs in your area: read their newsletters, review their reports, and schedule visits.
- 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 year-books.

- Keep in touch by personal notes, e-mails, phone calls, and other means as appropriate.
- 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.) Refer to district spring workshop schedule and remind clubs when their turn is approaching.
- 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.
- 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.
- Lead by your good example!
- Show enthusiasm. It's contagious!



## **NOTES**

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## **APPENDICES**



## **Area Director's Report**

### **DATE**

### **Events/Club Meetings Attended**

**Month 1** (be specific)

**Month 2**

**Month 3**

### **Overview**

Include any general comments and an account of your leadership team meeting that may have occurred.

### **Club 1**

Give an overview of the club's status and include any challenges and successes. Give any insights you have about the club. Include number of new members, if any. Note whether or not the club has complied with District requests. Underline any issues and/or concerns to be discussed at the board meeting.

### **Club 2**

As above for each club in your area.

At the end of the report, note any important dates that the District Board should be aware of.

Be sure to attach a copy of your leadership team meeting agenda and minutes if a meeting occurred after the last board meeting and before the upcoming board meeting.



## Area Workshop Responsibilities

Activity	Responsibility
I. Select date and host club (clear date with Governor	AD
II. Plan the meeting assisted by host club.	AD
III. Serve as presiding officer, assisted by host club.	AD
IV. Meet with the hosted 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	AD Club
<i>(Not to include travel expense or accommodations for Area Director or District representative)</i>	
Assist with budget preparation	AD Club
Facility charges	Club
Meals (including tax and gratuity)	Club
Continental breakfast	Club
Break (coffee, tea; soft drinks in PM if applicable)	Club
Luncheon	Club
Name Tags	Club
Table favors (this is not a necessary item)	Club
Other	Club

V.	Appoint registration and finance chairs:		Club
VI.	Prepare agenda for meeting	AD	
VII.	Prepare call to workshop and coordinate email and mailing of five (5) copies to each President for distribution to non-email members	AD	
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
	Head table for speakers and invited guests		Club
	Appoint recorder for the 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	Club
X.	Inform host club of lodging needs for AD, Governor, and invited speakers. (if needed).	AD	
XI.	Submit a financial report to AD within 30 days following the workshop.		Club
	If there is a surplus of funds include a check for that amount.		Club
	If there is a deficit the District will reimburse the Club.	AD	
XII.	Prepare report of workshop for District Governor.	AD	



## Area Workshop Financial Report

MAIL COPIES TO DISTRICT GOVERNOR, DISTRICT TREASURER, AND AREA DIRECTOR

**This report is due thirty (30) days after the Area Workshop**

Hostess Club \_\_\_\_\_ Date \_\_\_\_\_

### Income

_____ Registrations @ \$ _____ per registrations	\$ _____
Miscellaneous Income:	\$ _____
Advance from District for Board registration (if needed):	\$ _____
<b>Total Income</b>	<b>\$ _____</b>

### Expenses

Printing	\$ _____
Supplies (Name Tags, Envelopes, Copier, etc.)	\$ _____
Hotel (Meals & Coffee Break):	\$ _____
Hotel (Rooms):	\$ _____
Postage:	\$ _____
Repayment of Loan (if needed):	\$ _____
Refunds (according to policy by organizing club):	\$ _____
<b>Total Expenses</b>	<b>\$ _____</b>

**Balance** \$ \_\_\_\_\_



## **Comments**

- a) Area workshops are not intended to be moneymakers. However, if there is a surplus, please make a check out to District 3 and send it to the District Treasurer along with the financial report.
- b) Nor are they supposed to lose money. If there should be a deficit, please send this report to the District 3 Treasurer for reimbursement.
- c) Retain a copy of this report for your records.



## Club Visit Report

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

Club Visited \_\_\_\_\_ Date of Visit \_\_\_\_\_

Type of Visit

Biennial Visit \_\_\_\_\_

Induction of new members \_\_\_\_\_

Installation of officers \_\_\_\_\_

If you inducted new members, how many did you induct? \_\_\_\_\_

Number of club members in attendance \_\_\_\_\_

Number of paid members in the club \_\_\_\_\_

Was your visit the “program” for the evening? \_\_\_\_\_

What did you focus on in your “program”? \_\_\_\_\_

If this the topic that the President had asked you to address? \_\_\_\_\_

If not, why did you choose this topic? \_\_\_\_\_

Did the President have a written agenda? \_\_\_\_\_

Was a Treasurer’s report given? \_\_\_\_\_

Were committee reports given? \_\_\_\_\_

In the space below, make any comments about the conduct or content of the meeting or about the club in general.



## Annual Club Report

**To be sent to the Area Director by May 15**

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

**To:** \_\_\_\_\_ (Area Director)

**Zonta Club of** \_\_\_\_\_ **District 3 Area** \_\_\_\_\_

**Club President** \_\_\_\_\_

**Club Membership:**

Number of members as of June 1 of previous year \_\_\_\_\_

Number of members as of above date \_\_\_\_\_

Net gain or loss \_\_\_\_\_

**Service Contributions:**

The Rose Fund \$ \_\_\_\_\_

The International Service Fund \$ \_\_\_\_\_

The ZISVAW Fund \$ \_\_\_\_\_

The Amelia Earhart Fellowship Fund \$ \_\_\_\_\_

The Jane M. Klausman Women in Business Scholarship Fund \$ \_\_\_\_\_

The Young Women in Public Affairs Fund \$ \_\_\_\_\_

The Endowment Fund \$ \_\_\_\_\_

Local Projects \$ \_\_\_\_\_

**Total Contributions** \$ \_\_\_\_\_

**Club Administration and Programs:**

Does the club have a foundation: Y or N      Name \_\_\_\_\_

Does the club have a newsletter? Y or N      If so, is it sent electronically? Y or N

Does the club have a long-range plan? Y or N      If so, is it monitored? Y or N

Which committees does the club have?

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Does the club have a regular meeting place? Y or N

Does the club have programs at its meetings? Y or N

Are District and Zonta International programs discussed often? Y or N

Signed \_\_\_\_\_

Club President