



Zonta International
District 05
Advancing the Status of Women Worldwide

**ADVANCING THE STATUS OF WOMEN
WORLDWIDE THROUGH SERVICE AND
ADVOCACY**

CLUB LEADERSHIP MANUAL

**FOR PRESIDENTS, OFFICERS,
COMMITTEE CHAIRS AND MEMBERS WHO WANT TO
IMPROVE THEIR LEADERSHIP SKILLS.**

REVISED 2014

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I. INTRODUCTION

This manual was originally developed by Past Governor Elaine Swanson (2006-2008) to help Club leaders fulfill their responsibility of their position as effectively, efficiently and painlessly as possible. It was revised by Past Governor Amy Grubbe (2008-2010) and then by Carol Jenkins, District Secretary (2012-2014). This manual does not replace the Zonta International (ZI) Club Manual but provides guidelines for helping leaders function and be successful. It can be used as part of a board or committee chair orientation and made available to members who are considering a board or committee chair position.

Other resources that a Zonta Club should have readily available for its Presidents and other leaders include:

- The **Zonta International Club Manual** which can be downloaded from the Zonta International Website - the Zonta International Club Manual will provide you with the information about what ZI requires.
- A copy of **Roberts Rules of Order** (Parliamentary Procedure) - *Robert's Rules of Order* will help the President and Parliamentarian keep meetings running smoothly.
- **Zonta International Bylaws** (ZI Website) and the **Club Bylaws** - All actions taken by the Club must comply with the Club and ZI Bylaws.
- The **Club Strategic Plan** - The Strategic Plan will identify the goals that the Club plans to carry out in the next few years.

Don't forget to take advantage of the past presidents in your club if you have questions. In addition, some of the best resources are the District Board especially the Area Director. The District Officers and Directors are experienced, caring Zontians who want to help you and your Club function as effectively as possible. Contact Information is available through the District Leadership Guide.

A great Zonta Club should have the following characteristics:

- The President is capable, committed and enthusiastic
- The members "catch" the enthusiasm and pass it on
- Officers and Committee Chairs serve willingly
- Business meetings are run efficiently
- Service projects combine the giving of both time and money and meeting the objectives of Zonta International
- Fundraisers require the participation of everyone
- Meetings are set for the same time each month
- Guest speakers are worth taking the time to hear
- The Club budget contains money for delegates to attend area meetings, conferences and conventions and it is used
- The Club budget contains money for the operating expenses of the club including postage, copying, and Zonta supplies
- Zonta's mission, goals and objectives come first, followed closely by fellowship

Setting the Stage for Success

Congratulations on the election or appointment to a leadership position in the Club! Now is the time to prepare for your term. Obtain the printed resources listed above and read them carefully. Utilize the information that is pertinent to your position. Make an assessment of the Club's accomplishments and compare your findings with the Strategic Plan. Get to know the Club members and their interests. How do their interests fit with the work you want to accomplish? The President-to-be will want to identify those whom would be good candidates for Committee chairs. Passion for the committee work, good leadership skills, communication skills, ability to delegate and experience are all good characteristics for Committee Chairs to have.

It is highly recommended you have a Board and Committee Chair orientation so that everyone knows the goals for the biennium and what is expected of each Board member and Committee chair. Some pages of this manual will provide good handouts for newly elected and appointed leaders.

II. LEADERSHIP

Talents of Successful Leaders

Leaders maintain organizations. Although leadership functions within a group, it begins with an individual. Every Zontian is a leader since every member helps maintain solidarity and cohesiveness.

Successful leaders do the following:

- Concern themselves with the optimum development of each member
- Encourage others to participate, whether by chairing a committee, mentoring a new member, organizing a project, or being a good committee member
- Welcome new members and participate in their orientation
- Create a friendly atmosphere
- Offer reassurance
- Know their own strengths and weaknesses;
- Recognize and rely on those who are strong in areas where the leader is weak
- Know what resources are available to them
- Allow themselves to grow to learn the job
- Listen to what others say
- Keep an open mind
- Wait until they have all the facts before judging the issue
- Are readily accessible
- Stimulate members' interest in accepting higher office
- Prepare themselves to accomplish the task at hand
- Do not allow jobs to accumulate or languish
- Caution against wasted effort on irrelevant projects

- Focus on projects and programs that advance Zonta's goals
- Clarify the situation where confusion arises
- Delegate appropriately
- Gives clear directions
- Follows up to ensure the tasks are accomplished
- Recognize others' accomplishments and successes
- Train their successors

In addition, leaders have many talents. Ten are listed below:

1. Chaos Embracer

Effective leadership requires embracing chaos created by others and creating chaos of your own that is likely to stimulate breakthroughs in creativity and innovation. This implies introducing change long before it is required to outside forces. Instead of establishing isolated change efforts or programs, Clubs need to view change as an organizational constant, evolving and mutating into new forms across time but ever present.

Boards must create policies to provide order to the chaos, shaping and influencing the efforts of staff and volunteers. The goal is not to promulgate binders of procedures but to create and articulate those core policies and practices that will provide valued guidance as the daily chaos is managed by those in the best position to do so.

Leaders create useful chaos when they:

- Break traditional yet arbitrary boundaries that have limited club efforts;
- Set high goals that other will find compelling to attain even though doing so will be difficult and
- Institutionalize forgetfulness by helping unlearn lessons from the past that may be needlessly inhibiting new approaches or new thinking.

2. Wow! Injector

Does your Club have Wow! Opportunities and Projects? Wow! Projects are ones that add value, matter, make a difference and leave a legacy. When people are involved in this type of project or experience, they feel rejuvenated, connected to others and are personally challenged. They have a great time learning and working together. After the project ends, you can bet there will be a large sign-up list for the new Wow! opportunity. Wow! projects and programs help answer the value and return on investment question being asked by members. Loyalty is derived from the quality of each and every interaction. Organizations offering Wow! opportunities are more likely to engender greater loyalty.

3. Facilitator

Facilitation encompasses all the acts that help individuals and clubs take responsibility for their efforts, growth and achievements. Facilitation includes behaviors such as making connections and bridging experiences; focusing the group on essentials; asking the obvious and even unaskable questions; clarifying roles, responsibilities and expectations; providing closure around decisions or results; and releasing potential and support progress.

Facilitative leaders help build the capacity of individuals and clubs to do for themselves that which previously has been done for them or to them.

4. Partner and Collaborator

Club leaders at all levels must become adept partners and collaborators with both internal and external stakeholders. Club efforts are likely to be best served when board, committees and task forces work in partnership. This is a significant change from the more traditional model in which committees recommend, boards decide and committees implement.

Being an effective partner and collaborator requires a set of skills that may differ somewhat from those traditionally sought for club leadership positions. Partners and collaborators need to be strong listeners, not only advocates; communication conduits, not only spokespeople; boundary breakers, not only turf protectors; possibility thinkers, not only probability describers; and honest negotiators, not only tough dealers.

5. Talent Scout and Developer

Today's club leaders must be talent scouts, 24-7-365. It is not only what you know or who you know. Value today is derived from what you know about who you know and what you do with that knowledge. Leaders need to be walking Yellow Pages able to call upon talents as needed to serve Zonta's goals and projects.

Twenty first century organizations will move beyond measuring return on investments and returns on assets and will begin to measure return on talents. Gaining a return on talents requires not only recruiting the right mix, but also on developing the talents of all members. Club leaders must champion growth and development opportunities for members in an effort to expand individual's talent portfolio.

6. Futurist

The goal is not to speculate on what might happen but to imagine what you can actually make happen. All Club leaders must become part-time futurists, regularly scanning the environment to identify trends on the immediate and long-term horizons that might have implications for the Club and its members. Futuristic leaders will develop board and committee meeting agendas that include strategic discussions, not only traditional reports and reviews.

Futurists understand that the future is not something that just happens to us; we are active participants in creating the future. Futurists are willing to use scenario planning and other futuring techniques that explore what might happen as opposed to looking at quantitative data that prescribe what is likely to happen. Club leaders must become comfortable thinking farther into the future than members might immediately value, while still providing programs and services that address current needs.

7. Values Champion

The essence of being a leader is to make sure the organization knows itself. The club leader is a champion of the Club's core values, ensuring their preservation as the organization moves more and more rapidly in an ever-changing environment. The Club leader as values champion helps anchor individuals' and committees' efforts in the organization's core values. In addition, the leader is able to help others distinguish between forms and function as they relate to organizational efforts. (Governance is the function; a board is the form.) A

values champion emphasizes the core value and the function, but is willing to try new forms that meet contemporary needs.

8. Clarity Creator

When committee or board efforts or projects lack clear focus or direction, they immediately appear less attractive. In these cases, volunteers have little interest in going through the motions of volunteer service if they don't view it as leading to a meaningful outcome and contribution. Club leaders need to be vigilant communicators; sending messages that help bring clarity and order to the inevitable chaos that will be associated with the Club's efforts. Having a handful of core messages or talking points and then repeating them consistently can help shape individual efforts on behalf of the club.

Beyond effectively communicating, club leaders can help create clarity by constantly focusing conversations and attention on only those questions and issues that matter most. This means refusing to engage in minutia management that is better left to those more closely associated with the work. It means remaining focused on a longer term strategic agenda rather than this year's plan of work.

9. Passionate Player

Clubs depend on the passions of members to pursue the organization's mission and vision. Club leaders need to be passionate about their role and contributions to the club as well as interested in learning about the passions that others possess. Upon doing so, they can more effectively match an individual's passion with appropriate projects and leadership positions within the club. Individual passion and emotional commitment will almost always win out over rational decision making.

Club leaders understand that tapping into "heart power" is critical, particularly when working with their volunteer peers. They are constantly seeking ways the club can more effectively link individual passion to organizational efforts, as well as tearing down club practices and procedures that needlessly inhibit the power of individual passions being leveraged.

10. Storyteller

Storytelling is back and in a big way. Long recognized by non-western cultures for its social and cultural benefit in transmitting values and rituals from one generation to another, storytelling is being recognized for its power to do the same thing in clubs. Storytelling is how human beings relate to each other. Not through business plans. The more senior you are, the more you learn through storytelling. Club leaders who can effectively tell stories are able to help others learn the lore of the Club, as well as shape their beliefs, values and behaviors. Stories and metaphors are known to enhance individual retention and learning, an important goal for any club leader hoping to break through the noise and information overload most everyone experiences almost daily.

Delegation

The ability to delegate successfully is crucial for leaders. No one can carry out all the goals and functions of the Club by herself. Even if you could, that does not give members a sense of being needed or belonging. Delegation is necessary to accomplish the Club's goals. However, for many of us delegating is difficult to do. Here are some helpful hints on being successful in delegating:

- Determine the importance of what you are delegating, the order in which it is to be accomplished and convey that information to the member(s) to whom you are delegating
- Make sure the member(s) understands the purpose of the task and how it fits into the larger picture of Zonta
- Match the job to be done with the interests and skills of the member(s)
- Spread the work among as many members as possible
- If the project is large, divide the tasks up i.e. public relations, gathering materials, decorations, etc.
- Ask the member(s) to get other members to assist them
- Provide the requisite authority, information and training to do the task
- Establish realistic deadlines for interim tasks and for completion
- Remember that the member(s) will not do the task in exactly the same manner you would accomplish it
- Follow up with the member(s) to provide assistance as needed, monitor progress and establish a mechanism for feedback
- Avoid micromanaging and be willing to accept different ideas to get the job done
- Be willing to replace the member if the project stalls because of lack of attention to it or identify another member who could step in to help move the project along.
- Acknowledge and appreciate the member's accomplishments

III. MEETINGS

Purpose

Zonta Clubs have membership meetings, board meetings, and committee meetings. Membership meetings are the largest meeting that the President will conduct. At this meeting it is important to use *Robert's Rules of Order* to maintain control of the agenda and allow for discussion. Board meetings and Committee meetings are smaller and can be more informal. Still using parliamentary procedures will help to assure that business decisions are made and recorded appropriately. Whatever the meeting the purpose should be made clear. This can be done by notifying members in advance of what action needs to be taken.

Conducting a meeting

When conducting a meeting there are three important things to consider; preparation, facilitation and follow-up.

Preparation

1. Define outcomes. What is the meeting intending to accomplish?
2. Write an agenda. Start with an item that will unify the group.
3. Invite the right people. Are there other members besides the board or committee that could be helpful? Would it be helpful to bring an outside expert to the membership meeting?
4. Anticipate questions and objections. Prepare background information that responds to the logical questions a participant might have. Make it clear that members are expected to read the materials and be prepared for the discussion and decision. Ask members with questions to let you know ahead of time so that you or others can be prepared to answer them.

Facilitation

1. Start and end on time
2. Balance participation. See that everyone participates and no one dominates.
3. Close on an upbeat note.

Follow-up

1. Distribute accurate minutes to the participants
2. Evaluate the results of the meeting

Some Basic Rules of Successful Meetings

- Have an agenda and follow it
- If the meeting is not a regularly scheduled one, pick a time and place that will be convenient for as many participants as possible
- If you have more than forty members in the room, use a microphone. Also use a microphone if one of the speakers has a soft voice, the room is large and the acoustics are poor, the speaker will be using special vocal effects such as whispering or dialects, a stage presence will add to the impact of the presentation, or some members have diminished hearing.
- When appropriate, particularly at Board or committee meetings, sum up at the end of the meeting what the members have decided to do and who will carry out the tasks.
- Use media to enhance meetings and provide information, use power point instead of paper unless the information is needed for another purpose at a later time
- Follow appropriate parliamentary procedure
- Keep members focused on the topic at hand; avoid having a room full of side comments where no one can hear the topic being discussed
- Avoid these common problems:
 - Lack of involvement in planning by the members, make sure they feel ownership
 - Too much sameness, maintain a balance between stability and a fresh approach

- Non-functioning equipment: have extra bulbs and cords, even a contingency plan if nothing works or a speaker doesn't show
- Inappropriate seating, arrange seating according to the formality of the meeting and the need for participants to spread out materials
- Overly long presentations; be sure to give speakers a time limit

Organizing an Agenda

The importance of an agenda cannot be overstated as it sets all the parameters for the meeting; advises participants of the meeting's purpose which is critical to a successful meeting; provides a checklist to ensure all necessary business is covered; and ensures that you follow appropriate protocol and accomplish what you set out to do. Before the agenda is finalized, ask other meeting participants in advance if they have any items they would like to add and distribute the agenda in advance.

To organize the agenda consider the following:

1. Must-do's first. The must-do's are the actions that every board has accountability for, such as approving previous minutes and receiving reports from the treasurer.
2. Use a consent agenda. A consent agenda contains items a board member needs to receive and review but not necessarily discuss. Consent agenda items can be moved to the discussion if a motion is made to do so.
3. Discussion and decision items should be next. Matters that fall under discussion and decision usually include things a board must take a position on. Examples include changes in bylaws, budgets, activities from committees that require approval. Tackle the most important, the most difficult or the most controversial first so that board or committee members are fresh and ready to make decisions. Be sure that background materials have been sent ahead of time with plenty of time for review.
4. Make time for future planning. At one third of the time at each meeting the board or committee should think and plan for the future. The use of specific agenda items related to the future is one way for a board to identify trends, consider the implications of a needs assessment or brainstorm assumptions about the future from a political, economic, technological or socio-demographic perspective. Allowing time for reflection with these future-focused items gives the board or committee members a sense of control and a sense that they are playing offense rather than defense.
5. Make a summary or outline the next steps. At the end of each meeting, take a few minutes to review what has been accomplished during the meeting and be sure that all members know how action will be followed up—who will do what and by when. This is also a good time to review what will be said publicly about a particularly difficult or highly charged issue, ensuring that all members carry the same message from the meeting.

Facilitating Decision-Making

1. Stick to the agenda—agreement on an agenda also assists in stimulating development of group norms. Concentration on orderly procedure in one dimension will suggest other kinds of agreement that may be made informally.
2. Control the traffic of the group—a leader sets the tone of the meeting and its tempo, and like an impresario, she facilitates the work of the group. It is up to her to balance the discussion and to make sure that no single point of view predominates.
3. Resolve conflicts—sometimes disagreements can get out of hand and be interpreted as dislikes. When this happens, it is up to the chairman or other member of the group to defuse the situation.
4. Keep a record of what the group has done and what remains to be done—serve as the group's guide to make transitions from one agenda item to another and to review what has been decided in previous steps. The leader's summary will permit members to raise questions and challenge agreements they do not feel are real. A summary will permit the group to understand what is resolved, so that it does not need to take time to go over resolved issues.

Minutes

Minutes of a meeting should be concise and clear. They should cover the following:

- A heading that includes the name of the club, type of meeting and the date
- Names of the meeting participants
- Brief summary of the agenda item and action taken
- Names of those responsible for carrying the action and deadline for completion
- Decisions should include the motion made and by whom, the seconder of the motion and the fact that the motion passed or failed.
- If reports are presented in writing the report may be incorporated in the minutes; if not, the report should be summarized
- The minutes should not be a verbatim of the meeting, nor should extraneous comments be included.

It is important to ensure that minutes are distributed within a suitable timeframe after the meeting and in advance of the next meeting so that reading the minutes will not take meeting time and the minutes can be used to reinforce assignments and as follow-up at the next meeting. A template for minutes is included in the resources.

Follow-up

It is important that no action item is lost and that action decided upon is completed. Below is a suggestion for making your follow-up foolproof. It can be adapted for Board or Committee work.

Create an action chart. It is a detailed compilation of all actions generated from the meeting, along with the expected completion/next report date, the person or committee responsible, the status and the date completed, each listed in columns. As background, the chart should also catalog the name of the committee, where and when the committee met and who served as chair. Put the action chart to use by:

- Making it official—be certain to fill out the action chart as soon as the minutes are drafted and file it with the official minutes after they are approved. Send a copy of the minutes to each member of the committee. This should occur within two weeks of the date of the meeting.
 - Making it easy—include on the form a column for the name of the person responsible. On the copy going to the individual responsible for the action, highlight the name to make it stand out.
 - Making it systematic—put a copy in your tickler file and check it methodically. Keep the form's status column up to date. This can be done every few weeks in pencil until all actions are complete. Then a permanent copy can be made for the files. Checking status at regular intervals keep you from being surprised by forgotten deadlines.
 - Making it specific—the committee should determine an expected completion/new report date for each action, which is listed on the chart. A nebulous wish list is likely to remain just that. A straight forward due date gives committee members a defined target and a follow-up calendar. Ideally, no one will misunderstand who is responsible for what and when it is due. When everyone is clear on expectations, they are more confident about follow-up and more likely to produce. They are also far less likely to resent reminders.
 - Making it a priority—it is the chair's job to make it clear to members that an assignment is a commitment. Set aside time at the beginning of the meeting to briefly review the actions and outcomes from the previous meeting. On those actions not yet finished, the person responsible should be prepared to report on the status and the expected completion date. Obviously the goal of this exercise is not to embarrass anyone, and clearly some assignments will require longer timetables.
 - Making it official—once all actions on the chart have a completed date, put the final copy in the official minutes. This becomes an easy reference resource when completing the report on committee or board actions at the end of the term of office.
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IV. COMMUNICATION

The success of the club depends on how well the President, Board members, committees and members can communicate with each other. The purpose of the organization and its goals must be conveyed in a clear and concise manner to all members. Decisions made and the subsequent actions to be taken must be related clearly. No one should feel that they “are out of the loop.” Knowing some principles of communication, the roadblocks that can cause communication to fail and ways of overcoming roadblocks will help Boards and Committees to succeed.

Principles of Good Communication

- ❖ **Objective** Have an end result or objective clearly in mind before communicating. Examine the purpose for the communication. What specifically should the receiver of the communication understand or do, as a result of the communication?
- ❖ **Method** What is the best method of achieving the objective? Weigh the alternatives—written or oral, group or individual, formal or informal—before selecting a specific method such as a letter, memo, meeting, telephone call, etc.
- ❖ **Structure** How the communication is organized and constructed is very important to its success. How much or how little to cover: What is the best way to organize the message? How to keep it simple and concise, yet complete? How to gear it to the audience's needs or frame of reference?
- ❖ **Feedback** Encourage frequent responses in order to insure that the message has been understood and to evaluate how the receiver of the communications feels about it.

Roadblocks to Communication

- ❖ Prejudice—defined as a judgment or opinion held in disregard of facts that contradict it; a judgment or opinion formed before the facts are known.
- ❖ Semantic differences—different meanings in language around feelings, assumptions, viewpoints and attitudes.
- ❖ Lack of self-confidence
- ❖ Speaking over the head of the listener—keep it super simple
- ❖ Understanding but not accepting what is said—"I know you think you heard what I said but I'm not sure that what you understood is what I meant."
- ❖ Hearing but not listening—we listen at 500-600 words per minute while we can only talk at approximately 150 words per minute.
- ❖ Lack of trust—People don't believe they will get a fair hearing to begin with
- ❖ Non-verbal—body language saying something different than what is being said verbally

Overcoming Roadblocks

- ❖ Use empathy—the projection of one's own personality into the personality of another in order to understand him better; the ability to share in another's emotions or feelings
- ❖ Realistically understand the other person's differences—what kind of state is the other person in? What kind of background do they have?
- ❖ Use words that are understood by all—keep it simple
- ❖ Speak clearly and maintain eye contact—don't slur or mumble words—speak loud enough for all to hear
- ❖ Be aware of non-verbal signals—body language and what it is saying to you
- ❖ Refuse to let distractions interrupt attention from the other person—concentrate on the person speaking and what they are saying
- ❖ Analyze and evaluate the tone of voice—How are they saying this: What does it mean? How am I saying this? What do I mean?

- ❖ Start listening when the other person starts talking—immediate listening is the only way to be able to judge what is being said

Knowing the participants

Most of us don't think about the way we think, yet the evidence is impressive that different people really do think about things in different ways. Because of the traits we inherited and the early experiences we have, each of us begins to develop particular methods and approaches to identify the world around us, make sense of it and begin to apply what we know to setting goals and solving problems. We pay attention to different aspects of reality, gather different data, order those data differently, draw different conclusions, make quite different decisions, and then proceed to implement those decisions in very different ways. Whether we know it or not, most of us have a strong preference for a limited set of think strategies. While some of us have learned to adapt to different thinking styles depending on the situation, we all think that our way of thinking is the best way. If we are successful in our thinking, that reinforces our thinking style but if we fail, we tend to blame others for not thinking like us. Seldom do we take the trouble to learn how others think. If we did so we would expand our adaptability and other competence in dealing with problem situations and other events in daily life. If we had insight into the way others think, we might connect with them in more meaningful and productive ways. Different ways of thinking accounts for much personal and organizational conflict over direction to be taken, goals to achieve, and the means to achieve them.

InQ has developed a set of questions that measures how people think. The five thinking styles are identified below:

- **Synthesists**, who focus their thinking on ideas and find connections among things that other people see as having little or no relationship -- their style is challenging, speculative, integrative, and process-oriented;
- **Idealists**, who experience reality as the whole into which new data are assimilated, based on perceived similarities to things they already know -- their style is assimilative, receptive, and need-oriented;
- **Pragmatists**, who perceive a world constantly changing and largely unpredictable, requiring a flexible, whatever-works approach to problem-solving -- their style is adaptive, incremental, and payoff-oriented;
- **Analysts**, who see the world as structured, organized, and predictable, who believe there should be one best method for doing anything -- their style is prescriptive and method-oriented; and
- **Realists**, who are inductive, whose mental modes are derived chiefly from observation and their own experiences -- their style is empirical and task-oriented.

To have a balanced board there should be some of every type of thinking style among board members. Having too much of one type can make the board ineffective. For more information about thinking styles, you can go to www.thinkingstyleprofiles.com. This is just one example of the many tools available that you can use to determine the thinking styles or personalities of the Board or committee members. Zonta District 5 does not endorse any of them but provided

this one as an example of what is available. Using the internet to search for others may be helpful to presidents and committee chairs

Preparing the Participants

Having well-prepared membership, board or committee members makes for an effective and efficient meeting. Sending the agenda ahead of time along with supporting or informative documents will help to prepare the members. When it is a membership meeting having information ahead of time allows members who are unable to attend to have input which can be brought by others. During the board or committee orientation, Presidents and Committee Chairs can let their members know what is expected. A well prepared participant:

1. Comes with an open mind but does not hesitate to comment, criticize constructively or disagree.
2. Does not engage in distracting behavior. Prompt attendance, not side conversation, no shuffling of papers, no personal interruptions can all contribute to an orderly meeting.
3. Does not personalize differences of opinion, but rather tries to maintain an objective attitude.
4. Speaks up when one has something to say, but does not hog the floor. If comments are restricted to the meaty items, the discussion should be kept on target and fix the key points in the minds of others.
5. Listens actively to others, be tolerant of their points of view and help them develop their ideas.
6. Helps the president or chair stick to the agenda and controls wayward members by asking for clarification or by making constructive criticism or other appropriate remarks.
7. Takes notes for reference. Note-taking can help fix thoughts in one's mind and can help in the after-stages of the meeting when it is time to implement decisions.

Listening Skills

Part of being a good leader is being a good listener. Members quickly learn if their leaders are willing to take the time to listen to their causes, concerns or complaints. Some listening skills to consider:

- Concentration (become attentive and fascinated with what is being said)
- Anticipate the path or direction the speaker is going and go with them there
- Mentally summarize what has been said
- Weigh the person's evidence by MENTALLY questioning it
- Listen between the lines
- Look for the point the person is trying to make
- Paraphrase the statements made to question the clarity of the statement
- Question with open-ended questions, who, what, why, when, where, and how
- Accept full personal responsibility for your behavior and for the overall behavior of the board or committee

V. WORKING WITH GROUPS

Although most of the time President's, Officers and Committees work with people in their Club, there are occasions when Zontians may partner with other groups. Here are some helpful tips.

- Don't neglect the physical setting. Make sure the meeting is on neutral ground, that the room is quiet and without distractions, and the room is well ventilated and well-lit.
- Don't let the committee or group get too large. As the size of the group increases beyond seven members, quiet members become more reticent. It also becomes increasingly difficult to get recognition for individual contributions.
- Pay attention to seating arrangements. Ideally, everyone should be able to see everyone else.
- Begin and end the meeting with an item that unites the group. This creates an atmosphere of good will. If the group does not reach a decision by meeting's end, refer to past accomplishments.
- Plan the agenda carefully. Put items needing mental energy, bright ideas, and clear heads high on the agenda. Hold back on Items of great interest or concern to everyone until you've handled other business, as these items are apt to take up a great deal of time and the built-in interest will assure liveliness toward the end of the meeting.
- Handle clashes deftly. When a clash of ideas becomes a clash of personalities, turn to a neutral member to dilute the confrontation.
- Learn to control gabbers. A talkative person can be controlled by suggesting that she write a paper for a concerted study or by picking up a phrase that she used, repeating it and then calling on someone else to save the discussion.
- Ask the opinions of the most senior committee members last. This will foster discussion. If, their ideas are introduced too early, they may stifle discussion.
- Choose the strongest advocates of the solution when making any assignment. They will work hardest to prove it was the right decision.
- Get a verbal commitment from each assignee. This commitment made in front of the entire group leads to a greater degree of follow-through.
- Do not ignore the social dimension of a work group. Be sure to schedule a refreshment break.
- Volunteers need rewards, too. These can vary from intangible rewards (such as social rewards of belonging, prestige and esteem in increased visibility and responsibility in the Club or satisfaction of using new skills) to tangible rewards such as letters of commendation, plaques, dinners or other social affairs.

Dealing with unique personalities

The saying "it takes all kinds" is certainly true within Zonta! All Zontians are professional career women (and men) who lead highly successful lives. Zontians are all unique and bring exceptional and distinctive characteristics to Zonta! Here are a few unique personalities you may face in your leadership role and some suggestions for handling them:

<u>Behavior</u>	<u>Suggested Solutions</u>
Agreeable to everything	Ask if she may have some other ideas/suggestions to bring her into the discussion and more involved.
Arguer	Do not automatically dismiss or not listen to this member. Her objections may be legitimate—recognize and deal with the questions/issues/concerns she brings up with the entire group. If it appears this person is eventually arguing for the sake of arguing then talk to this person privately and ask her to participate on more positive tone for the good of Zonta.
Clashing personalities	Ask a question directly on the topic being discussed. Bring in other member(s). Ask that comments be directed to the chair, not to other attendees to diffuse personal criticisms. Speak to the person after the meeting privately.
Definitely wrong	of course, this is subjective as to who may think someone is “definitely wrong.” In any event, do not belittle the speaker. Just make a non-committal comment, move on and then speak to the person after the meeting privately.
Question you can’t answer	State you don’t have an answer and ask if anyone else may have some insight. If not, offer to get an answer from your many resources. Make sure you respond back once you do have an answer-preferably to the entire group but especially to the person who asked the question initially
Obstinate	Maybe she doesn’t understand where you are going with the discussion. If this is the case, rephrase the issue and/or advise her that you will discuss the issue further with her after the meeting.
Has own issue to discuss	If it is pertinent to the subject being discussed, add the issue. If it isn’t pertinent, then advise it will be addressed/discussed later during the meeting according to the meeting agenda, if appropriate. Otherwise, advise that you will discuss the issue with her privately after the meeting.
Rambler	When she stops for breath, thank her. Then rephrase one of her comments and move on.
Side Conversations	Ask everyone to focus on the subject under discussion. If that doesn’t work, pause and let others hear the side conversation. Try to draw the sidebar speakers into the main discussion.

Talks too much	Summarize the discussion so far and direct a question to someone else. If the talker continues, say “Let’s hear what others think.” If the talker becomes difficult, recruit other participants by asking what they think about what the talker is saying.
Too quick and helpful	This member often has the right answer. However, she may prevent other from participating. Thank her and direct a question to someone else or suggest that other opinions be obtained from the group. Make sure she knows that you appreciate her help and ask her to summarize the discussion.
Unable to express ideas	Help out by rephrasing the idea in your own words: “Do you mean...?” Do not laugh, ridicule, or smirk as everyone becomes lost for words at some point during a meeting.
Wrong subject	Acknowledge her point and say you will discuss that particular subject at the appropriate time in the agenda. If not related to any agenda item, then advise her that you will discuss privately after the meeting.

How to Be a Good Follower

In the busy lives we lead, good leaders in one situation are good followers in many others. Here are the ten commandments of followership:

1. First and foremost, ensure the leader’s value system is compatible with yours. Major differences make the role of “follower” intolerable.
2. Articulate your view and position prior to any decision making. Every leader is entitled to know and understand the views of his or her followers in advance of the process. The leader is not well-served by “yes” men or women even though their position is compatible or close.
3. Close ranks once a decision is made. Defend the position as if you along made it.
4. Alert the leader as to progress toward the eventual goal.
5. Keep the leader fully informed; make sure there are no surprises.
6. Never take a public position without first informing the leader in private of your intention.
7. Act as a member of the team; suppress any desire for personal aggrandizement
8. Never disparage fellow followers.
9. Fully convey the doubts and positions of colleagues to your leader.
10. Remember, loyalty is a two-way street. You are free to break ranks if the leader is disloyal to you.

VI. STRATEGIC PLANNING

Who should participate?

Since the Strategic Plan for the Club belongs to the membership, all members should be invited to the Strategic Planning Session. Not only does the Club expand the ideas and suggestions available but members active in the process are also your best supporters in approving the plan. The retreat can be planned at a time before the new officers begin their term or can be planned at the end of the previous term. The framework for the retreat should incorporate Zonta International goals and objectives and the goals of the district and club.

Planning a Retreat

Retreat planning can be done by Board officers and directors or a Retreat Planning Committee. The retreat planning committee should include the president or president-elect.

- If possible plan a day or several hours for the retreat
- Secure a facility where members are comfortable and relaxed
- Have an agenda for the day
- Use board members or committee chairs as moderators of group
- Be sure each group has a recorder
- Have the President or President-elect review the agenda and how the day has been planned.
- Topics for the day might include service projects, fundraising, membership recruitment/retention, club problems. Don't try to do too much in one session.

Brainstorming

A brainstorming session is often helpful during the annual planning meeting in order to:

- Get a quick overview of what's on Zontians' minds
- Give fresh ideas to committees, the foundation, and the board
- Give members the opportunity to receive validation for their own interests/concerns within very controlled parameters

1. Begin by reviewing the basic RULES OF BRAINSTORMING:

Nurture a free flow of ideas, the more the better

Any and all ideas, no matter how far-out, are welcome

There is to be no judging of individual ideas—no negative OR positive comments

It is encouraged to “piggy-back” off of others' ideas

2. Next, divide the membership into groups of 4 to 7 and hand each group a stack of blank cards.

3. Have each group assign one or more recorders to write every idea down—one thought per card.

4. Now explain that for the next 7 minutes groups are to mention everything that comes to mind about Zonta, including feelings, concerns, thoughts, ideas, while keeping in mind the rules of brainstorming—even a positive “that's a good idea!” can crush or stifle the free-flow of thoughts!

5. Strictly adhere to the 7 minute time- allowing the discussions to go on much longer will lead to a gripe session.

6. Have each group divide the cards into piles: one for each committee, one for the board, and one for the foundation, if needed. For example: *“the meetings are too long!”* might go into the Board pile, while *“I’d like more hands-on service projects.”* might go into the Service committee pile.
7. At this point, you may want to allow a small sharing time in which groups report some of the ideas they came up with.
8. Now ask members to divide into their primary committees and distribute the piles of cards. If time allows, the committees can use the idea cards to flesh out their goals for the year and then plan how those goals will be met and measured. Or, it might be more appropriate for your club to have committees meet at another time to do this.

Evaluating Current Practices

It is easy for Clubs to get in a routine of doing the same thing every year. Strategic Planning provides a time to evaluate current projects and have suggestions for new ones. Some projects may be signature projects which provide publicity promoting Zonta in the community or provide a service that the community values and expects. These are ones you want to continue. Other projects may become stale or no longer needed. At this time, community needs can be reviewed and new projects sought. New projects stimulate energy, enthusiasm and bring new members to the Club.

The same thing goes for how each Club is run. Boards and Committees must be open to new ideas and suggestions. Doing everything as it has always been done can lead a club to extinction.

Setting Goals

Only five percent (5%) of people set goals. However, of those 5% who set goals, ninety-five percent (95%) achieve them. To be a viable goal, it must be written down, have an action plan, have a deadline for completion and meet measureable outcomes.

Here are eight steps to setting goals:

1. Identify the goal
2. List the club’s benefit from achieving the goal
3. Identify the major obstacles you must overcome to reach the goal
4. Determine what skills or knowledge are required to reach this goal
5. Identify the individuals you must work with to reach this goal
6. Develop a specific plan of action to achieve the goal
7. Decide on a realistic time limit for achievement
8. Identify measureable outcomes that will tell how well the goal was met.

VII. GROWING MEMBERSHIP

Recruiting

Retaining

Rejuvenate/Renew

Why does membership matter? Because vital, healthy members lead to vital healthy clubs and vital healthy clubs keep Zonta International strong and able to improve the status of women world-wide! Membership Growth must be purposeful and planned by your club. To do so, your club should make sure they have the following in place:

An Active Membership Committee – *This committee is vital to the growth of membership in the club.* The committee should meet on a regular basis (recommend at least 3 times per year and should be working with the club membership on recruitment and retention.

Membership Growth Strategy and Action Plan – Clubs grow membership by recruiting new members and retaining existing members through club rejuvenation. The club strategy/action plan should include all 3 R's of membership growth, have clear goals/objectives and be time-based:

Recruitment:

- New member recruitment and retention goals. Be specific! For example, grow club membership by 12 members in the next biennium.
- Tools for club members – what is your club's elevator speech? Are they energetic, enthusiastic and passionate when talking about Zonta?
- Do you have recruitment focused meetings?
- Are you inviting perspective members to join your club activities prior to considering membership?

Retention:

- New Member Orientation – this helps educate the new members on International and local aspects of Zonta.
- New Member Engagement in Club Activities – getting new members involved early will make them feel included and involved.
- Mentorship Program – This gives new members someone to go to for questions. The Mentor can also ensure that the club is involving and getting to know the new member so they feel welcome and appreciated. It also gives the new members someone to go to for questions on why Zonta does things certain ways, i.e., Robert's Rules, International Service Projects, etc.

Rejuvenation:

- Does your club have projects that deliver on the mission of Zonta?
- Does your club foster fellowship?
- Are you listening to the voices of all your members and being open to new ideas?
- Are you managing conflict in a productive way?
- Are you doing sensing in the club on what members want/need?
- Do you do an annual planning retreat to involve your members in the club's strategy planning?
- Are you helping to grow leaders in you club?

There are several tools out on the Zonta International website on membership, including brochures, forms, PowerPoint presentations, and the Zonta International Membership Manual. In addition, the club can tap into the District Membership Committee for help as needed. Also, is there a club in your District that seems to be growing membership? Connect with their President and Membership Chairman to see what they are doing and reapply!

VIII. RESOURCES AND RECORDS

Club President Resource Guide

Understand your Role as Club President

Read your resources:

Zonta's bylaws and rules of procedure at ZI , District and Club Levels, can be obtained from websites Zonta Club Manual which has a job description of the President (obtain from ZI website)

Zonta Website www.zonta.org and monthly e newsletter

The area director for your club

Past club president-schedule a meeting with the outgoing club president to ensure a smooth transition

Make use of the club's other past presidents

Leading your Club

Tips for a successful and growing club

- Well-lead-supports current leaders and develops future leaders
- Mission focused –advocacy and service and thinks globally and locally
- Supportive of its members-fellowship is import
- Has well run meetings
- Ensures all members are heard-minority are heard and majority decide
- Mentors new members

Membership Growth and Retention

- Listen to the members
- Sustained growth occurs when the club delivers on Zonta's mission-is visible and credible
- Utilize the Public Relations opportunities that are available to your club (go the Zonta

International website and look for Member Resources/Tools/Public Relations Tools

Encourage Contributions to the Foundation

- Encourage club and individual contributions to the Zonta International Foundation (clubs are encouraged to contribute 1/3 of all service monies raised locally to the ZI Foundation)
- If all members of the club contribute to the Foundation this biennium then your club will be recognized at the 2014 Convention

Key Dates

1 April (ongoing) Club dues are due to the club by 1 April and district dues are due to the district by the date the district determines. Area dues may be authorized to be collected.

1 May (ongoing) Club Officer Contact Information forms are due at HQ by May 1—send to memberrecords@zonta.org. Don't forget to also send a copy to the District Governor

31 May (ongoing) ZIF Annual report recognition deadline is 31 May for districts, clubs and individuals.

1 June (ongoing): Zonta international dues are due—Clubs who have not paid their International and District Dues cannot vote at district conferences. On clubs in good standing may vote at the biennial convention.

Instructions are under International Dues Instructions are on the ZI Website under

MemberResources/Tools/ClubTools

Online Dues Instructions are under Member Resources/PayDuesOnline

1 June: New Zonta year starts

8 November: Zonta's birthday

Remember to check the Zonta Website yearly in July for new dates for new ZI projects and the next Convention

Template for an Agenda

Date/Time/Place:	
Subject:	
Participants	
Chairman:	
Note taker:	
Form:	
Overall Objective:	
Expected outcome:	
Preparation:	
Bring to the meeting:	

Agenda:

Item	Topic	Objective	Responsible	Time (min.)	Form ¹		
					I	Di	De
1.							
2.							
3.							
4.							
5.							

Template for minutes

(Committee) Meeting Minutes

Date

[illegible]

This template is designed to enlarge as the information is typed in.

Example of Minutes Template Being Used Board Meeting

October 18, 2012

In attendance:	B. Allen, J. Bruner, D. Herreid, M. Hoffman, K Hrdlicka-Tigges, C. Jackson, S. Keaney, S. Martin, K. Ryan, J Sciotto, N. Sexton A. Tyler, J. Wilhelm
Unable to attend:	
Parliamentarian:	K. Hrdlicka-Tigges
Presiding:	President Margot Hoffman
Call to order	
Minutes from August 16, 2012 meeting	Change Form 99 to Form 990 under Treasurer's Report – Approved as amended
Treasurer's Report	
Club Treasurer's Report	<p>C. Jackson reporting</p> <ul style="list-style-type: none"> • Balance as of 9-1-12 was \$8,753.19. • Deposits for the month were \$0.00. • Expenses for month were \$1,880.70 • Balance as of 9-30-12 was \$ 6,872.49. • The June Club Treasurer's report is attached to these minutes.
Service Foundation Treasurer's Report	<p>C. Jackson reporting for A. Buckley</p> <ul style="list-style-type: none"> • Balance in Huntington Checking as of 9-30-12 was \$9,359.62. • Expenses for month were \$1787.39
Foundation Treasurer Position	<p>M. Hoffman reporting</p> <ul style="list-style-type: none"> • A. Buckley has resigned from the Foundation treasurer position. She will continue to be a member of the club. S. Finefrock and C. Jackson have volunteered to take position of the financial documents and get them in order. • The club board was asked to offer suggestions for a replacement to fill the unexpired term which ends May 2013. • M. Hoffman and K. Hrdlicka-Tigges will research the club and foundation bylaws to determine if a current club board member could be appointed to fill the position until the next election. They will report back at the next club board meeting.
<p>District 5 Conference 10-19, 20, 21, 2012</p> <p>Wine for hospitality suite</p> <p>Conference program ad</p> <p>Zonta store table</p>	<p>M. Hoffman reporting</p> <ul style="list-style-type: none"> • A. Tyler purchased 12 bottles of wine for the hospitality suite. • J. Bruner purchased an ad for the club in the Conference Program featuring R. Arnold and Sarah Sinclair, our YWPA nominee named the district 5 nominee.

<p>Donation for silent auction</p> <p>Signature project slide</p> <p>Names for memorial service</p>	<ul style="list-style-type: none"> • The club will not be purchasing a table at the Zonta store this year. • D. Herreid had a box and plate made similar to those she had made to honor our past presidents as our item to donate to the conference silent auction. • The Amethyst cooking class will be our signature project to highlight at the conference. M. Hoffman developed a PowerPoint slide about it. • J. VanSant, M. Roess and C. Lowery were submitted to be included in the memorial service. E. Taylor will present a tribute to them at the Memorial service.
	<p>M. Hoffman reporting</p> <ul style="list-style-type: none"> • A new definition and guidance about service hours has been developed by K. Ryan for inclusion in the rosters. • Service hours are to be tracked for service, advocacy and fundraising. • The hours should be tracked and reported based on individual time spent in planning and carrying out initiatives and projects. • A monthly reminder for committee members to send their service hours to the committee chairs will be included in the monthly Zontagram. • 7 Zontians and 2 guests attended the luncheon on 10-12, 2012 celebrating the passage of anti-human trafficking legislation in Ohio. K. Hrdlicka-Tigges will send information to C. Shore so the event can be posted on the club webpage.
<p>Club/Foundation Board Transition Task Force report</p>	<p>C. Jackson and A. Tyler reporting</p> <ul style="list-style-type: none"> • C. Jackson and A. Tyler reviewed the proposed transition plan options in detail. 2013-2014 would be the pilot year to begin the transition process. • Three options for the transition process were presented for consideration. • S. Martin moved and B. Allen seconded a motion to accept Option 3 and recommend its approval by the full club membership at the November meeting. The motion passed unanimously. • C. Jackson and A. Tyler will present the option 3 transition plan at the October club meeting. • A question concerning the voting status of ex-officio board members was raised. C. Jackson will discuss this further with N. Coffin, Foundation chair as to the need to consider changing the Foundation bylaws to more specifically include voting status.
<p>October Meeting Program</p>	<p>A. Tyler reporting</p>

	<ul style="list-style-type: none"> • The meeting agenda was discussed and finalized. • S. Martin will develop motion for acceptance of the Mentorship Program as presented by L. Pearson at the September meeting.
Zonta Club of Columbus Tee Shirts	M. Hoffman reporting <ul style="list-style-type: none"> • ZCC tee shirts were distributed to members that had ordered one.
Committee Reports	
Service	K. Ryan reporting <ul style="list-style-type: none"> • OYW Letters were mailed to school superintendents. Nomination materials will be mailed within the next 2-3 weeks. L. Hartley is heading up the planning for the Leadership Forum. • Amethyst Committee – The cooking class was held on October 11th and was a success. A date has not been set yet for Secret Santa. • Hands on Committee will have sign-up sheets at monthly meetings so all Zontians will have an opportunity to participate in hands on opportunities they are interested in. Participants are expected to get a replacement if she is not going to be able to keep their commitment. The next event is at Mount Carmel Hospice putting together memory boxes. • Arrangements for the November club meeting at Amethyst are coming along. Amethyst will have a client there to speak to the group. • S. Martin will put together directions to Jefferson Ave with information about parking and give them to L. Yosick for distribution.
Advocacy	B. Allen reporting for S. Finefrock <ul style="list-style-type: none"> • No report
Operations	K. Hrdlicka-Tigges reporting <ul style="list-style-type: none"> • On behalf of the PR committee K. Hrdlicka-Tigges will remind everyone at the club meeting to make sure the email address that is in the roster is accurate and the preferred address to use to receive Zonta related emails. • The need for a marketing brochure has been identified. Both the Membership and PR committee are interested in the new brochure development. • K. Hrdlicka-Tigges will work with both committee chairs to come up with a plan for development of a brochure that can be presented to the board for approval.

Membership	<p>D. Herreid reporting</p> <ul style="list-style-type: none"> • A report is attached to these minutes. • There are no new club members for orientation in October so it was cancelled.
Fundraising	<p>J. Bruner reporting</p> <ul style="list-style-type: none"> • The nut sale is going well. • The spring silent auction/style show planning is fully underway. The committee is working on various changes for the event. • A Canada/East coast fall foliage cruise is being planned for 2013. Information about the cruise will be presented at the October club meeting. • Planning is underway for Uncorked, the fall wine-tasting scheduled for Nov. 2, 2012 at J. Liu restaurant. The proceeds from the event go to the club treasury. There will also be a silent auction. The club needs to sell a minimum of 52 tickets to break even.

Submitted by S. Martin

Action Chart Template for Foolproof Follow-Through

Name of Committee		Date of Meeting		
Name of Committee Chair				
Action Identified	Expected completion/ Next report date	Person Assigned	Status	Date completed

This template will be best used in landscape rather than portrait orientation. It can be set up on an Excel spreadsheet as well.

Sample Long Range Plan

ZCD Long Range Plan

2008-2009

The scope & purpose of this Long Range Plan is to provide a broad framework & a clearer focus in support of ZCD's goals & objectives. This Long Range Plan does not replace or take precedence over the Rules & Bylaws or the authority of the members & Board. It does define high-level goals that will produce more efficiency & ensures the most effective use of limited resources by focusing on key supportive goals. This document is organized by functions, not Committees; therefore it is not meant to limit cross functionality, but to identify & expand key functions for all Committees.

FUNCTION	DESCRIPTION	COMMENTS
Administrative	<ol style="list-style-type: none"> 1. All key Committee & Presidential data is backed up on computer medium (flash drives) <ol style="list-style-type: none"> a. New Archive Committee will assist in developing standards & formats for short & long range procedures for each Committee b. Archive Committee will review & select past documents for permanent retention on computer medium 2. Committee Check-off Lists will be developed by Committees w/ assistance of the Archive Committee: <ol style="list-style-type: none"> a. Check-off Lists will be used for training; b. to ensure critical goals are met in a timely manner; c. to confirm what data must be saved & passed along 3. Key data for each Committee is passed to next Chair & President 4. Rename & redesign the ZCD Directory <ol style="list-style-type: none"> a. "Beyond a Directory"; b. One long-term member to assist Mbr Chair with content & format; c. Include key ZI & ZCD organizational structure in Directory 5. Encourage all Committees & members to communicate pertinent & timely information w/ each other to improve & enrich ZCD's PR efforts, events & overall enjoyment of participation & service. 6. Seek out and experiment with ways to streamline all administrative tasks 	<p>1a – Hasn't happened yet</p> <p>1b – 1% complete</p> <p>2 – 0% – committees need to work on these</p> <p>4 – 100%</p>

Membership	<ol style="list-style-type: none"> 10% net growth annually Continue Prospective New Member event w/ new venue - @ discretion of President & Mbr Com Develop and implement a mentoring & retention toolkit & a plan to ensure Zonta Continuing Education Develop program for 'New Z' sub-Committee and put on a CD 	<p>4 – 25%</p>
Education	<ol style="list-style-type: none"> Smoke Signal will have ZI information on a monthly basis (obtained from ZI web site) <ol style="list-style-type: none"> new Information Officer to collect & share info for SS Present a Zonta & Education Moment @ every meeting 	<p>*Past Governors & President to provide info.</p> <p>0%-need follow-up on this</p>
Service	<ol style="list-style-type: none"> Develop 4-5 Mission related hands-on service opportunities, per year Communicate w/ other Clubs in Area 3 on Service Projects & Grants to avoid duplication of efforts & reduced impacts in the Metro area. Work w/ FR, PR, Membership & others as needed, to coordinate efforts & maximize Film Festival, etc. 	<p>Service Projects are uniquely defined & may be separate from Service Grants.</p> <p>2 – 20%</p> <p>3 – 70%</p>
Service Grants	<ol style="list-style-type: none"> Review & update criteria & procedures for awarding Grants: <ol style="list-style-type: none"> Establish 3 year limits on Grants, with exceptions permitted by approval from the Board & members (effective for Grants fall of 2008); Time-limited organizations can reapply after a one year hiatus; All finalists for Service Grants must have at least one site visit before a Grant is awarded Work with PR Committee to revise web site so grant applicants can access (1) parameters for grants, (2) application form, and (3) other information to be submitted Use web-based tools in rating non-profit organizations: <ol style="list-style-type: none"> for selecting organizations in soliciting applications; for reviewing non-solicited applications Review application & update as needed annually Increase \$\$ amount of individual Grants to maximize positive impacts 	<p>1 – 100%</p> <p>2 – may not be feasible</p>

Sample Club Membership Planning Survey

Determining Zonta Foothills Priorities

At the January retreat, the club voiced a need to improve some of our efforts, such as the grant process and fundraising. To that end the Strategic Planning Committee would like to determine the club's priorities at this time. Preliminarily, the committee felt a five year strategic plan with a three year implementation cycle might be appropriate and that our efforts would be best directed toward goals set by the club.

What are the main things the club should achieve in the next 3-5 years?

Pick 5 and rate them 1 through 5 where 1 is the most important.

1. _____ Raise money to donate to charities that promote our mission.
2. _____ Grow membership.
3. _____ Provide social events for members
4. _____ Provide opportunities to volunteer.
5. _____ Advocate for our main issues of health, safety, economic self-sufficiency, education and legal rights.
6. _____ Recruit applicants for ZI scholarships
7. _____ Get recognition and visibility for the club in the community.
8. _____ Provide a place for members to learn about issues relating to our mission
9. _____ Provide a place for members to develop skills (e.g. public speaking, accounting, computer, PR).
10. _____ Groom members for roles at Area, District and International.
11. _____ Create a branding for the club by emphasizing a signature event, (e.g. Women in the Work Force, a fund raising event).
12. _____ Support Bev Hackbart Scholarship by annual contributions
13. _____ Obtain corporate sponsors.
14. _____ Other: Please describe.

What do you want to gain from being a member of Zonta Foothills?

Check any that apply.

1. _____ Attend social events with other members
2. _____ Have access to volunteer opportunities
3. _____ Improve résumé
4. _____ Work with likeminded individuals to achieve a common goal
5. _____ Achieve more as a group
6. _____ Make business contacts

7. ☐ Learn more about local and international women's issues
8. ☐ Gain personal satisfaction
9. ☐ Develop skills (e.g. public speaking, accounting, PR, computer)
10. ☐ Other: Please describe
11. ☐

The kind of volunteer work I prefer to do through the club

Check any that apply.

- ☐ One-on-one hands-on work with people who need help.
- ☐ Group event where other members volunteer also.
- ☐ Ongoing work with a group over a year or so.
- ☐ One-time events.
- ☐ Assist nonprofits with their fundraising events.
- ☐ Assist nonprofits with behind the scenes work like stuffing envelopes.
- ☐ Work that is not directly with the people being helped, like putting together gift bags.
- ☐ Making donations like used books or turkeys.
- ☐ An event that is the club's own (like Women in the Work Force)
- ☐ I am unable to volunteer at this time

Please list any groups you currently volunteer with and indicate if they would be good candidates for club volunteer activities.

What kind of fundraising event(s) would you like to see in the future?

- ☐ Authors' Luncheon
- ☐ An event at the Boulder Theater featuring an important author, comedian, music, etc.
- ☐ Fair trade fashion show
- ☐ Wine and cheese parties at a home or winery, perhaps in support of a specific project or organization
- ☐ An art or other kind of exhibit with items for sale
- ☐ Sell something (like the fair trade items, coffee, bulbs)
- ☐ Get a business to hold an event and donate a portion of the proceeds (restaurants, a sale at a store)
- ☐ Other _____ fundraising _____ events _____ such as _____

☐ Don't care

Is it important to have our fundraising reflect our mission? Yes _____ No _____ Nice but not important _____

What percent of the members' available time should be devoted to:

_____ Raising and distributing money to charities

_____ Volunteering (both creating opportunities and actual volunteering)

_____ Other

Is there anything the club doing now that we should quit doing?

Is there anything the club is doing now that we should change?

Is there something in particular you would like to be considered during our strategic planning?

Revitalization Plan

_____ CLUB NAME

REVITALIZATION PLAN

ADOPTED BY CLUB BOARD:

_____ (NAMES)

ON _____ (DATE)

Present Status of Club

members (June 1, present year)

new members (in each of last 3 years)

members that have left (in each of last 3 years)

\$\$ in Club/Foundation Treasury (total)

Other indicators (e.g., \$\$ raised in F-Rsrs, impact in community, % membership participating in F-Rs & Service Projects)

Conclusions from Board Discussion of Healthy Club Inventory

(Each Board Member may fill out HCI individually, and then Board convenes to discuss answers & conclude regarding the following.)

Club Strengths

Club Areas Needing Improvement

Club Long-Range Goals/Vision

How do you want to see your club in 2-3 years? (& further out if your imagination takes you that far)

Get concrete... -what kind of impact in your community? -how many & what types of members? -what type(s) of fund-raisers? -what are you known for?

Club Goals for Coming Year (Limit this to 3-5 Goals that work together. Pls. include Mbrship net growth => +1/yr.)

ACTION PLAN* TO REACH YEAR 1 GOALS

Goal # 1:

Step 1--

Step 2--

Step 3--

Step 4—

Goal # 2

Step 1—

Step 2—

Step 3—

Step 4—

Goal # 3

Step 1—

Step 2—

Step 3—

Step 4—

Goals should be stated in terms that you will when you have achieved them.

Each Step includes who will do what by when.

Each Club Board member, and Committee or Club members responsible for a goal or step should receive a copy of this plan.

Monitoring the Action Plan (by Club Board as part of Club meetings)

WE will check our progress toward the above goals and whether we have done what we said we would accomplish per the following schedule

1 st Check-up _____	Completed _____	4 th check-up _____	Completed _____
Date	date	date	date

How did we do? _____

How did we do? _____

2 nd Check-up _____	Completed _____	Celebrated?! _____	Completed _____
Date	date	planned date	date

How did we do? _____

How did we do? _____

3 rd Check-up _____	Completed _____	New Goal Setting _____	Completed _____
Date	date	planned date	date

How did we do? _____

How did we do? _____

At the end of year 1, record the same indicators you noted at the beginning in “Status of the Club” and start a new annual plan.

Parliamentary Terms

Adjourn: To terminate a meeting officially

Adjourn sine die (without delay): An adjournment that terminates a convention or conference

Adjourned meeting: a meeting that is a continuation of a regular or special meeting and that is legally a part of the same meeting.

Adopt: To approve, to give effect to

Agenda: The Official list of business to be considered at a meeting or convention

Amend: The change, by adding, deleting or substituting words or provisions

Appeal: A decision of the presiding officer may be appealed. An appeal requires that the decision be referred to the assembly for its determination by a vote

Chair: The chairman or woman or presiding officer; the “station” of the presiding officer

Change in Parliamentary Situation: Phrase used in determining when a motion may be renewed. A “change in the parliamentary situation” means that motions have been proposed or disposed of, there has been progress in debate or other changes have occurred to create a new situation so that the assembly might reasonably take a different position on the question.

Common Law: Law developed by court decisions, judge-made law.

Constitution: Document containing fundamental law and principles of government adopted by an organized body

Dilatory Tactics: Strategy used to delay action; use of motions and discussion to delay a vote

Division of Assembly: a vote taken by counting members, either by rising or by a show of hand; often taken to verify a voice vote

Ex-officio: To hold an office or position because of holding another office; e.g. a president may be an “ex-officio member of the finance committee

Expunge: To strike out or cancel the record of the previous action

Gavel: Mallet used by presiding officer of a deliberative body to open and close meetings and to maintain order.

General Consent (unanimous): an informal method of disposing of routine and generally favored proposals by the chair assuming the group’s approval, unless an objection is raised

Germane: Pertaining or relating directly to, having definite bearing upon, applied to the relationship of amendments to motions as well as to the nature of discussion.

Immediately Pending Question: When several questions are pending before the assembly, the last question proposed must be decided first by the assembly.

Incidental Motions: Motions relating to questions that arise incidentally out of the business or order or manner of considering the business of the Assembly

Informal Consideration: A method of considering a question without observing the rules governing formal debate

Invariable Form: a motion that can be stated in only one way and when it is, it is not subject to change or amendment

Majority Vote: More than half (1/2) of the total number legally voting, or if by ballot, more than half of the legal votes cast, unless otherwise defined.

Motion: A proposal submitted to an assembly for its consideration and introduced by the words, "I move..."

New Business: Any business, other than unfinished, that is properly brought before an assembly

Object to Consideration: To oppose discussion and decision of a main motion

Old Business: Any unfinished business from a previous meeting that is properly brought before the assembly

Parliamentarian: An advisor to the presiding officer, one who is skilled in parliamentary practice

Parliamentary Authority: The manual or code adopted by an organization as its official parliamentary guide that governs in all matters not covered by the bylaws and rules of the organization

Pending Question: A question or motion before the assembly that has not yet been voted upon

Plurality: More votes than the number received by any other of the three (3) or more opposing candidates or measures; may be less than a majority

Point of Order: An assertion amounting to a demand addressed to the presiding officer that a mistake should be corrected or a rule enforced.

PARLIAMENTARY PROCEDURES AT A GLANCE

To do this	You say this...	May you interrupt speaker?	Must you be seconded?	Is the motion debatable?	What vote is required?
Introduce an item of business for discussion	"I move that "	No	Yes	Yes	Majority
Amend a motion	"I move to amend this motion."	No	Yes	Yes	Majority
Take a temporary break during a meeting	"I move that we recess until..."	No	Yes	No	Majority
Postpone a pending item of business until a later date	"I move we postpone this matter until..."	No	Yes	Yes	Majority
*Suspend a pending item of business until later during the meeting	"I move we table this business."	No	Yes	No	Majority
*Resume consideration of a tabled item of business	"I move we take from the table..."	No	Yes	No	Majority
Have an item of business Studied in depth	"I move we refer this to _____ Committee."	No	Yes	Yes	Majority
*Immediately close discussion on a motion	"I move the previous question."	No	Yes	No	2/3 Vote
*Consider something not in the scheduled order	"I move we suspend the rules and...."	No	Yes	No	2/3 Vote
*Ask for verification of the results of a voice vote	"I call for a roll call vote."	Yes	No	No	No Vote – Chair handles
*To request additional information or details	"Point of Information"	Yes	No	No	No Vote – Chair handles
*Call attention to an error in procedure or a rule violation	"Point of Order"	Yes	No	No	No Vote – Chair decides
*Express a concern about noise, room temperature, etc.	"Point of Privilege"	Yes	No	No	No Vote – Chair decides
*Appeal a decision made by the Chair	"I appeal the Chair's decision"	Yes	Yes	Yes	Majority
*Adjourn the Meeting	"I move that we adjourn."	No	Yes	No	Majority

* = Not Amendable

Date: 4.08

Tips for submitting ZI Scholarship applications

General Tips for Scholarship Submissions

(Detailed information provided on ZI website:

<http://www.zonta.org/memberResources/Tools/AwardScholarshipFellowshipTools>)

- Make sure there are no typos or grammatical errors on the application. If necessary, have the applicant make corrections and re-submit.
- Make sure that all of the requirements have been met per the application guidelines.

Failure to do this could have the application rejected at the District level.

Jane M. Klausman Women in Business Scholarship – Summary of Requirements

- Any woman undertaking a business and/or business-related program at an accredited university/college or institute (including Online), studying and living in a Zonta District and who is in at least her 2nd year of an undergraduate program through the final year of a Master's program at the time the application is submitted to the District. She must still be attending school to be eligible.
- Previous International Jane M. Klausman Women in Business Scholarship recipients may not apply to renew the scholarship for a 2nd year.
- Prior to distributing the application form, clubs should insert their name, return address and deadline on all pages.
- Clubs must supply ZI HQ with a club email and/or website address to include on the Zonta International website club locator. This helps potential applicants find their local Zonta club.
- Clubs may request additional information not required by the application, but they should not submit this to ZI.
- Clubs may not alter the questions on the application.
- Incomplete applications will not be considered.
- Application check list:
 - Completed application form
 - One recommendation from a faculty member in the major field of study
 - One recommendation from an employer, voluntary supervisor or academic advisor. (Members of ZI are not eligible to write recommendations.)
 - An essay of 500 words or less that clearly describes the applicant's academic and professional goals, the relevance of her program to the business field, and how the scholarship will assist her in reaching her goals
 - Verification of Enrollment at the university from the Registrar
 - Transcripts of grades or equivalent records with an explanation of the grading system for each transcript submitted.
 - All non-English documents must be translated into English
- All application materials must be received by the Zonta Club by the deadline printed on the application.
- Applications can be submitted by fax, mail or email (preferred). Those submitted by email must be signed and sent as a PDF. Applications that are incomplete or late due to postal delays, transmittal by third parties or other circumstances will not be considered.
- Applications are due to District by **July 1, 2014**. District awards one Jane M. Klausman Women in Business Scholarship in the amount of \$1,000. Clubs may develop their own award at the club level.

- The District submits the winning scholarship application to ZI by **September 1, 2014**. ZI awards twelve (12) \$7,000 scholarships.
- Decisions are made and announced in **mid-October 2014**

Young Women in Public Affairs Scholarship

- Prior to distributing the application form, clubs should insert their name, return address and deadline on all pages.
- Clubs must supply ZI HQ with a club email and/or website address to include on the Zonta International website club locator. This helps potential applicants find their local Zonta club.
- Clubs may request additional information not required by the application, but they should not submit this to ZI.
- Clubs may not alter the questions on the application.
- Women aged 16-19 as of April 1st, studying and living or working in a Zonta District who can demonstrate evidence of the following are eligible to apply
 - Active commitment to volunteerism
 - Experience in local or student government
 - Volunteer leadership achievements
 - Knowledge of Zonta International and its programs
 - Advocating in Zonta International's mission of advancing the status of women worldwide
- Checklist:
 - Completed and signed application. Incomplete applications will not be considered.
 - Applicants should adhere strictly to the number of words requested in brackets for each question and the word count should be provided at the end of each answer. Additional words will not be considered.
 - Verification of Current Enrollment form completed by school/institute official
 - Two confidential recommendations from adults, not related to the applicant, such as teachers, school officials or community leaders. Recommendations must be mailed directly to the Zonta Club listed on the application. (Note: Recommendations are to be reviewed only as additional information about the applicant, or in the case of a tie.)
 - At club option, applicants or finalists may be interviewed as part of the evaluation process. It is the responsibility of the club to ensure that all information requested in the application is obtained from the applicant and that the Application Cover Sheet for Clubs is filled in, before forwarding the application to the District.
- Applications and Cover Sheet are accepted by fax or mail; however, email is preferred. Applications submitted by email must be signed and sent as a PDF.
- Club applications are due to District by **April 1, 2014**
- District recipients are selected and applications received by ZI by **May 1, 2014**
- Announcement of District and International Recipients by **July 1, 2014**
- District Awards are \$1,000 each
- International Awards (12) are \$4,000 each.
- Clubs may develop their own awards.

Amelia Earhart Fellowship (Applications are submitted directly to ZI, but guidelines are included for Info)

- Open to women registered in a full-time Ph.D./doctoral degree in aerospace-related sciences or aerospace-related engineering, when funds are received in September and will not graduate before April 2015.
- The fellowship may be used at any university or college offering accredited post-graduate courses and degrees. Note. Post-doctoral research programs are not eligible for the Fellowship.
- Current Amelia Earhart Fellow may apply to renew the Fellowship for a 2nd year and will undergo the same application and evaluation procedures.
- Checklist
 - Completed application form.
 - A letter of acceptance or verification of enrollment must be submitted with the application.
 - Demonstrate a superior academic record at an accredited university with courses in aerospace-related studies as verified by official transcripts and recommendations. In programs where graduate transcripts are not provided as a matter of institutional policy, provide a statement of that policy from the registrar or other school official. Electronic transcripts will not be accepted. The official transcripts and verification of enrollment may be submitted by email as long as they are signed and sent as a PDF in color. If not able to scan color, submit the official transcript and verification of enrollment via regular mail.
 - Provide evidence of a well-defined research program in aerospace-related science or aerospace-related engineering as described in the application essay, the academic documents and publications.
 - 3 recommendations from professors (or supervisors); at least one of the recommendations must be from a research supervisor or advisor. Recommendations sent by regular mail must be confidential and enclosed in a sealed envelope signed by the referee. If sending by email, use the provided Recommendation Waiver form.
 - Verification of Current Enrollment form from the university/college registrar
 - All non-English documents must be translated into English
 - Information other than official transcripts and recommendations must be limited to the space provided; attachments, articles, pamphlet, etc. are not requested and will not be considered.
 - If applicant is applying for a second Amelia Earhart Fellowship, she must submit a complete application. In describing the research program, she should identify what she has achieved in her studies, since receipt of the first Fellowship.
- Applications are accepted by email and regular mail; however, email is preferred. Applications submitted by email should be sent to programs@zonta.org. They must be signed and sent as a PDF.
- Applications for 2014 must be received or post-marked by **November 15, 2013** to be considered. Applications that are incomplete or late due to postal delays will not be considered.
- Applicants will be notified of their status by the end of **April, 2014**.
- The fellowship award is for \$10,000 and will be paid in **September 2014**.

Please note that dates will change every year and check with Zonta International.

List of items that should be kept for the Archives

All minutes of the Executive Committee of the Board of Directors

All minutes of the Board of Directors

All minutes of any regular/special/planning meeting

All correspondence from District Officers

All correspondence from International officers/directors

All correspondence from elected city, county, state, national officials

All advocacy correspondence

All printed programs of special events, celebrations, district conferences, international conventions, fund raisers, status of women celebrations, etc.

All written year end committee reports

All news articles pertaining to club events/news items about members where Zonta is mentioned

All printed copies of histories of the organization

All photographs of organizational events dated with identification

Copy of the Articles of Incorporation/charter/by-laws

Copies of the Annual Treasurer's report/audit

Club Programs and Club Rosters

Listing of all Presidents, Area Directors/Governors from the Club

The history of the club (past history) with update from last history update (this item is separate from archiving of records.)

Records can be archived at any college, university, library, local city archives. Once they are archived they are owned by the entity which archived them but make sure they will be accessible for club members and the general public.

Ten questions that may help you to determine if your Zonta Club is working for you

By Carmen C. Gomez, Zonta Club of Nassau

Zonta International is a worldwide service organization of executives working to improve the legal, political, economic, health and professional status of women through service and advocacy. It does this through the efforts of more than 28,000 women and men in over 1,200 clubs in 66 countries across the globe. The mission of Zonta at the club (local community) level, as well as the international level, depends on the commitment and active participation of every member.

If you think your Zonta Club is in trouble and could use some help in maintaining its commitment to the ideals of Zonta, then reflecting on these 10 questions and developing a plan for the way forward may be a good idea for you and for your club.

Does your president lead?

Zonta is a complex organization, which changes leadership every two years and yet expects great results from its membership. The President of a Zonta Club is the elected leader; she is expected to lead, and members expect to follow. Zontians are all business and professional people. As such, they are expected to be capable of leadership and were in fact invited into the fellowship of Zonta because they were perceived as successful or had the potential to be successful in business or the professions.

Does the Club do anything?

Ask yourself, "What does my club do?" Does the club have projects that support Zonta's objects and its mission? Is the club in some way supporting the women of the community? What fundraisers does the club have and are they fun? If you can't answer yes to each of these questions and give examples to support your answer, then the club needs to take a hard look at itself and its existence as a Zonta Club. Zonta is after all an organization dedicated to advancing the status of women through service and advocacy.

How do the Club's Service Programs measure up to the mission of Zonta International?

Zonta International, through its Foundation, is one of the largest global charitable organizations around. ZI expects clubs to support its international service program through gifts of money and to mirror those programs through local projects in the club community. Do the club's service projects relieve hunger, provide clean water, protect women and children from domestic violence, prevent trafficking humans, help to prevent the spread of HIV/AIDS, promote education among women and girls, empower women and girls? Although projects of ZI may change from biennium to biennium, if the club is not involved in meaningful and sustainable programs that have a positive impact on the community, then it is not being true to its mission. That could be a reason for the ennui displayed by the membership. Zontians need to be fulfilled.

How do you rate the club's meeting programs?

Quality programs are essential to maintaining interest and zeal in club members. Does the club make the necessary effort to design and build quality programs that can sustain the excitement necessary to retain its membership? Are club meetings informative and interesting? Does the

club go after high quality speakers with interesting subjects? Members expect to grow mentally and spiritually. The monthly meetings need to provide nourishment for this growth.

How do you rate the Club's attendance record?

Meeting programs and attendance are closely related, as attendance is motivated by the quality of the meetings. If more and more members elect to miss meetings on a regular basis, it is time to evaluate the quality of the meetings. Are meeting programs worthy and timely? Do they relate to the mission of Zonta? Like everything else, the planning of club meetings requires thought and effort. Lackluster meetings will not attract attendance.

How much do members really know about Zonta?

An integral part of commitment is interest in and knowledge of the history, goals, and mission of the organization. When was Zonta founded? By whom? Why? What is the meaning of the name "Zonta"? How many members are there? What countries do they come from? The more the members of the club know about Zonta, the stronger, more positive, more responsive will be the membership.

Do the leaders and members of the club attend international events?

Area workshops, District Conferences, and International Conventions are ways to train leaders and members in the Zonta Family. When members attend these events they will be better prepared to lead when it is their turn to be the club president.

Are members of the club willing to accept leadership roles?

A sure sign of decay in any organization is the inability to inspire members to accept leadership roles. Members will hesitate to lead an organization that is not vibrant, effective or responsible to its mission. If members are not willing to serve, then it is important to take a hard look at the club in terms of its effectiveness in carrying out its mission and in satisfying the needs of its membership.

How are new members recruited and inducted?

Membership in Zonta is an honor and a privilege and is by invitation. Is the club recruiting members just to increase numbers? Are potential members aware of the ideals of Zonta? How are the leadership skills of potential members assessed? How is the commitment to service (in both time and money) of potential members assessed? How do you induct new members into the club? Is it just "Welcome, Jane, Here is your pin and dues are \$250 per year?" Or is it an event that new members will not forget? Are new members given a thorough introduction to the ways in which the club operates? First impressions are lasting and set the tone for the future.

Why am I in Zonta?

Finally you need to ask yourself this question. When you do this, write down the reasons, and share them with fellow Zontians. Remember that as a member, you have obligations to the club and are an integral part of its success as an organization. If you neglect to give of your time and money, if you fail to participate in fundraising or service projects, if you do not attend meetings regularly, if you have never attended an area, district, or international meeting, if you refuse to accept leadership roles in the club and if you know little or nothing about Zonta then you need to examine your motives for joining and your commitment to your club. **Achieving for Zonta is achieving for you.**