



# ZONTA DISTRICT 12

## HEALTHY CLUB INVENTORY

This is a collection of criteria from various sources. It is to be used as a tool for clubs so that we can move away from the 'we don't know what we don't know'.

*Use of this checklist/inventory: Technical Assistance by District Board teams visiting Clubs. After some use & refinement by the Board, we hope to make it a 'self-assessment' checklist. Zonta International is also developing such a tool and may use ideas from this inventory.*

-KLM 12/30/10

<p>The criteria below describe a positive club activity or attribute.</p> <ul style="list-style-type: none"> <li>• The criteria in black are considered basic &amp; essential to a functioning club.</li> <li>★ The criteria that are starred &amp; in blue are considered more advanced &amp; 'best practices'.</li> </ul>	<p><b>Levels of Implementation</b> (on header of each page) Check off in appropriate square of the grid:</p> <ol style="list-style-type: none"> <li>1. Not yet considered</li> <li>2. Planning</li> <li>3. Early Implementation</li> <li>4. Functional</li> <li>5. Well-established</li> </ol>
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CRITERIA	1	2	3	4	5
<b><u>Governance/ Overview/ Leadership</u></b>					
<i>*Necessary to be a club in good standing: allowed representation at conferences &amp; conventions. (Zonta District Manual 2008, p. 57.)</i>					
• *Our club has paid (current) Zonta International dues & fees.					
• *It has provided ZI Headquarters with a current & complete Membership list (when annual dues & fees were paid).					
• *It has paid District dues.					
• *It has organizational activity in accordance with Zonta International & Club bylaws provisions.					
• We establish and update our club goals to ensure they are aligned with Zonta International.					
• Our club officers know what they are responsible for & how to do their jobs.					
• The club committee chairs know what they are responsible for & how to do their jobs.					
• Our club leaders & some members attend Area Meetings.					
• Our club leaders & some members attend District Conferences.					
• Our meeting programs are worthwhile, timely, and related to Zonta's mission.					
• We use parliamentary procedure for our business meetings.					
• Our club by-laws are up-to-date & in accordance with ZI Bylaws.					
• Every meeting where business is transacted has an agenda and some form of minutes.					
• We invite District Leaders to participate in Club meetings & activities.					
★ While focusing on Zonta's mission, the club's leaders also lead the club in achieving growth & overall vitality.					
★ Our club does long-range planning to give it direction.					
★ All members participate to help the club achieve its goals.					
★ Our officers have enough assistance so that they are not overwhelmed with tasks club members could do.					
★ We consult with District Leaders when needed & appropriate.					

Zonta D12 Healthy Club Inventory – CRITERIA	1	2	3	4	5
★ Our club leaders & some members attend International Conventions.					
★ Our Club Board stays connected with our members.					
★ The Club has a plan/means to deal with internal conflicts.					
★ We have a <i>conflict of interest</i> policy for officers and committee chairs.					
★ Records are kept on club meetings & events, and they are used to improve future events (e.g., #mbrs attended, # invited, # joined as result, program, food, invitations, timing...).					
<b><u>Finance</u></b>					
• Our club pays its dues obligations on time to ZI & District 12.					
• Our club Treasurer keeps accurate financial records.					
• The club adopts an annual budget.					
• The club & the board receive regular financial updates.					
• The club financial records are periodically subject to independent review/audit.					
★ The club budget is tied to planning objectives.					
★ The club has clear information correctly linking 1/2 –year & full year dues to membership benefits.					
<b><u>Public Relations</u></b>					
• Our club has a Committee whose responsibility it is to manage external communications.					
• Our club keeps ongoing positive relations with other organizations & businesses in the community.					
• We ensure that our club website is current for the year.					
★ We have a lively, up-to-date club website.					
★ Our club has its own brochure.					
★ Most of the professional women in our community have heard of Zonta.					
★ Our club is recognized for addressing the status of women in our community.					
★ Our club partners with other non-profits and like-minded organizations in our community.					
★ We keep a record/list of the achievements of our club & members to share with audiences/media outside the club.					
★ We have established a 'Zonta brand' for this club in our community.					
<b><u>Internal Communication</u></b>					
• The basic expectations of membership are made clear for all.					
• Electronic communications are used help to keep members informed of activities and responsibilities.					
• Our Club leaders read District & ZI communications and inform other club members re such.					
★ Our President shares the club's annual report with members.					
★ We publish & e-mail a club newsletter on a regular basis.					
★ We share our story with Zontians outside our club.					

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<b>Service</b>					
• Our club has an active Service Committee.					
• All of our local service projects focus on advancing the status of women.					
• The service committee’s project selection criteria includes Zonta’s objects.					
• Most of our members participate in our club’s service projects.					
★ Our members are aware of issues affecting women (such as VAW, working conditions, childcare, family leave policies, healthcare, estate-planning...).					
★ We periodically research the needs of the disadvantaged women/girls in our community & seek to play a role in addressing those needs.					
★ Our service projects help to advance the visibility & positive reputation of Zonta in our community.					
<b>Scholarships</b>					
• Our club has a committee/coordinator whose responsibility it is to inform the club & manage scholarship opportunities.					
• Our club solicits applicants, selects (YWPA & JMK) scholarship winners, and forwards the club winner’s application to the District on a regular basis.					
★ Our Scholarship Chair provides regular status reports re our club’s involvement with Zonta Scholarships.					
★ Our club has selected a YWPA/JMK scholarship winner who also won the District award.					
<b>Advocacy</b>					
• Our club has an active LAA Committee.					
• Our members have a basic understanding of Zonta advocacy and what they can do to help.					
• Our club selects Zonta mission-focused advocacy projects.					
★ Members know about the conditions/needs/laws for women in the US & other countries via CEDAW & other reports.					
★ Our advocacy projects are timely and well-researched.					
★ Our advocacy improves the impact/status of our club with the leaders in our community/region.					
★ Our Advocacy Committee regularly informs our members of issues & relevant pending legislation.					
★ Members participate to act on issues of concern to women.					
<b>ZI Foundation/United Nations</b>					
• Our members are informed regarding the ZI Service Projects.					
• Our club contributions to the Zonta Int’l Foundation are at least 1/3 of its earnings.					
★ Our club promotes giving to support the ZI scholarships & fellowships (YWPA, JMK, & AE).					
★ Our members are informed regarding Zonta’s consultative status with the United Nations.					
★ Some of our members also make individual donations to ZIF.					

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<b>Fundraising</b>					
• Our club has delegated clear responsibility for planning & managing fund-raising efforts.					
• Most members participate in our club’s fund-raising projects.					
★ Our club has established financial & legal structures to facilitate fund-raising.					
★ We plan & integrate 'multi-purpose' functions—accomplishing several objectives with one event.					
★ Our fund-raisers mention Zonta’s & club’s specific scholarships & service projects.					
★ Our club has a mission-related event, which helps to build membership.					
★ We reach out to local companies for event sponsorship \$\$\$.					
<b>Membership (OMC)</b>					
• Our club has an active OMC Committee.					
• Our club has a clear, written membership application process and uses it.					
• The club ensures an occupationally diverse membership (per the <i>OMC Manual</i> ).					
• All new members receive an orientation regarding Zonta goals, responsibilities, structure, etc.					
• All members participate in recruiting.					
★ All new members are assigned a mentor (other than sponsor) who provides support & acts as a source of information.					
★ All members receive ongoing ZI ‘reorientation’ & updating.					
★ We recognize & publicize the achievements of our members.					
★ Internal cliques are purposefully discouraged.					
★ Members are more interested in objects of Zonta than promoting their businesses (or selves).					
★ Networking is encouraged within this set of priorities & Zonta policies, and we sponsor periodic social & networking events.					
★ We survey members to determine satisfaction and priorities.					
★ We examine membership data (retention rate, demographics, etc.) to improve club diversity & effectiveness.					
★ Follow-up is done with members who miss meetings & with lost members to understand their concerns.					
★ The Board discusses strategies to recruit & retain members on a regular basis.					
<b>Nominating/Succession-planning</b>					
• Our club’s Nominating Committee is active most of the year.					
• The NomCom is knowledgeable re the requirements of each position.					
• The NomCom produces a full slate of qualified candidates.					
• The Committee recruits replacements to fill vacated positions.					
★ Our club has a succession strategy to ensure skilled leadership.					