

CAMP CRAFTS



ZONTA
INTERNATIONAL

DISTRICT 4
BUILD A BETTER WORLD
FOR WOMEN AND GIRLS

CREATE RECORDS FOR ANALYZING FINANCES & TARGETING STRATEGIES

2025 North American Inter-district Meeting

June 20 – 22, 2025 Novi, MI USA



**BUILD A BETTER WORLD
FOR WOMEN AND GIRLS**

Sheena Poole
Nancy Peacock

CAMP CRAFTS



ZONTA
INTERNATIONAL

DISTRICT 4

BUILD A BETTER WORLD
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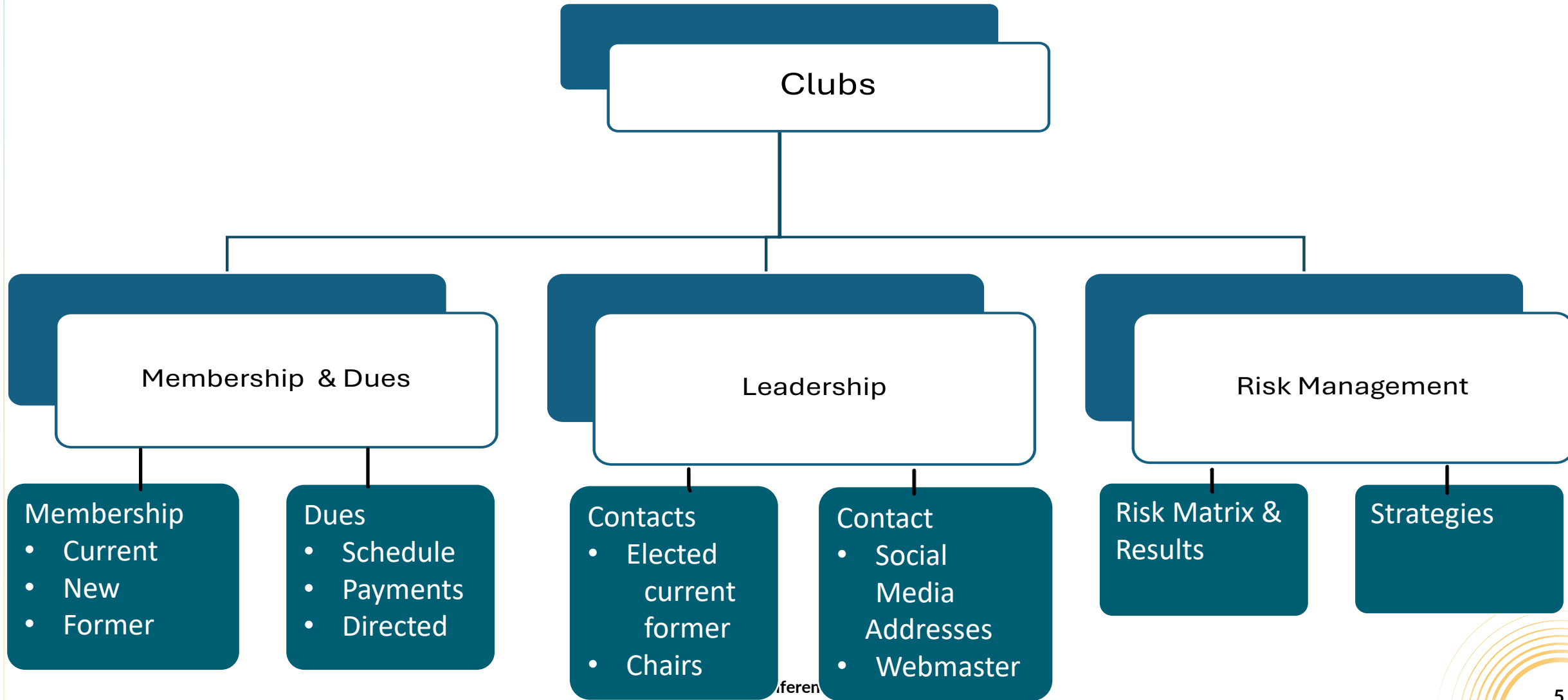
HISTORY



**BUILD A BETTER WORLD
FOR WOMEN AND GIRLS**

PURPOSE

Zonta Information & Management (ZIM)



ZONTA INFORMATION & MANAGEMENT (ZIM)

**Responsible for
Oversight at District
Level**

ZIM Administrator
Channel Team Leaders

CURRENT PLATFORM
Google Docs (*free*)

ZIM OVERSIGHT & MANAGEMENT

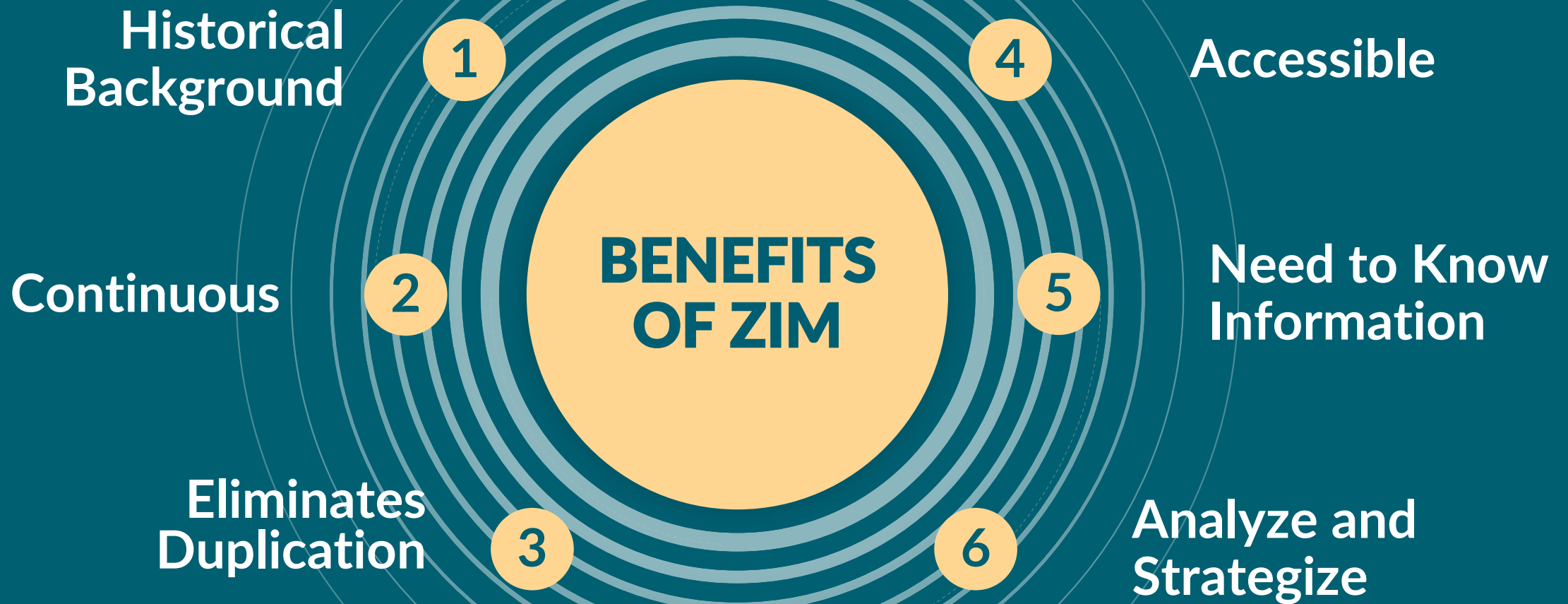


One System

One Stop to store
and process
information

THREE CHANNELS

POSSIBLE ADDITIONS



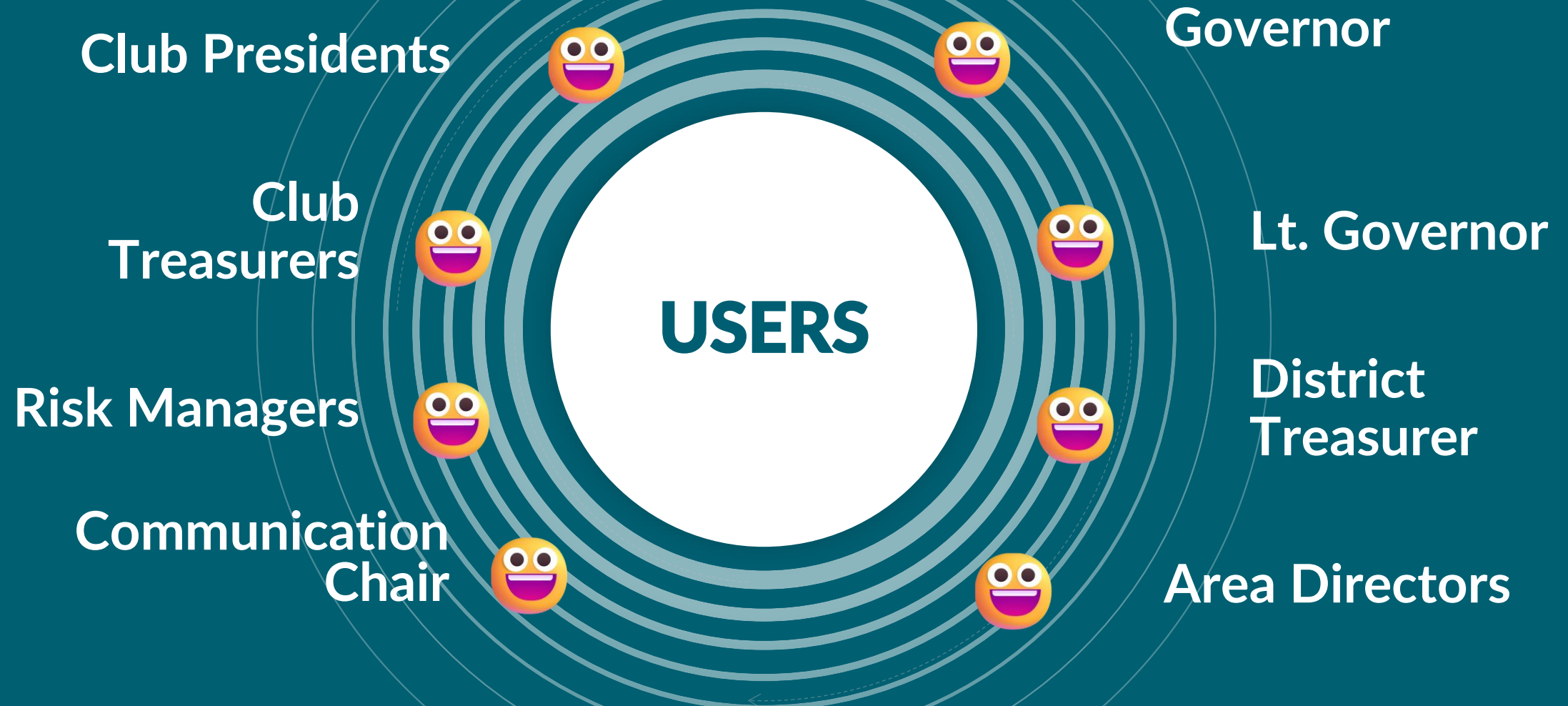
ACCESS THE SYSTEM

**Access based
on need
granted by:**

ZIM Administrator

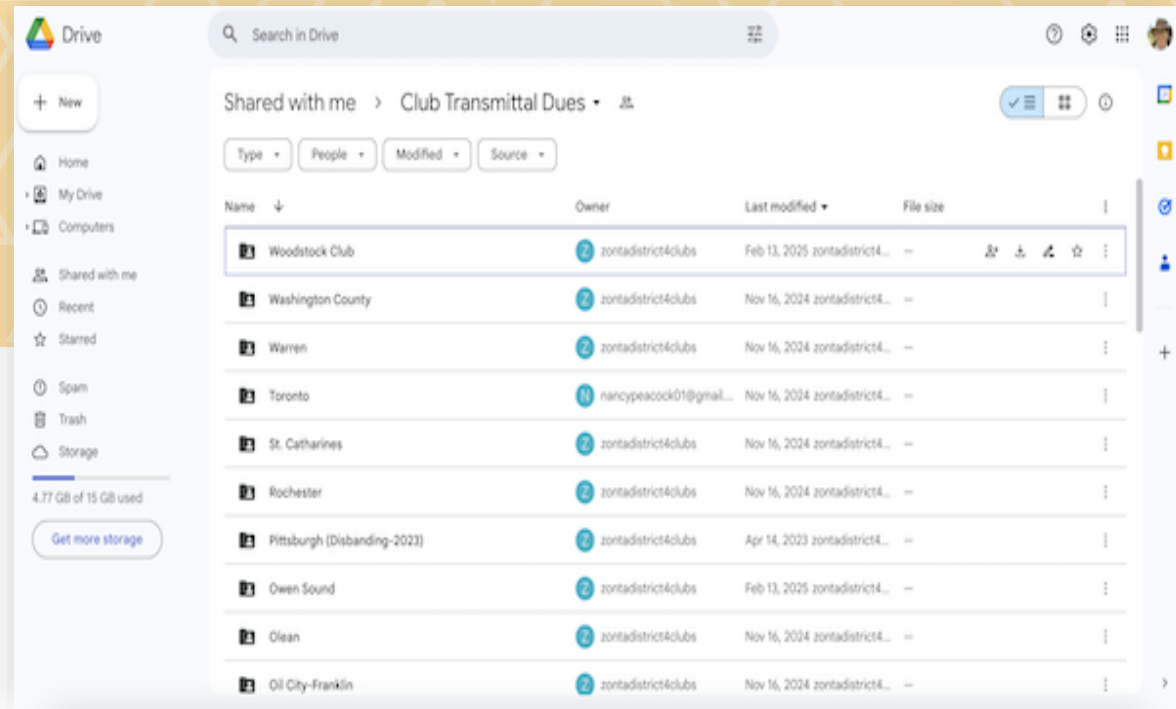
Channel Team Leader

Security



CLUB FOLDER & FILES

One Folder per Club (Google)



Three Files

- **Membership**
 - Instructions
 - Current Members
 - Former Members
 - District Dues
- **Club Leadership**
 - Current leadership
 - Other Club Information
- **Risk Assessment Plans**
 - Risk Matrix
 - Risk Management Plan

SET UP AND MAINTENANCE

Set-Up

Establish club folders

Club Files

Set up users

Notify users of access

Maintenance

Add folders and files for
new clubs

Change users or add new
users

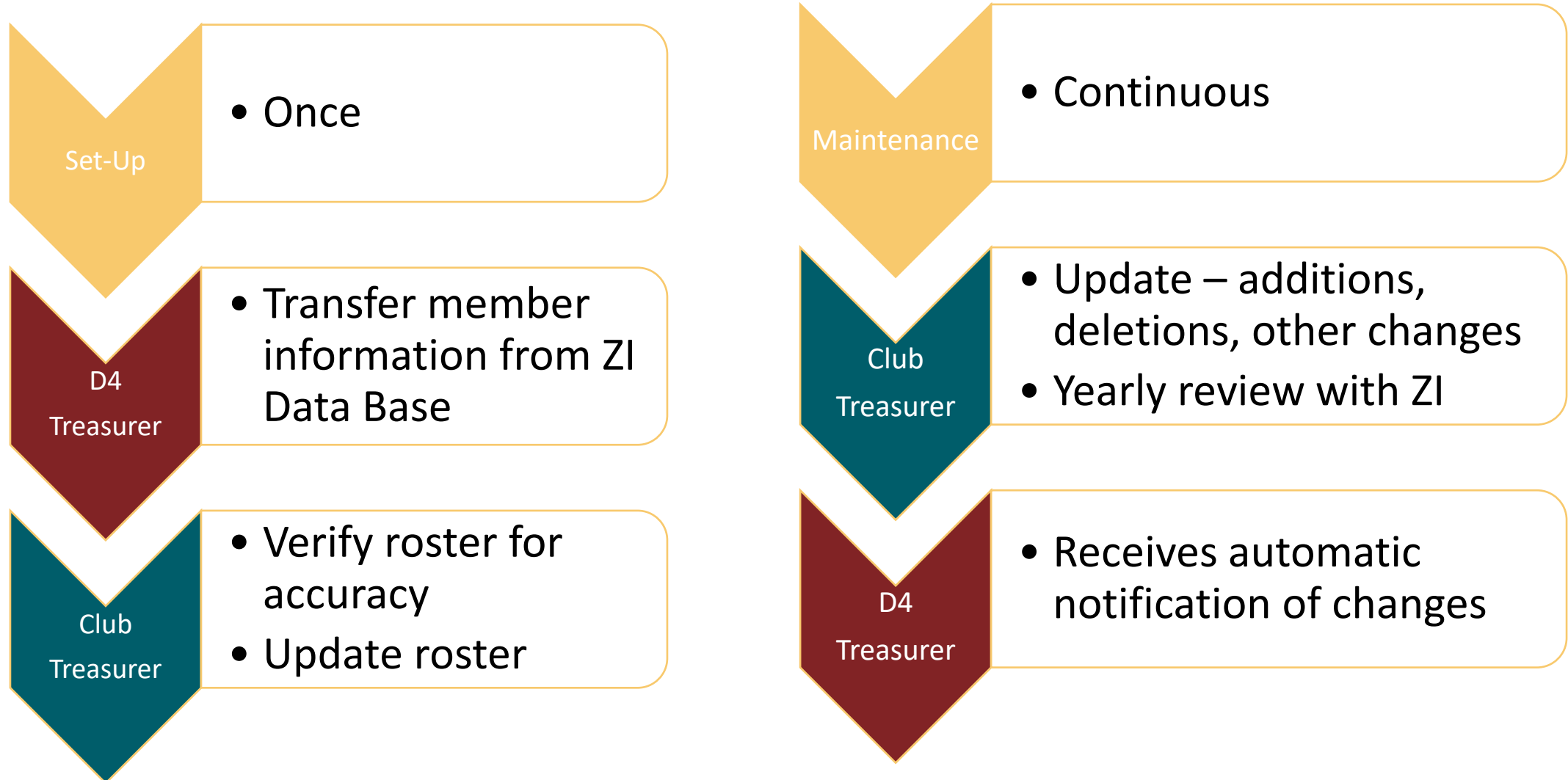
Add new channels

[illegible]

**BUILD A BETTER WORLD
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MEMBERSHIP RECORDS

Set Up & Maintenance



Membership

Current Membership Roster	Former Member Roster
Club Number Club Area Name	Name
Email Address	Email address
Type of Membership	Type of Membership
Payment Period	Date
Comments ex. New, changes such as name, email	Action Comments

Club Membership Roster

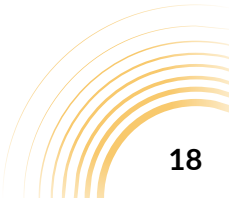
			XYZ Club			Membership Roster			2024	-2025	
No.	Club No	Area	First Name	Last Name	Member Type	Email Address	Full Year 4/1/24 5/31/25	Full year 6/1/24 5/31/25	Half year 12/1/24 05/31/25	Comments	
1	195	3	Katharine	Adams	YP	adams@gmail.com					
2	195	3	Margaret	Gleeber	CM	glee1@gmail.com					
3	195	3	Mandy	Homer	CM	manh@aol.com					
4	195	3	Samatha	McCarthy	CM	mac2@gmail.com					
5	195	3	Nancy	Pheasant	CM	nanc4@aol.com					
6	195	3	Allison	Ponder	CM	pond3@gmail.com					
7	195	3	Sheena	Pendelton	CM	spend@aol.com					
8	195	3	Roxy	Romer	CM	rock@aol.com					
9	195	3	Rubelyn	Steiner	CM	stein@gmail.com					
10	195	3	Holly	Trimble	CM	trimble@gmail.com					
11	195	3	Josetta	Zack	CM	zack@verizon.com					

Club Membership & District Dues

XYZ Club Membership Roster										
No.	Club No	Area	First Name	Last Name	Member Type	Email Address	Full Year 4/1/24 5/31/25	Full year 6/1/24 5/31/25	Half year 12/1/24 05/31/25	Comments
1	195	3	Katharine	Adams	YP	adams@gmail.com		x		
2	195	3	Janice	Doone	CM	Doone@aol.com		x		Transfer from ABC
3	195	3	Margaret	Gleeber	CM	glee1@gmail.com		x		
4	195	3	Samatha	McCarthy	CM	mac2@gmail.com				
5	195	3	Nancy	Pheasant	CM	nanc4@aol.com		x		
6	195	3	Allison	Ponder	CM	pond@aol.com		x		
7	195	3	Sheena	Pendelton	CM	spend@aol.com		x		
8	195	3	Roxy	Romer	CM	rock@aol.com		x		
9	195	3	Rubelyn	Steiner	CM	stein@gmail.com		x		
10	195	3	Josetta	Zack	CM	zack@verizon.com		x		
11	195	3	Cindy	Zimmer	YP	cindy1@aol.com	x			New

Former Club Members

					FORMER MEMBERS				
No.	Club No	Area	First Name	Last Name	Member Type	Email Address	Date	Action	Comments
4	195	3	Mandy	Homer	CM	manh@aol.com	5/31/25	Resigned	Moved out of area
11	195	3	Holly	Trimble	CM	trimble@gmail.com		Resigned	No longer interested



Club Dues Payments

			Annual District Dues Payment						
			2024-2025						
		Annual Dues - payable by June 1, 2024							
Number of Members by Type				Dues Amount		Total Number	Total Payme	Payment Made by	
Current Memb	New Member	Re-Instatemen	Transfer from	Full year 4/1/24	Full year 6/1/24 5/31/25			Check	Credit Card
9	1		1	\$23	\$23	11	\$253		x
		District Dues Paid After Annual Dues							
Date"	Number of Members by Type			Dues Amount		Total Number	Total Amount	Payment Made by	
				Full year	Half Year				
	New Member	Re-Instatemen	Transfer from	6/2/24 - 5/31/25	12/1/24 5/31/25	Total Number	Total Payment	Check	Credit Card
				\$23	\$13				
				\$23	\$13				
				\$23	\$13				
				\$23	\$13				
				\$23	\$13				
				\$23	\$13				
If paying by credit card, an invoice will be sent to you directly from PayPal.									
Make sure you send your notification to Zontadues@gmail.com									
If paying by check or money order make payable to Zonta International District 4									
Mail payments to; Zonta D4 Treasurer, PO Box 111, ABC Town, NY 11100									



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CLUB LEADERSHIP

CLUB LEADERSHIP

Identifies Club Leadership

Contact Information
Current
Former

Other Club Information

Foundations
Incorporated
Social Media

Club Name:	Zonta XYZ Club		
	Club Leadership Information		
	2024-2025		
Position	Name	email	Phone
President	Sheena Pendleton	spend@aol.com	555-555-5555
Vice President	Roxy Romer	rock@aol.com	555-555-5555
Treasurer	Josetta Zak	zack@verizon.com	555-555-5555
Secretary	Janice Doone	doone@aol.com	555-555-5555
Chair, Advocacy	Katharine Adams	adams@gmail.com	555-555-5555
Chair, Membership	Margaret Gleeber	glee1@gmail.com	555-555-5555
Chair Service	Samatha McCarthy	mac2@gmail.com	555-555-5555
	2023-2024		
Position	Name	email	Phone
President	Sheena Pendleton	spend@aol.com	555-555-5555
Treasurer	Josetta Zak	zack@verizon.com	555-555-5555
Does the club have a foundation?	no	If yes, provide date of foundation	
Is the club incorporated?	no	If yes, Date Incorporated	
	Club Social Media Information		
Position	Name	email	Phone
Webmaster	Nancy Pheasant	nanc4@aol.com	555-555-5555
Club website address	www.zonta.xyz		
Club email		xyz@gmail.com	
Facebook	N/A		
List any other social media account and addresses			None



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CLUB RISK ASSESSMENT

Risk Assessment

Work processing and Informational tool for risk used to:

- Identify areas of risk to club
 - Utilizing a point system based on 5 risk types
- Develop strategies and record plans for correction, prevention and retention
- Roll up club information to District level to develop district-wide strategies or provide assistance and/or training to clubs

			Zonta D 4 Risk Management Matrix				
Type: Governance Risk							
No.	Factor	High Risk points 3	Medium Risk points 2	Low Risk point 1	Impact Points	Date	Comments
1	Club Bylaws	Club does not have bylaws in place or have not been updated in last three years	Club has bylaws in place and they have not been updated since last convention	Club has bylaws in place and have been updated since last convention			
2	Rules of Procedures	Club does not have rules of procedures in place	Club has rules of procedures in place but have and were updated in the last biennium	Club has rules of procedure and were updated in the current biennium			
3	Internal Controls	Club does not have written internal controls in place and club manual	Club has some written internal controls in place but are may not be up to date since the last biennium, including a club manual	Club has current written Internal procedures and club manual which are up to date in the current biennium and are being followed			
4	Responsibilities of Officers, Directors & Committee Chairs	Responsibilities are not included in a Internal Controls Manual	Club has responsibilities in a written control manual for but not all include all positions, i.e. Officers, Directors and Committee Chairs	Club has responsibilities in a written control manual which inclusion but not all include all positions, i.e. Officers, Directors and Committee Chairs			
5	Minutes of Meetings	Club does not have minutes of meeting, including club, board and committee	Club maintains minutes of some meetings but not all	Club maintains minutes of all meetings which are communicated to the membership and maintained in the Club achieve			
6	Conflict of Interest	Club does have a conflict of interest policy	Club has conflict of interest policy which is not current or signatures are not being received	Club has a conflict of interest policy which is updated each biennium and signatures are obtained			
7	Succession Planning	Club has no succession plan	Club has a succession plan which has not been implemented	Club has a current succession plan and it is being following			
8	Club Assets	Three is no Internal Control Manual to provide for for handling club assets	Internal Control Manual provides limited information on the handling of club assets	Internal Control Manual stipulates all integral procedures for handling club assets and is being followed			
9	Risk Manager	Club does not have a risk Manager	Club has appointed a risk manager	Club has a risk manager and ensures risk analysis is completed annual			
Subtotal							

	RECAP					
Area	Score	Risk Value High/Medium/Low				
Governance						
Operational						
Financial						
External Risk						
Compliance/Statutory/Reputation						
If a club has over \$50,000 in assets add 1 point						
Total						
Action Plan						
Identify the risk types & factors that received the highest impact scores attained the highest impact scores						
or need to a be addressed to prevent further risk						
Risk Type	Risk Factor	Proposed Action				
Request for Assistance from District or Area Director to address specific risks identified.						

Investment

Development vs. Benefits

???

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CREATING YOUR OWN



Annual Dues

Step 1 - Review the current membership list

- 1) Update any current member changes (ex. name, email, etc.) and note in comments.
- 2) Check the box in the "Annual Dues" column for all renewing members.
- 3) Add any new members completing all boxes including their join date.
- 4) Remove any members that are no longer with the club and transfer their information into the "Former Members" section below.
Provide the date and action for their leaving, such as resigned, transfer, death or other. Provide a reason, if known.
- 5) Your club membership roster should match the information you just reported to Zonta International.

Step 2 - Complete the Annual Dues Payment Section

- 1) Count the number of members and report by type (Current, New, Reinstated, or Transfer).
- 2) Provide total number of members and multiply by \$23 to calculate the total payment.
- 3) Check the box for your method of payment (Check or Credit Card)

>> If paying by credit card, an invoice will be emailed to you from PayPal.

If paying by check or money order, make check payable to Zonta International District 4
>> and

mail to Zonta Club or District Address

Step 3 - Notify the Club or District # Treasurer at email address. Please advise # of members and method of payment.

Members Joining After June 1st

Step 1 - Add new members

- 1) Complete all of the boxes, including name, member type, email and join date.
- 2) Check the box in the New Members Columns for full year or half year dues based on the join date. Members joining from June 1 to November 30 pay full year dues. Members joining December 1 through March 31 pay half year dues. Members joining in April or May of 2026 pay full-year dues with annual dues for 2026-2027.

Step 2 - Complete the Dues Paid After Annual Dues Payment Section

- 1) Provide the date you are reporting new members. Count the number of members and report by type (New, Reinstated, or Transfer).
- 2) Calculate the amount due based on the Join Date.
- 3) Check the box for your method of payment (Check or Credit Card)
 - >> If paying by credit card, an invoice will be emailed to you from PayPal.
 - >> If paying by check or money order, make check payable to Zonta International District 4 and mail to Zonta Club or District #, Address

Step 3 - Notify the Club or District 4 Treasurer at email address. Please advise # of members and method of payment.

Members Leaving After June 1 - Report Throughout the Year

- 1) Remove any members that are no longer with the club and transfer their information into the "Former Members" section below.
Provide the date and action for their leaving, such as resigned, transfer, death or other. Provide a reason, if known.
- 2) Notify the Club or District # Treasurer at email address.

District or Club Roster

* Member Type: CM-Current; NM-New; RM-Reinstated; TM-Transfer								New Members AFTER June 1			
** Members who join in the last two months of the year pay full year dues effective through 5/31/2026.							Annual Dues		Select One		
No.	Club No.	Area	First Name	Last Name	Member Type*	Email Address	Full Year		Join Date	Join Date	Comments
							4/1/25**-5/31/26	Join Date	6/1/2025-11/30/25	12/1/25-3/31/26	
1											
2											
3											
4											
5											
6											
7											
8											
9											
Former Members											
No.	Club No.	Area	First Name	Last Name	Member Type	Email Address	Date	Action	Reason		
1											
2											
3											
4											
5											
6											
7											
8											
9											

Annual Dues Payment

Number of Members by Type				Dues Amount		Total Number of Members	Total Payment	Payment Type (check ONE)	
Current Member (CM)	New Member (NM)	Re-Instated Member (RM)	Transfer from another Club (TM)	Full year 4/1/25**-5/31/26	Full year 6/1/25-5/31/26			Check	Credit Card

District Dues Paid After Annual Dues (After June 1)

Date	Number of Members by Type			Dues Amount		Total Number of Members	Total Amount	Payment Type (check ONE)	
	New Member (NM)	Re-Instated Member (RM)	Transfer from another Club (TM)	Join Date 6/1/25 - 11/30/25	Join Date 12/1/25 - 3/31/26			Check	Credit Card