



## Appendix 11

### Zonta International Foundation and Zonta Funds

By the mid-1980s, Zonta International had become “the army of experts” Marian de Forest had envisioned, working for women and with women for their own advancement. In these years, Zonta began to prepare for its future viability to fund its expanding international service projects. In 1984, the Sydney International Convention passed a resolution authorizing the establishment of the Zonta International Foundation.

Zonta Funds existed before the Zonta International Foundation was established. (See below for a list of Zonta Funds, including Funds from 1923-85.)

#### **Zonta International Foundation (ZIF) 1985**

On 15 January 1985, ZIF was incorporated under the General Not for Profit Corporation Act in the State of Illinois, USA.

- **Purpose**

The purpose of ZIF is to carry out the charitable service of Zonta International – to raise and oversee the funds used to support and promote the global service programs of the organization.

- **Member**

ZIF has only one member, Zonta International, designated the Corporate Member. The 1996 ZIF Bylaws (Article III Sec.2) explain that the Corporate Member must approve the following actions by the Foundation Board of Directors: amendment or restatement of the Articles of Incorporation or Bylaws; merger, consolidation, dissolution, or sale, lease, exchange, mortgage, or pledge of substantially all the assets of the Foundation; and any other action for which Membership action is required under the Illinois Not-for-Profit Corporation Act.

- **ZIF Board of Directors**

The ZIF Board of Directors had 9 members: two ex- officio directors (Zonta International President and President-elect) plus seven Directors, elected by the Corporate Member (=Zonta International Board) and the ZIF Executive Committee. The ZIF officers were the ZIF President, ZIF Vice-president and ZIF Treasurer elected by ZIF Board from among the seven Directors elected by the Corporate Member.

Except for the President and President-elect of Zonta International, the term of Director was four years, with no succession.

- **The responsibilities of ZIF Board of Directors**

- To administer international service funds in accordance with purposes of ZIF and in compliance with ZI and ZIF Bylaws, Policies and Procedures, and Convention action with accountability to the ZI Board of Directors
- To manage properties
- To adopt Foundation Policies and Procedures
- To prepare and disseminate information regarding the purposes of ZIF and to prepare forms for contributions
- To develop, review and revise ongoing programs and to recommend additional ZIF sponsored service projects, and promote programs and projects among clubs and to assist clubs in implementing them
- To review annually all ZIF sponsored programs and their administration (source The Zontian Feb./March 1986 p.6)

- **The responsibilities of ZI Board of Directors**

- To elect ZIF Directors in accordance with the ZIF Bylaws
- To approve Policies and Procedures adopted by the ZIF Board of Directors
- To approve administration of restricted funds
- To approve the Biennial operating and unrestricted service budgets of ZIF
- To approve of ZIF-sponsored and recommended service projects for Convention action and provision for their administration
- To review all Foundation-sponsored projects annually (source The Zontian Feb./March 1986 p.6)

- **ZIF Board Secretary and ZIF Executive Director**

The Secretary to the ZIF Board was the Executive Director of ZIF who was appointed by the President with the approval of the ZIF Board of Directors

- **ZIF Committees**

ZIF had three standing committees: Finance Committee, Development Committee and Program Monitoring Committee.

- **Contact between ZI Board of Directors and ZIF Board of Directors**

The two boards worked together to raise the funds for Zonta International's service projects, but under United States Internal Revenue Codes, ZIF is financially responsible for the actual funds. ZIF is a 501(c)3 charitable (i.e., contributions are tax deductible to US taxpayers) non-profit corporation and ZI is a 501(c)4 non-profit corporation under the US tax code. Reporting requirements for ZIF are much stricter than for ZI. Yearly reports to the US Internal Revenue Service are prepared with the assistance of outside auditors.

ZIF was responsible for the upkeep and maintenance of the Zonta Headquarters building purchased in its name in December 1986.

The ZIF President reported at International Board meetings and maintained contact with the International President during the interim months. Pertinent information was shared with both Boards. Whenever the Boards were meeting at the same location and approximately the same time, a joint meeting was scheduled to discuss mutual areas of

concern (ZIF President Luella M. Hoffman, *The Zontian* 1996-98 Biennial Issue Four, p. 4).

After a crisis in 2008 caused by the sale of the World Headquarters Building, the ZIF Bylaws were changed, which meant that Zonta International Board became the ZIF Board. (See below.)

### **World Headquarters Building**

Recognizing Zonta's continuing growth and the leadership role of the organization in international service and the advancement of women, delegates at the 1986 Toronto convention passed a resolution to purchase a World Headquarters Building. The rationale was as follows. Since 1979, Zonta International headquarters had been located at 35 East Wacker Drive. In 1985, Zonta was informed that at the expiry of its lease in 1987, the annual rent for its offices would be increased by a minimum of 47 per cent from USD\$150,000 to USD\$220,000. The ZI Board appointed a property search committee, which reported that Zonta had paid USD\$550,000 in rent in eight years of occupancy and it would prove more fiscally viable to own a building than renting space.

On December 31, 1986 ZIF purchased the building at 557 West Randolph Street, Chicago, Illinois, USA, which became Zonta's headquarters until the latter half of 2008.

The building erected 1855 was one of only two downtown buildings which had survived the Chicago fire of 1871. It was built for Henry Horner & Co, Wholesale Grocers and Flour Dealers. In 1924, the building was sold to Pentecost Brothers, fish purveyors; the firm occupied the building until 1983.

After a USD\$1.7 million renovation, the Ribbon Cutting and Dedication Ceremony was held on 12 October 1987.

In addition to meeting facilities for Zonta International and ZIF Boards and committees the building was able to serve the meeting-space needs of local Zonta clubs, as well as various non-governmental organizations in the Chicago area. In the office rooms were the Zonta International and ZIF administrations. Furniture and decor were donated by Zonta clubs; particularly the Asian clubs which made substantial donations

The reconstruction of the building was not finished by Ribbon Cutting day, it was a huge and expensive business, Zonta International Board and ZIF Board did not agree to the sum presented to them by the contractors, and it took some time until an agreement was negotiated in 1991.

The June/July/August issue of *The Zontian* in 1991 carried this account:

After a prolonged and expensive court debate, we were able to settle. Zonta International Board and the ZIF Board discussed the issues at their January/February Board meetings. The Foundation Board authorized a settlement offer to the contractor of USD\$250,000 (versus his request of approximately USD\$500,000) including about

USD\$75,000 that we were withholding pending the outcome of the lawsuit. Our calculations indicated that this amount was probably where the arbitrator would rule, and to continue the lawsuit would cost about the same amount in legal and court fees. The offer was accepted, and the Foundation's expenses amounted to USD\$175,000 plus legal fees. Under the circumstances, this is a good outcome. We believe our resolute defense and the basic logic in our case played the major roles in the contractor's acceptance of a much smaller settlement than he had requested.

The best news, however, is that the settlement allows us to spend our time on building the Foundation and carrying out Zonta's business. Presently, in the Building Fund account, we have our building which is appraised at approximately USD\$2 million, furnishings valued at about USD\$250,000 and a mortgage balance of just under \$USD800,000 (As of March 31, 1991). Building Funds contributions are now particularly welcome as they can be applied directly to the mortgage, if so requested. Zontians throughout the world have been very generous, and they have a quality investment and a headquarters building worthy of their stature. Our task now is to provide international service programs which make our other efforts worthwhile.

### **Accumulated service funds**

In 1986 at the International Convention in Toronto, the convention delegates directed the International Board, together with the ZIF Board, to consider and propose possible uses for the excess accumulated service funds (approximately USD\$220,000) and to develop plans. President-Elect Ruth F. Walker was asked to serve as chairman of a committee charged with this task.

In 1988, the proposal developed by the committee was presented at the Helsinki Convention as a Resolution on Excess Service Monies. The committee proposed that the funds be divided and used in three ways:

- USD\$100,000 to go in a ZIF Service Reserve Fund to meet future commitments when contributions fall short
- USD\$50,000 to be used to fund small projects through UN agencies
- Approximately USD\$70,000 to be used to establish an Endowment Fund, with the interest generated from this Fund going towards future service projects.

It had been suggested that a Zonta Disaster Fund be established. The committee did not support this suggestion, proposing instead that, in the event of a disaster, the district governor of the affected area notify the International President regarding the needs of the victims and the ways contributions can be made (Message from International President Amey E. Grubbs, 1 March 1988, March mailing to clubs).

### **The mortgage**

By 1992, regular payments had been made on the mortgage since 1988 including one lump sum payment of USD\$100,000. However, as of January 1992, a mortgage of USD\$770,000 and

a deficit of USD\$150,000, due primarily to legal costs, still remained (*The Zontian*, March/April/May 1992, p. 12).

The next edition of *The Zontian* reported the start of “a capital campaign to be concluded at Zonta’s 75th birthday celebration at the 1994 convention in Detroit, Michigan, USA”. The goal was to pay off the mortgage in full (*The Zontian* June/July/August 1992, p. 26).

### **1996: The World Headquarters Property Preservation and Improvement Fund (WHPPI)**

By this year, the property was debt-free, and ZIF was responsible for the upkeep and maintenance. Given its tax status, ZIF realized annual savings of approximately USD\$10,000 in real estate taxes by maintaining the title to the property.

Following the repayment of the loan on the property in February 1996, The World Headquarters Property Preservation and Improvement Fund (WHPPI) was established to separate ZIF’s investment in plant and equipment and payment of long term debts from the operating assets of the General Fund (depreciation expenses and interest on the long-term debt were recognized in this Fund).

The establishment of WHPPI also allowed clubs and individuals to contribute funds to maintain Zonta’s historic property (*The Zontian* 1996-98, Biennial Issue Four p. 4).

### **District Foundation Ambassadors**

**1998:** The first District Foundation Ambassadors were appointed. Governors appointed the Ambassadors whose job was to market ZIF in their respective districts.

### **Decision to sell the headquarters Building**

During the biennium 2006-08, the Zonta International and ZIF boards of directors decided to put the property on sale and find new office premises.

The implementation of this decision caused a deep crisis in the organization. In 2008, at Convention in Rotterdam, it was obvious that there were problems. The ZIF Board of Directors had bought new offices at East Wacker Drive, downtown Chicago. Zonta International President Beryl Sten and President-elect Dianne Curtis had not approved this decision and as a consequence, dismissed the ZIF Board of Directors in the autumn of 2008 and the Executive Director in 2009. Moreover, ZIF Bylaws were amended, which meant the Zonta International Board from 2009 was also the ZIF Board. (See below.)

As the Zonta International Board of Directors did not want to move into the premises at East Wacker Drive, they rented new offices in a high rise in Oak Brook, near Chicago. The premises in East Wacker Drive were put up for sale and sold after some time.

The dismissal of the ZIF Board in 2008 caused deep concern for many Zontians, as members of the Zonta International Board 2008-2010 were not in a position to share information until the

crisis had been resolved. Despite this, the Foundation Ambassadors working with their districts were able to achieve 99 per cent of the goal for the biennium.

The reasons for the crisis were many: first, lack of communication between the Zonta International Board and ZIF Board, but also different understanding of the competencies of the two boards, different understanding of what had happened, different understanding of where the offices should be and different understanding of the office space that was needed.

## **2009**

ZIF Bylaws were amended. According to 2010 ZIF Bylaws article XV, the Board of Directors has the power to amend the Bylaws at a regular or a special meeting. The Zonta International Board became the ZIF board in 2009 after the termination of the original ZIF board. ( For ZIF Board and Committees see Appendix 13.

At the North American Inter-district Meeting in Cleveland Ohio, the District 06 Foundation Ambassador, Jackie Beaudry, was appointed chairman of the Development Committee for the remainder of the biennium.

In June, the Zonta International Board invited Zontians to attend the “Ribbon Cutting Ceremony” for Zonta’s new headquarters at 1211 West 22nd Street, Suite 900, Oak Brook, Illinois, on Saturday 20 June 2009.

In August 2009, in a letter to the Foundation Ambassadors , Zonta International President (2008-10) Beryl Sten wrote:

The World Headquarters Building on Randolph St was sold in April 2009. The office condominium on Wacker St is for sale and is not Zonta headquarters. Therefore, there is no longer a need for the WHPPI Fund (World Headquarters Property Preservation and Improvement Fund). The WHPPI Fund will be removed from the contribution form and we are no longer encouraging contributions to the WHPPI Fund. Once Wacker has been sold, the WHPPI Fund will be closed and we do not wish to have money in a fund that cannot be used to advance the status of women (letter from Beryl Sten to Foundation Ambassadors 24 August 2009).

## **Convention 2010:**

Able at last to share information with districts, clubs and Zonta members, the Zonta International President included these remarks in her report to the 2010 International Convention:

The last two years have presented numerous challenges for Zonta; however, meeting those challenges has given us the opportunity to evaluate our operations and improve efficiencies, making us better equipped to focus our time and resources on our mission to advance the status of women worldwide.

The sale of the building at West Randolph Street was effected before the 2010 convention. The price was USD\$2,050,000, a reasonable price in a falling market. It is relevant to mention that the new headquarters offices cost the organization USD\$100,000 less in rent per year than the

old building and travelling expenses from O'Hare airport to Oak Brook are less than the transportation expenses to the old headquarters Building in downtown Chicago.

### **2010: Amended ZIF Bylaws**

The amended ZIF Bylaws were published in the Governing Documents 2010 p.58–64.

- **Member**

Zonta International and ZIF are still two different organizations; each one with its own Bylaws. Zonta International is still the Corporate Member of ZIF.

- **ZIF Board of Directors**

Members of Zonta International Board are elected at Zonta International Conventions for a two-year term. The Directors of the ZIF Board *“shall be those individuals serving from time to time as officers and directors of Zonta International” (2010 ZIF Bylaws Art. IV section 2)*

A regular meeting is held in the month of June in conjunction with the meeting of the Corporate Member. Regular meetings will be held without other notice than by Board decision. Meetings may be by conference call or by electronic messaging. *(2010 ZIF Bylaws Art. IV section 7)*

- **ZIF Officers**

The officers are, a President, a President-elect, a Vice-President and a Treasurer/Secretary. The individuals holding these offices from time to time in the Corporate member shall hold the same offices in the Foundation. *(2010 ZIF Bylaws Art. V, sec 1)*

- **Executive Committee**

The officers of the Foundation shall constitute the Executive Committee *(2010 ZIF Bylaws Art. VI, sec 1)*

- **Committees**

The 2010 ZIF Bylaws mention two Standing Committees, Finance and Audit Committee (from 2014, Finance, Audit and Risk Committee) and Development Committee. 2012, an Investment Committee was added, and 2018 an Endowment Committee.

Other committees may be appointed by the president; members of these committees may be selected from outside Zonta International Board. *(2010 ZIF Bylaws Art. VIII, IX)*

### **2012 Amended ZIF Bylaws**

- **Foundation Ambassadors**

The first Foundation ambassadors were appointed in 1998. The Ambassador's primary role is to promote ZIF in the district through methods most appropriate for each district. They were not mentioned in the Bylaws until 2012 when their role was described as follows in Article VI:

Each District shall have a least one Foundation Ambassador appointed by the governor. They shall educate club members about the International Service and ZISVAW projects and education programs of Zonta International. They shall encourage clubs to make donations to the Foundation and encourage individual members to consider personal gifts to the Foundation.

## **Zonta Funds 1923–1984**

### **General**

Article III, Section 5 of the Zonta International Bylaws in 1939 describe the duties of the Treasurer:

The Treasurer shall receive from the Secretary all funds paid in and shall deposit them at such banking institutions as may be designated by the International Board of Directors; disbursing them by the order of the Board. She shall make a report at the International Convention or more often if required by the Board of Directors. At all times, her accounts and books shall be open to inspection of the Board, the President or any auditors named by the Board. She shall give bond for the faithful performance of her duties in an amount fixed by the Board of Directors.

Article XIII, section 7 of the revised Bylaws in 1954 had the following provisions with regard to funds:

Except as otherwise designated in these bylaws, the income of Zonta International shall be deposited in the General Fund, which shall be used for current expenses and maintenance of Zonta International headquarters and for such other expenses as shall be authorized by Zonta International or the International Board. Disbursements from this fund shall be made only by check upon presentation of vouchers as authorized by the Board.

Section 8 added:

The International Board may cause to be set aside a petty cash fund not to exceed two hundred dollars, which shall be used for small items of current office operations. This fund shall be reimbursed periodically upon presentation of paid vouchers in the same manner as required for other expenses.

**1923: Service Project Fund:** The first international service project dates from 1923, when the Confederation of Zonta clubs endorsed the work of Near East Relief in its efforts to care for 115,000 orphan children and women in Smyrna, Turkey.

### **1929: 10th Anniversary Fund**

Zonta International President (1928-29) Katherine B. Sears asked members to donate USD\$3.00 for national and USD\$10.00 for organizing clubs internationally.

### **1931: Foundation Fund**

The 1930 convention body in Seattle recommended the establishment of a Foundation Fund. This was established in 1931 (*The Zontian*, October 1934, pp. 7-8).

### **1935: The Marian de Forest Memorial Fund**

Marian de Forest died in 1935. To preserve the memory of her as a driving force in the early growth of Zonta, the organization established the Marian de Forest Memorial Fund for Organization and Rehabilitation of Clubs. This Fund received voluntary donations until 1947,

when it became mandatory for all clubs to pay a fee of USD\$1.00 per capita per year, increased in 1980 to USD\$2.00 per capita. The fund was able to receive voluntary donations.

### **1938: Amelia Earhart Scholarship (later Fellowship) Fund**

Zonta International established the Amelia Earhart Scholarship Fund in honor of Amelia Earhart, aviator and Zontian.

1954 Zonta International Bylaws Article XIII, Section 9 described the fund as follows:

The Amelia Earhart Scholarship Fund shall consist of voluntary contributions from clubs and gifts from other sources. One or more scholarships to be known as "Amelia Earhart Scholarship" may be awarded annually from this fund. The Amelia Earhart Scholarship Fund shall be designated as an "International Service Project of Zonta International".

### **World War II: War Service Fund**

During World War II, Zonta cooperated with government agencies and bureaus, and other national and international organizations such as the Federal Treasury Department, Office of Civilian Defense, National Safety Council and several others. Zonta International President J. Winifred Hughes (1942–44) urged Zontians to contribute to the United States War Service Fund and the Red Cross, and to sell war saving stamps and bonds, for which Zonta eventually received two special commendations from the United States Department of the Treasury.

**1946:** The Convention body voted to return Zonta's service program "to the original broad plan of education and constructive work for girls and young women". Zonta's International Board voted to include support of UN activities in Zonta's policy for 1946–47.

### **1956: Zonta Fund for Hungarian Patriots**

Zonta International increased its international service involvement with the "Zonta Fund for Hungarian Patriots", which provided food, shelter, and classes in English for immigrant refugees.

### **1960–62: Zonta Fund for the Anne Frank Village in Wuppertal, Germany**

Zonta International's service project was the Anne Frank Village in Wuppertal, Germany, which provided for the rehabilitation of about 1,000 homeless refugee families.

### **1961: Emma L. Conlon Fund**

The Fund was established to support awards for Z Club service. (Since the establishment of ZIF the awards have been financed by Zonta International, not ZIF)

### **1962: The Eva Mowbray Hostess Fund**

The Eva Mowbray Hostess Fund was established in 1961 by District V in honor of Eva Mowbray of London who had hosted many visiting Zontians in her home. Zonta International President Ellen Harris adopted the idea and in 1962 proposed honoring Eva Mowbray by naming a

voluntary-contribution hostess fund for her. The fund served to fulfill in part the Zonta object “to foster the spirit of good fellowship among Zontians and Zonta Clubs”.

Eva Mowbray (1880–1966) was a London fundraiser and charter member of Zonta Club of London of which she became president in 1952. In one biennium, she was hostess to more than 800 Zontians visiting London. Her awareness of the international importance of Zonta led to her role as chairman of the International Hostess Committee.

The Eva Mowbray Hostess Fund sponsored the Ribbon-Cutting of the World Headquarters in 1987 and such events as receptions (1982) for Zontians Helvi Sipilä and Leticia Shahani, both of whom had served as United Nations Assistant Secretary-General for Social Development and Humanitarian Affairs.

The Zonta International President was authorized to decide what the money was to be used for, with the agreement of the Executive Committee. The Fund is mentioned for the last time in the International Manual in 2006.

### **1962-76: Zonta Fund for Vocational and Teacher Training Centre for Women at Ramallah, Jordan**

Zonta International cooperated closely with the United Nations Commission on the Status of Women, and the 1962 convention adopted the resolution:

We believe human dignity to be a universal necessity, and that human rights belong to everyone regardless of sex. Therefore, be it resolved that Zonta give special attention to the improvement of the economic status of women, furthering the advancement of women everywhere.

To implement the resolution, Zonta International instituted support for the United Nations Relief and Works Agency (UNRWA) for Palestinian refugees. From 1962 to 1976, Zonta funded the Vocational and Teacher Training Centre for Women at Ramallah, Jordan, the only one of ten UNRWA schools that provided vocational training for women. The project was very popular in the Nordic countries. The project was closed because it had lasted for a very long time and was in a problematic region (Mette Holst Hansen, report from District XIII Board meeting 1976, District XIII Archives).

### **1964: G.R.O.W, 45th Anniversary Fund**

Zonta International President 1964-66, Ruth S. Knight, began her presidency by initiating the international service project Growing Round Our World, and instituting the 45th Anniversary Fund to finance Zonta's expansion into new countries. The G.R.O.W. project stopped 1976.

### **1972–74: Zonta Fund for Mobile Medical Units**

Zonta's Mobile Medical Units project in cooperation with UNICEF served the health needs of children and mothers in rural areas of Ghana.

**1974–76: Zonta Fund for Pan African Training Center**

Zonta International adopted the Pan African Training Center and the African Women's Volunteer Task Force as an international service project. The project assisted women of the Task Force in bringing health care and education to mothers and children in rural and disadvantaged urban areas. The Pan African Training Centre provided apprenticeships and functioned as an information and research center.

**1976–82: Zonta Fund for Support to the Colombian Government's Health Center Project**

Zonta cooperated with the Colombian Government in building ten health centers under the Colombian Health Centers Project. The centers served rural people who had migrated to the industrial regions in search of greater opportunity.

**1982–86: Zonta Fund for the Sri Lanka Well Water Project**

At the 1982 convention, Zonta International inaugurated the Sri Lanka Well water project. In cooperation with UNICEF and in conjunction with UN Drinking Water Supply and Sanitation Decade, the project's objective was to provide strategically placed wells which supplied clean drinking water for 325,000 people in the Dry Zone Area. In 1986, at the project's completion, Zonta International had contributed USD\$880,000 for safe water wells and hand pumps.

**1982–86: Support for the United Nations Voluntary Fund for Women**

From 1982 to 1986, Zonta International provided USD\$21,000 in funds to the United Nations Voluntary Fund for Women to provide improved technologies and to refine women's skills in pottery-making, and spinning and weaving projects in Kenya. These new skills enabled women to raise their standard of living through the sale of these products. (The UN Voluntary Fund evolved to become UNIFEM.)

**ZIF Funds**

Since 1985, Zonta has been funding international service programs through ZIF.

No part of annual dues to Zonta International comes to ZIF; it is supported only by donations from individual Zontians, Zonta clubs or friends of Zonta.

The concept of giving a percentage of service contributions to Zonta's International Service Programs was instituted during the 1972–74 biennium. The idea of donating one-third (33 per cent) of club service funds to the International Service Projects came from a service recommendation adopted during the 1988–90 biennium. The 1996–98 Club Guidelines repeated this recommendation even if the 1996–98 Program Goals recommended exact amounts.

Zonta International's service and advocacy programs focus on improving the educational, health, economic, professional and political status of women.

ZIF has three groups of funds: Program Funds (Restricted Funds), Rose Fund (Unrestricted) and Endowment Funds (Long Term Investments). Donors choose which fund they want to support.

### **Program Funds (Restricted Funds)**

#### **International Service Fund**

The International Service Program addresses critical women's issues in developing countries. The Program is funded by voluntary contributions to the ZIF International Service Fund.

#### **ZISVAW Fund**

In 1995, Zonta International held a Summit on Violence against Women. Contributions from Zonta members, clubs and districts as well as from foundations, corporations and businesses funded the summit. The remaining funds were retained in ZIF's ZISVAW Fund.

The Zonta International Strategies to Eradicate Violence Against Women Program (ZISVAW) focuses on prevention, awareness, education and the development of innovative approaches to eliminating violence against women. The Program is funded by voluntary contributions to the ZIF ZISVAW Fund.

#### **Amelia Earhart Fellowship Program**

Established in 1938 as Amelia Earhart Scholarships, Amelia Earhart Fellowships support post-graduate study by women in aerospace-related sciences and engineering. The Program is funded by voluntary contributions to ZIF's Amelia Earhart Fund and Amelia Earhart Endowment Fund.

#### **Young Women in Public Affairs Award (YWPA)**

Established in 1990, this Award was initially funded by investment income from the ZIF Endowment Fund; today, it is funded by voluntary contributions to ZIF's YWPA Fund.

#### **Jane M. Klausman Women in Business Scholarship**

In June 1996, the Zonta International Board authorized establishment of a scholarship program for women studying business management. The scholarship was supported by a bequest from Past International Parliamentarian Jane M. Klausman as well as later gifts and by ongoing voluntary contributions.

#### **Michael J. Freeman Scholarships for Irish Women**

This program was established in 1988 and closed in 2004. The following article appeared in *The Zontian* of March/Apri/May 1990 (p. 6):

The Program was funded from a bequest made to the Zonta International Foundation by Irishman Michael J. Freeman.

He and his wife Nora Lynch Freeman had no children. Mr. Freeman was a businessman in New York for many years before retiring to Florida. He had an interest in assisting young Irish women to further their education, and to that end, he sought the

advice and recommendation of his attorney Elizabeth Athanasakos (a member of Zonta Club of Fort Lauderdale and Foundation director from 1985-86) It was through her recommendation to leave a bequest to a Foundation such as Zonta that the ZIF ultimately became the beneficiary under his will.

The USD\$400,000 bequest was made in the form of two buildings in New York, and arrangements for their sale was made in 1986-87. MJF's will provided that the monies "be used for a scholarship program to grant to financially needy young women who are scholastically able and who reside either in Ireland (Irish Free State) or Northern Ireland. Said scholarship shall be for educational programs after high school, either college, specialized training, vocational schooling, or continuing education.

It was Mr. Freeman's intention that the scholarships be self-supporting, and since the interest from the Fund was used for the scholarships with a small amount reinvested in the Fund, his wish has been carried out.

In March of 1988, then President-Elect Ruth Walker, International Service Committee Chairman and Foundation Director Brenda Kagle, Executive Director Valerie Levitan, and Foundation Manager Rickie Jacobs traveled to Ireland to gather information from the various educational institutions to establish a procedure for offering scholarships to Irish women.

The recommendation to the Foundation Board was to provide for two four-year scholarships at university level, one at Dublin City and one at the University of Limerick, and one one-year scholarship at the Regional Technical College, Galway. The scholarships at the universities would include tuition, examination fees, registration fees, laboratory and book fees to a maximum of USD\$2,500 per year. The one-year scholarship is for a maximum of USD\$1,200. It was further recommended that a new Scholarship recipient should be added each year so that at full implementation, four students would be receiving a scholarship at each university. Agreements were drafted between the Foundation and the universities and college to set out terms of the Scholarships, including the criteria for the selection of the scholars and the conditions for retention of the Scholarship. Each Scholarship recipient is presented with a certificate by local Zontians, and in keeping with Irish tradition, she receives a medal and a cash gift at the conclusion of her studies. Women graduating from the four-year universities receive a cash gift of USD\$250.00, and women graduating from the Regional Technical College, Galway receive a cash gift of USD\$50.00.

In June 1996, the ZIF Board revised the use of Michael J. Freeman Scholarships for Irish Women to support related academic costs since the Irish Government by then was funding tuition.

The last scholarships were awarded in 2003-2004. The ZIF Board decided to spend down the fund, noting that conditions in Ireland had changed and that the original need for the scholarships had been markedly reduced (information from Margit Webjörn to Eva Nielsen, March 2018).

## **The Building Fund**

The mortgage on the Headquarters Building was paid off in 1996.

The World Headquarters Property Preservation and Improvement Fund (WHPPI) was established 1996 and closed in 2009 (See Headquarters Building above).

## **Rose Fund**

ZIF Board decided at its meeting June 1997 to change the name of the General Fund to The Rose Fund, effective from 1998. As this fund is unrestricted, it provides the greatest flexibility in meeting the ZIF's needs for program and administrative support. It is of course, named for the Zonta Rose.

The Rose Fund is particularly important to ZIF because contributions to it are unrestricted. This means the Board of Directors has some flexibility in the use of contributions. ZIF's general management and fundraising expenses are paid from the Rose Fund. In addition, these contributions can be used for any program with a shortfall in funding; to expand existing programs; or to develop and initiate new programs.

The Rose Fund provides financial stability to ZIF. It enables ZIF to obtain the technical and human resources needed to manage and administer all funds. This in turn allows more effective use of program contributions.

## **Endowment Funds (Long Term Investment)**

A financial endowment is a donation of money or property to a not-for-profit organization for the ongoing support of that organization. In an endowment fund, the principal amount is kept intact in an investment account while the investment income is available for use. As of 2018, ZIF had two separate endowment funds: a general Endowment Fund and the Amelia Earhart Endowment Fund.

- General Endowment Fund 1988. The original establishment of the Endowment Fund was adopted at the Helsinki convention in 1988 (see above). The name was the Endowment Fund; no other name was needed, since there was only one Fund. In the biennium 1996–98 the name was changed to the General Endowment Fund
- Amelia Earhart Endowment Fund 1997. During the 1996–98 biennium, a member gave a gift to begin the Amelia Earhart Endowment fund. To make sure there was no confusion, the original fund was then referred to as the General Endowment Fund (information from Jackie Beaudry, January 2018).

## **Information and Campaigns 1985–2018**

- **ZIF's quarterly financial statements (1996)**  
June 1996, ZIF Board Agreed to send the ZIF's quarterly financial statements to the District Governors on a regular basis.
- **Foundation Ambassadors appointed (1998)**  
As chairman of the Development Committee 1997-99, Barbara Geil, Zonta Club of Detroit I, trained the first team of District Foundation Ambassadors at the Paris Convention 1998.

- **Revised Levels of Giving and Recognition Plan (1998)**

To honor the support of Zontians around the world, ZIF established a Levels of Giving and a Recognition Plan for both club and individual contributions. The Plan recognizes individual levels of giving as they accumulate from biennium to biennium (starting from the 1996-98 biennium). Barbara Geil, ZIF director 1997-99 and ZIF President 1999-2001, helped establish the policies for active promotion of planned and individual giving to ZIF (*The Zontian*, 1998-2000, Biennial Issue One). These remained in place until the 2008-10 Biennium when modifications were introduced.

|                        |                    |
|------------------------|--------------------|
| Ruby                   | USD\$75,000–99,999 |
| Pearl                  | USD\$50,000–74,999 |
| Topaz                  | USD\$25,000–49,999 |
| Opal                   | USD\$10,000–24,999 |
| Turquoise              | USD\$5,000–9,999   |
| Platinum Double Wreath | USD\$4,000–4,999   |
| Platinum Wreath        | USD\$3,000–3,999   |
| Platinum               | USD\$2,500–2,999   |
| Gold Double Wreath     | USD\$2,000–2,499   |
| Gold Wreath            | USD\$1,500–1,999   |
| Gold                   | USD\$1,000–1,499   |
| Silver Wreath          | USD\$750–999       |
| Silver                 | USD\$500–749       |
| Bronze Wreath          | USD\$250–499       |
| Bronze                 | USD\$100–249       |

- **Revised Levels of Giving and Recognition Plan (2015)**

The ZIF Board reviewed the Donor Recognition Pin Program and made changes, effective for gifts given after 1 July 2015. The revised plan provided for the following eight levels of recognition, each of which has sub-categories. The plan remained in place as at January 2020.

|         |   |                      |
|---------|---|----------------------|
| Level 1 | 11 pins – bronze, silver, gold, and platinum, and gold with turquoise | USD\$100–9,999       |
| Level 2 | 5 pins – gold with opals  | USD\$10,000–24,999   |
| Level 3 | 6 pins – gold with topaz  | USD\$25,000–49,999   |
| Level 4 | 5 pins – gold with pearls   | USD\$50,000–74,999   |
| Level 5 | 5 pins – gold with rubies   | USD\$75,000–99,999   |
| Level 6 | 5 pins – gold with diamonds   | USD\$100,000–124,999 |
| Level 7 | 6 pins – gold with sapphires  | USD\$125,000–149,999 |
| Level 8 | 6 pins – gold with emeralds   | USD\$150,000–175,000 |

- **The Mary E. Jenkins 1919 Society (1998)**

In 1998, ZIF established The Mary E. Jenkins 1919 Society, named after Zonta's first President, to honor individuals who have entrusted their legacy to ZIF through a planned

gift. Planned gifts help to ensure the future of Zonta's programs to empower women and perpetuates the ideals established when Zonta International was founded in 1919.

- **The Endowment Fund Biennial Goals 2004-06**

A very aggressive fundraising goal was adopted for 2004-2006: USD\$800,000. While the goal was not achieved, USD\$289,550 was donated and, the Endowment fund had assets in excess of USD\$900,000 at the close of the 2004–06 biennium.

The ZIF Board and Development Committee would use the 2006–08 biennium to focus on how to achieve a goal of USD\$10 million by the 100th anniversary.

In 2008, the Zonta International Convention adopted the following ZIF Board proposal:

In addition to the operational funding goals for 2008–10 biennium, in celebration of Zonta International's 100th anniversary, the Foundation proposes a USD\$10 million Endowment Fund by 2018. During the 2006–08 Biennium... The Endowment goal for 2008–10 Biennium is USD\$500,000 (2008 Zonta International Convention handbook).

- **The Centennial Anniversary Endowment Campaign (CAEC) 2013.**

Further to acceptance of the ZIF Board's proposal at the 2008 convention, the ZIF Board in 2013 adopted the title Centennial Anniversary Endowment Campaign and the abbreviation CAEC.

The CAEC was officially announced at convention in Orlando, USA, in 2014. The purpose of the campaign was to raise awareness of how Zontians could make a personal legacy gift to support Zonta's work.

In January 2015, International President Maria Jose Landeira Oestergaard and President-Elect Sonja Hönig Schough wrote to all members as follows:

The 2014–2016 ZIF Board believes our 100th anniversary is a golden opportunity to strengthen Zonta's Endowment Fund, and that the Centennial Anniversary Endowment Campaign is a step forward to ensure the sustainability and longevity of our projects and programs.

The ZIF newsletter of July 2017 included the following description:

The Centennial Anniversary Endowment Campaign is an intensive fundraising effort focusing on Zonta's 100th birthday. Through this campaign, we want to fulfill the vision of our founders. The campaign is committed to growing Zonta's endowment fund by USD\$10 million by 2020. This campaign is totally separate from our biennial funding for the international service projects and educational programs approved at convention. More than 78 Zontians and non-Zontians have given and pledged more than USD\$1.3 million during the early, so-called "quiet phase." This year, we will announce the CAEC as part of the centennial celebration at every district conference.

The CAEC Committee and our 23 regional representatives in 12 districts invite you to: BELIEVE in our cause; INVEST in the future; and EMPOWER many more millions of women and girls!

In February 2019, a policy was adopted by the ZIF Board and a separate program of recognition was established for donors to the Endowment Fund, including commemorative jewelry and other forms of acknowledgement.

|                |                        |
|----------------|------------------------|
| Peacemaker     | USD\$1 million or more |
| Change Maker   | USD\$500,000–999,999   |
| Bridge Builder | USD\$250,000–499,999   |
| Visionary      | USD\$100,000–249,999   |
| Champion       | USD\$50,000–99,999     |
| Advocate       | USD\$10,000–49,999     |
| Believer       | USD\$1,000–9,999       |

Sources:

Zonta International World Headquarters Building, Ribbon Cutting and Dedication Ceremonies, October 1987

Manual of Procedures for Zonta Clubs, 1981, revised 1989

De Langis, *A History of Zonta International 1919-1999*

District XIII archives

The Zontian

ZIF Bylaws

ZIF Annual Reports

Information supplied to Eva Nielsen in 2018 by Margit Webjorn, Jackie Beaudry and Gro Ramsten Wesenberg.