

STATUS REPORT August 2020

Greater Kirkland Chamber of Commerce & Kirkland Chamber Foundation

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TABLE OF CONTENTS

PRESIDENT'S NOTE	3
PURPOSE	3
STAFF & BOARD OF DIRECTORS LIST	4
NEW KIRKLAND CHAMBER FOUNDATION	5
MEMBERSHIP SUMMARY	6
NEW MEMBERS	6
COVID-19 PIVOT	6
GROWTH PLAN	6-7
REGIONAL VIABILITY	7
WELCOMING NEW BUSINESSES	7
NETWORKING	8
SPECIAL EVENTS	9-10
PARTNERSHIPS	11
OUTREACH	11-12
COMMITTEES	13
AMBASSADORS	13
EDUCATION/KIRKLAND PROMISE	13
EVENT COMMITTEES	13
PUBLIC POLICY	13
YOUNG PROFESSIONALS	13
ADVOCACY	14
CITY/LOCAL	14
STATE/COALITION	14
FEDERAL	14
FINANCIAL SUMMARY	15
YTD INCOME/EXPENSE CHARTS	15
CURRENT BALANCE SHEET	16
ORGANIZATIONAL MANAGEMENT	17
HIGHLIGHTS	17
LOOKING AHEAD	17
2020 SPONSORS	18-19

PRESIDENT'S NOTE

This is certainly a time like none other in our lives. The COVID-19 pandemic continues to produce uncertainty and stress in our community. Despite the challenges we are all facing every day, this is also a time that is bringing out the best in so many people. On behalf of the Kirkland Chamber, we are incredibly thankful to all of those serving and caring for those in need and the Kirkland Chamber is proud to play a critical role in this fight by continuing to support the needs of the business community.

It is our goal to continue to support the businesses that make our community such a desirable place to live. We have made huge strides towards this goal and all of the continued support and loyalty from our amazing Chamber Members, as well as the partnerships with the businesses in our community that have been willing to roll up their sleeves and get in the fight with us, has been the key to our success.

When the pandemic erupted, the Chamber took immediate steps to lead the effort of supporting the businesses of Kirkland and beyond, and every day we are committed to continuing to fight. Like everyone reading this, this is an ongoing fight for us all, and rest assured, we will not stop until we are on the other side of this pandemic. With all the progress our community is making towards adjusting to our new normal, we have confidence we will succeed.

As the largest Chamber on the Eastside supporting businesses for what is now 101 years, I believe there has never been a better example of how critical the Chamber is to our community that so many of us call home. The strength, restless sacrifice, compassion around us, and the level to which our community has come together through this pandemic has been extraordinary and inspiring. Because of this, we will emerge from this much stronger and more resilient in the future.

We are all in this together. The Kirkland Greater Chamber of Commerce will continue to be here to support you and I encourage you to reach out at any time. In the meantime, please stay safe and healthy, and thank you again for your loyalty and commitment and all you are doing to be the difference in the fight to reduce the spread of COVID-19 to save lives.

With respect and gratitude,

Amy Mutal, 2020 Kirkland Chamber President

STATUS REPORT PURPOSE

The purpose of this semi-annual status report is to keep the members of the Greater Kirkland Chamber of Commerce informed of our activities, progress, and health of the organization. We value each and every member of our Chamber, and aim to keep you as informed as possible. Our commitment to transparency means that we are constantly trying to find new ways to bring information to our membership about how we operate and our goals for the future. We welcome your feedback.

STAFF

CHIEF EXECUTIVE OFFICER

Samantha St. John

VICE PRESIDENT, SALES & MARKETING

Beth Gale

OPERATIONS & FINANCE MANAGER

Jennifer Dean

MARKETING & EVENTS COORDINATOR

Katie Miller

BOOKKEEPER

Diana Lynn

BOARD OF DIRECTORS

PRESIDENT

Amy Mutal, Prevail Wealth Management

VICE PRESIDENT/2019 PRESIDENT-ELECT

Debbie Leviton, Caliber Home Loans

PRESIDENT EMERITUS

Kevin Hansen, Livengood Alskog

TREASURER

David Bander, Kirkland Performance Center

SECRETARY

Anne Hess, Kirkland Living Magazine

VP, EVENTS

Alicia Quaco, Overlake Hospital

VP, MEMBERSHIP

Brenda Kauffman, Columbia Athletic Club

VP, PUBLIC POLICY

Ryan James, ryan james fine arts

DIRECTORS

Beverly Glassey, XGym

Claudia Smith, Murphy Business Northwest

Cole Eckerman, Bellevue Arts Museum

Deby Rourke, Deby Rourke - John L. Scott

Elisabeth Sorensen, Lake WA Tech Foundation

Jaurdey Samuel, 425 Business Magazine

Jeff Tomlin, EvergreenHealth

Jessica Beck, Krueger Beck, PLLC

Jolene Messmer, Caliber Home Loans

Karin Quirk, Quirk Law Group PLLC

Kathy Feek, Kathy Feek Art Consulting

Kristian Uri, Fisherman's Finest

Lani Brockman, Studio East

Rich Bergdahl, RE/MAX Northwest

Stephanie Dickson, The Web Mentor

Dennis Newell, Community Volunteer (*ex-officio*)

Kurt Triplett, City of Kirkland (*ex-officio*)

Mark Shinstrom, Shinstrom & Norman (*ex-officio*)

Mary Maas, Kirkland Kiwanis (*ex-officio*)

Scott Becker, Kirkland Rotary (*ex-officio*)

KIRKLAND CHAMBER FOUNDATION (EST. 2020)

501c3 Charitable Non-Profit Organization

- In February 2020, the new Kirkland Chamber Foundation was formed. The purpose of this foundation is to support the educational elements of the Greater Kirkland Chamber of Commerce, which are charitable in nature.
- The foundation has two key pieces: The primary piece is lifespan education (pre-k until retirement) and the secondary piece is disaster relief (added in March 2020 in response to the COVID-19 pandemic crisis).
- All educational programming formerly under the Greater Kirkland Chamber of Commerce is now being produced by the Kirkland Chamber Foundation. Much of this programming will be expanded to increase our involvement with the school district and local colleges.
- A two-way mentoring program will be established in 2021. The idea is for seasoned professionals to help students with their knowledge of how to navigate a career and the work world, and then for students to help seasoned professionals with skills to stay competitive in the workforce. This type of education can help everyone in any stage of their career.
- The Kirkland Small Business Relief Fund was established as an emergency fund to help businesses and nonprofits impacted by the immediate effects of COVID-19. **This was the first relief fund of its kind in the country.** Over \$460,000 was raised from a collection of donors. Every dollar was distributed to applicants in the form of unrestricted grants.
- A business disaster relief fund will stay as a part of the foundation, but this is secondary to the educational focus of the organization.
- The existing staff of the Greater Kirkland Chamber of Commerce is splitting their time between the 501c6 and the 501c3 organizations.



Greater Kirkland Chamber of Commerce

VISION

Diverse. Vibrant. Prosperous.

MISSION

To promote a strong and sustainable community through advocacy, education, and networking opportunities.

MEMBERSHIP SUMMARY

New Members

- At 508 members, we have the largest membership base on the Eastside.
- We have had a drop in membership with businesses experiencing extreme hardship during the COVID-19 pandemic, but we expect membership to recover after the crisis is over.
- New members represent a variety of industries, keeping in line with the Chamber's desire to keep a broad membership, representing a variety of categories.
- We are heavily emphasizing new members to get involved right away in order to help them quickly start to build relationships. The Ambassadors have played a big part in helping to make this happen.

COVID-19 Pivot

- Virtual events began immediately to inform and engage members.
- The staff personally assisted businesses with how to navigate PPP and EIDL loans, and connected members to banks for the applications.
- Informative e-blasts were sent to the membership and community to help educate and assist the public with all aspects of the crisis.
- Webinars and zoom meetings are ongoing and meant to be helpful. All community members are allowed to attend for free.

Growth Plan

- Stakeholder value examination.
 - Why do people/businesses join Chambers?
 - How does membership look during and after COVID? Have the needs changed?
- Communicating value
 - Better communication about what sets our Chamber apart from others, and from "networking-only groups."

- Sharing our successes - over 500 members and growing!
- Educating the community on why Chambers are important to any healthy business community.
- New development
 - Lots of businesses are still coming into Kirkland Urban, Village at Totem Lake, and other development projects on the Eastside.
 - Businesses are leaving Seattle and relocating to the Eastside, so we expect continued growth and demand for business space in the coming months and years.
 - Presence by at least one staff member will continue at all grand openings in new developments regardless of membership status.

Regional Viability

- We believe in a connected region, with businesses networking and participating in multiple communities. We welcome members from all over the region.
- We are working to support our neighbors and are strengthening partnerships with neighboring Eastside Chambers to help increase regional economic success.
- The Kirkland Chamber has signed on to the Eastside recovery partnership between several cities to help with the business recovery effort during and after COVID.

Welcoming New Businesses

- Ribbon cuttings are typically held regularly to welcome new businesses into Kirkland and into Kirkland Chamber membership. We are working through how to do these with the current restrictions. We anticipate some form of ribbon cuttings to return very soon.
- High participation at ribbon cuttings ensures a great kickoff for a new business, and helps get them immediately connected and welcomed to the community. We look forward to resuming these in this way once it is safe to do so.



NETWORKING

Virtual Networking Lunch

- First Thursday and fourth Tuesday of each month from 11:30am-12:30pm.
- Attendees are encouraged to order takeout from Chamber member restaurants.
- Contact info is collected and sent to attendees in an email after the event.
- Each person will have the opportunity to give their elevator pitch and make connections with others on the zoom.
- Emphasis on networking and connection.
- Attendees must pre-register.
- No fee to attend.

Virtual Business Luncheon/Lunch & Learn Programs

- Second Thursday of each month, typically from 12:00pm-1:15pm.
- This is our main monthly meeting with a formal program.
- A speaker is chosen each month to give a presentation on business or city issues.
- Emphasis on information as well as networking.
- Attendees must pre-register.
- Business owners, executives, and elected officials are typically in attendance.
- Luncheon sponsorship opportunities are available.
- Attendees must pre-register.
- No fee to attend.

Business After Hours

- Held on a Thursday evening during the month.
- Takes place on zoom during COVID.
- A virtual happy hour setting.
- Some of these events have featured the “Family Feud.”
- Emphasis on networking, connection, fun and socializing.
- Attendees must pre-register.
- There is no fee to attend.

What's For Breakfast?

- Takes place in the morning, typically on a Wednesday.
- Sometimes features a speaker or educational program, sometimes loose networking.
- This is a trial to see if our membership would like to have morning events moving forward, at least once per quarter.
- No fee to attend.
- Attendees must pre-register.

SPECIAL EVENTS (CHAMBER & FOUNDATION)

Annual Awards Luncheon

- We plan to hold this event virtually. More details to come.

Holiday Party

- We plan to hold this event virtually. More details to come.

Investor Sharks Northwest (formerly Kirkland Investor Sharks)

- This is the signature event for the Kirkland Chamber Foundation.
- We plan to hold this event virtually (this year only).
- In 2020 this event will feature all students - college and high school.
- Partnered with the Lake Washington School District for the “LWSD Teen Startup Challenge” competition, with the grand prize for two student groups being spots on stage at the 2020 Investor Sharks NW event.
- We anticipate two teams from Kirkland colleges and two teams from Kirkland high schools.
- This year, the investors will serve as a panel of judges, giving educational feedback to the presenters.
- We are currently seeking sponsors for this event.

Peter Kirk Golf Classic

- This will be the only major event we will be able to do in-person in 2020 during the COVID crisis.
- The event will be held at Echo Falls Golf Course on September 25th.
- We are taking every precaution to ensure health and safety for all who are participating.
- 128 golfers will stagger their start times to ensure proper social distancing.

Sustainable September & Fashion Show

- This event will be held virtually.
- The sustainable fashion show promotes both a sustainable community by buying local, as well as environmentally sustainable elements.
- Attendees can purchase a ticket to watch live, obtain a premium swag bag, and be entered into the raffle. The video will also be available at later time for free.



2019 Sustainable Fashion Show

Photo courtesy Kirkland Reporter

Annual Gala

- Our annual gala was set to take place in April, but needed to be postponed due to COVID.
- We held a virtual gala in June, but did not make our fundraising goal.
- This event is our biggest fundraiser of the year. We are still working through how to replace the lost revenue from this event.
- We plan to hold our big in-person gala again in March 2021.

Wine Walks

- The February 2020 wine walk was sold out and very well received.
- Remaining wine walks have been cancelled for 2020, as we cannot do them safely with COVID.
- We anticipate doing our wine walks in 2021.

Joint-Chamber Trade Fair

- The joint-chamber trade fair in partnership with Bellevue Chamber and OneRedmond was cancelled due to COVID, but we plan to return with this event in 2021.

Youth Development Program

- One of the key event programs for the Kirkland Chamber Foundation.
- Executive Director is active with the Lake Washington School District partnership.
- Resurrected the “Teen CEO” program as the “Teen Startup Challenge” - a district-wide competition for a spot on the stage at Investor Sharks Northwest.
- Looking at a possible mentorship program and/or job fair for 2021/2022.
- Virtual event allows for many more students to participate, so we are considering adding a recorded element to this moving forward.

Argosy After Hours Cruise

- Cancelled in 2020 due to COVID.
- This member favorite event will return in May 2021.

Chamber 101

- Helps new members get acquainted with Chamber membership and best practices for networking.
- Great “refresher course” for long-term members of the Chamber.
- Held quarterly, and always free.

Chamber 201

- Seminars put on by members focused on a specific business topic.
- We are looking to offer new courses through webinars to increase the number that we can make available to members.
- This is part of our commitment to include an educational element to our Chamber events.

- We are planning to keep most of these as webinars to expand the reach.

Ribbon Cuttings

- Welcomes new businesses to the Kirkland Chamber, in partnership with the City of Kirkland. These are a great way to network and show support to the community.
- We have a huge increase in these due to the number of new businesses.

Partnerships

- **Kirkland Downtown Association (KDA)**
 - Kirkland Wine Walks
 - Merchant/Downtown Events
- **Kirkland Performance Center (KPC)**
 - Kirkland Investor Sharks
 - Kirkland Town Hall
- **City of Kirkland**
 - City Manager
 - Economic Development Manager
 - City Staff
 - City Council
- **Media**
 - Kirkland Reporter/Sound Publishing
 - Kirkland Living Magazine
 - 425 Magazine/425 Business Magazine
 - Kirkland Lifestyle Magazine
- **Other Local Nonprofits**
 - Chamber staff involved in several local nonprofit organizations.
 - We have increased the amount of promotion for local nonprofits, connecting them to businesses.

Outreach

- **Now Hiring Kirkland**
 - Comprehensive list of job openings in the area (Chamber members only).
 - Created to connect local residents with local jobs, with an emphasis on working where you live to help people feel more connected to the community, reduce traffic congestion, and improve quality of life for Kirklanders.
 - Free service provided to the community, with no additional fees charged to members for listings.
 - This is our most popular publication by far, with consistently approximately 20,000 impressions on Facebook within the first hour of posting each month.
- **Presentations to local groups**

- CEO speaks often to local nonprofits and schools, including Rotary, Kiwanis, and local school groups.
- **Events**
 - Many of our recurring and special events are open invitation to the community, regardless of membership. We do encourage guests to join our Chamber after three events, but we are always open for guests to attend everything we do.
- **Volunteerism**
 - Each Kirkland Chamber staff member actively volunteers with other organizations within the community on a regular basis. This is highly encouraged and expected.
 - The Kirkland Chamber staff are encouraged to sit on a board or participate in a leadership position in a nonprofit in the community:
 - Samantha St. John - Attain Housing (2020 Board President)
 - Beth Gale - Studio East (Co-Chair of Facilities Committee)
 - We promote volunteerism among our staff, board, and members to create a connected and supported community.
- **Higher Education Partnership**
 - The Kirkland Chamber Foundation partners with local colleges and universities to help advance its mission or support students.
 - Winter 2019 featured a partnership with a program at Bellevue College to do consulting work with the Kirkland Chamber. The goal of this work area was to create a marketing strategy to increase membership base and explore funding opportunities. This included competitive analysis, potential for partner collaboration and the conducting surveys of current and potential customers to determine the customer value proposition. The results were very thorough, and we are evaluating how to utilize the findings.
- **Internship Program**
 - We offer unpaid internships for college course credit to any person over 18, who is currently enrolled in an internship program at an accredited college or university.
 - Interns gain dual experience in the business and nonprofit sectors.
 - The internship program has been quite popular, with interns learning valuable skills.



Rae Goss, Northwest University, 2019 Summer/Fall Events Intern

COMMITTEES

Chamber committees promote and strengthen relationships between members, while giving back to the community.

Ambassadors – Chairs: Kerry Read & Troy Thiel

- The primary mission of the Kirkland Chamber of Commerce Ambassadors program is the retention of existing Kirkland Chamber Members, enlistment of new members, and to serve as goodwill representatives of the chamber at a variety of functions. This energetic group helps maintain contact with other Chamber members while promoting the Kirkland Chamber of Commerce and its purpose.
- Ambassadors attend Chamber events and serve as greeters at Chamber functions such as monthly Business After Hours, Luncheons, Ribbon Cuttings and Grand Openings, as well as other Chamber activities.
- Ambassadors are the first contact that new members have upon joining the Kirkland Chamber of Commerce.
- Meetings are held from 12:00pm-1:30pm on the last Thursday of each month. Location varies (currently virtual).
- This committee is by invitation only.

Education/Kirkland Promise – Chair: Walt Krueger

- The purpose of The Kirkland Promise Committee is to improve our educational system, with the goal of increasing the number of children from Kirkland and from Lake Washington School District to experience success.
- In order to succeed, the committee is examining the educational process for children from birth, through early childhood, elementary, middle school, high school and onto college.

Event Committees – Chair: Alicia Quaco

- Several committees are formed during the year to plan our fundraising and community events. Most events are either on hold or being held virtually right now.

Public Policy Committee – Chair: Ryan James

- This committee works as a bipartisan unit to influence the introduction, enactment, or modification of government policy on behalf of our business members and our community.

Young Professionals – In progress

- This committee is currently in the early stages of revival. We will re-launch in 2021/2022.

ADVOCACY

City/Local

- CEO, Board President, President-Elect and Past President attend regular monthly meetings with the Kirkland City Manager and Economic Development Manager.
- CEO regularly attends City Council meetings to stay informed about local issues impacting the business community.
- Position letters are sent to City Council when issues of concern need to be addressed, such as the upcoming sign code ordinance conversation. CEO will address City Council on this issue and others as they come up.
- Board of Directors will take positions on local issues when they will impact Kirkland or the region.
- City advocacy remains one of the core components of the Kirkland Chamber organization.

State/Coalition

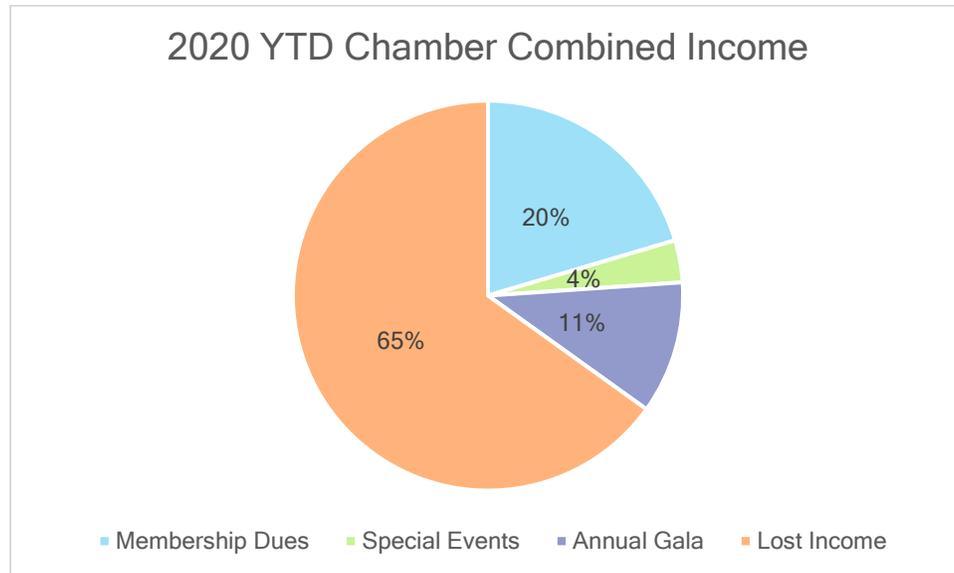
- The Kirkland Chamber is a very active member of the East King Chambers Coalition, with near perfect attendance from all delegates at monthly meetings.
- Coalition represents 11 eastside chambers, uniting our voices to lobby in Olympia on important business issues, including:
 - Education
 - Transportation
 - Economic Development (including tax reform)
 - Housing
- The Kirkland Chamber led the charge on the housing issue this year, drafting the position paper for the coalition, and began lobbying efforts pre-session.

Federal

- The Kirkland Chamber has lobbied for multiple issues to support businesses and nonprofits during the COVID crisis, including liability protections, PPP packages, and regulations.

All lobbying is done through the Greater Kirkland Chamber of Commerce, a 501c6 nonprofit organization. There is no lobbying done through the newly formed 501c3 Kirkland Chamber Foundation.

FINANCIAL SUMMARY



Since we are 501c6 and 501c3 nonprofit organizations, all of our funding comes from fundraising events, memberships, and donations. We are currently operating on 35% of our typical annual revenue, which has forced us to cut staff hours and programming. We deeply appreciate our members that have stayed with us and paid their dues, as well as our donors who have made generous donations to keep us going. It is our hope that we will be able to return to our pre-COVID operations once this crisis is over, but we need your help to sustain our future until then.

Ask us about making a tax-deductible (charitable) donation to our 501c3 foundation today, or a tax-deductible (marketing expense) sponsorship for the Kirkland Chamber today!

Balance Sheet (As of July 31, 2020)

ASSETS

Current Assets

Checking/Savings

1900 · Banner (foundation checking) 100.00
 1800 · Banner Bank 94,305.75
 1850 · Banner Bank Savings 19,040.62
 1002 · Petty Cash 50.00
 Total Checking/Savings 113,496.37

Accounts Receivable

1400 · Accounts Receivable 12,808.66
 Total Accounts Receivable 12,808.66

Other Current Assets

1488 · Golf 2,000.00
 1489 · Wine Walk 960.00
 1625 · Pre Paid Gala 14,400.00

Total Other Current Assets 17,360.00

Total Current Assets 143,665.03

Fixed Assets

1500 · Equipment 3,432.22

Total Fixed Assets 3,432.22

TOTAL ASSETS 147,097.25

LIABILITIES & EQUITY

Liabilities

Current Liabilities

Accounts Payable

2000 · Accounts Payable 1,145.30

Total Accounts Payable 1,145.30

Credit Cards

2110 · Umpqua 8462 87.47

Total Credit Cards 87.47

Other Current Liabilities

2100 · *Payroll Liabilities 623.17

2200 · PAYROLL LIABILITIES

2220 · FICA & Medicare

2225 · Company -611.52

2230 · Employee 0.48

Total 2220 · FICA & Medicare -611.04

2235 · Labor & Industries 201.67

2240 · FUTA -168.00

2245 · SUI 23.70

2200 · PAYROLL LIABILITIES - Other -623.17

Total 2200 · PAYROLL LIABILITIES -1,176.84

2300 · Deferred Revenue

2777 · Board Retreat -60.00

2780 · Wine Walk 3,000.00

2790 · Sustainable Sept 2,500.00

2700 · Undesignated Sponsorship 27,500.00

2730 · Luncheon Sponsorship 10,755.00

2758 · Investor Sharks Sponsorship 16,000.00

2766 · Golf Tournament Sponsorship 5,958.31

Total 2300 · Deferred Revenue 65,653.31

Total Other Current Liabilities 65,099.64

Total Current Liabilities 66,332.41

Total Liabilities 66,332.41

Equity

3000 · Opening Bal Equity 530.05

3900 · Retained Earnings 111,780.66

Net Income -31,545.87

Total Equity 80,764.84

TOTAL LIABILITIES & EQUITY 147,097.25

ORGANIZATION MANAGEMENT

Highlights

- Created the Kirkland Chamber Foundation.
 - This new charitable arm will allow us to do many more activities to foster our next generation of leaders and support our community.
- Formed the Kirkland Small Business Relief Fund
 - Raised over \$460,000, of which 100% was distributed in the form of unrestricted grants to Kirkland small businesses and nonprofits.
- Increased focus on educational elements.
 - Partnership with the Lake Washington School District to added a student group to the 2019 Kirkland Investor Sharks.
 - Continuing with Chamber 101 and Chamber 201 series as a form of continuing education for our members and the community.
- Increased participation in local and state advocacy.
 - Lobbied on city, state, and federal levels for COVID relief aid for businesses.
 - Kirkland Chamber recognized among the most active of chambers in the East King Chambers Coalition.
 - Led the charge on the housing reform issue among the Eastside Chambers.
 - Our Chamber has pledged to lead or be heavily involved in lobbying efforts for housing, homelessness policy reform, education, and transportation this session.
 - Worked closely with Northwest University in their successful efforts to revise their master plan.

Looking Ahead

The third and fourth quarter of 2020 outlook for the Greater Kirkland Chamber of Commerce and Kirkland Chamber foundation is all about recovery. Our membership in 2020 has stayed somewhat stable considering the effects of COVID. We anticipate that the recovery effort will be ongoing for quite some time, and it is our goal to continue to be the main organization supporting the Kirkland business community during this time. We will continue with advocacy to support this effort as well.

Our 501(c)3 foundation under the Kirkland Chamber umbrella, the Kirkland Chamber Foundation, will be a big help during this recovery time. This new charitable arm of our organization will include all of our educational elements that we are currently doing, as well as expand our offerings to encompass all things education, from early childhood to retirement.

2020 SPONSORS – THANK YOU!

Title Sponsor



Lifeline & Diamond Sponsor



Platinum Sponsors



Gold Sponsors



THE HEATHMAN HOTEL
KIRKLAND, WASHINGTON



Northwest
UNIVERSITY



CALIBER
HOME LOANS
The Messmer Team



Silver Sponsors



Bronze Sponsors

Shinstrom & Norman, AAA Aircare Systems, Scott Becker