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PRESIDENT’S NOTE

As we close the 2018 year, we want to thank the Chamber Staff for another amazing year. We appreciate their great work, commitment, and dedication, which have been integral to the Chamber’s progress and success.

We are particularly proud of our centennial – 100 years of operating in a great community that is constantly and rapidly evolving. It is a privilege to participate in the Chamber’s vision and mission in a business environment that is incredibly giving and supportive. We have strengthened our commitment to our members, sponsors, and community, and our fast-growing membership - now over 500 - is the shared result of hard work by the Staff, membership committee, and Chamber Ambassadors.

There is still plenty to be achieved in 2019 - we are looking forward to continued growth and new initiatives that will set us up for the next 100 years.

- Ryan James, 2018 Board President & Kevin Hansen, 2019 President-Elect

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, 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

EXECUTIVE DIRECTOR
Samantha St. John

DIRECTOR OF SALES & MARKETING
Beth Gale

EVENTS & MARKETING COORDINATOR
Melina Brooks

BOOKKEEPER
Diana Lynn

OFFICE COORDINATOR
Jennifer Dean

BOARD OF DIRECTORS

PRESIDENT
Ryan James, ryan james fine arts

VICE PRESIDENT/2019 PRESIDENT-ELECT
Kevin Hansen, Livengood Alskog

TREASURER
David Bander, Kirkland Performance Center

SECRETARY
Christa Chambers, Talon Private Capital

VP, EVENTS
Brenda Kauffman, Columbia Athletic Club

VP, MEMBERSHIP (CO-CHAIRS)
Scott Becker and Patty Doherty, Microsoft

VP, ECONOMIC DEVELOPMENT/TOWN HALL
Kathy Feek, Kathy Feek Art Consulting

DIRECTORS
Rich Bergdahl, RE/MAX Northwest
Judi Clark, Juanita Bay Veterinary Hospital
Laurene Burton, EvergreenHealth
Debbie Leviton, Caliber Home Loans
Alicia Quaco, Overlake Hospital
Stephanie Dickson, The Web Mentor
Jaurdey Samuel, 425 Business Magazine
Scott Heller, Wave Broadband
Anne Hess, Kirkland Living Magazine
Amy Mutal, Prevail Wealth Management
Karin Quirk, Quirk Law Group PLLC
Deby Rourke, Deby Rourke - John L. Scott
Elisabeth Sorensen, Lake WA Tech Foundation
Mark Shinstrom, Shinstrom & Norman (ex-officio)
Mary Maas, Kirkland Kiwanis (ex-officio)
Julie Metteer, KDA (ex-officio)
Kurt Triplett, City of Kirkland (ex-officio)
Jim Larson, Heathman Hotel (incoming 2019)
Howard Jacobs, Woodmark Hotel (incoming 2019)
Claudia Smith, Murphy Business Northwest (incoming 2019)
Jim Walen, Ford/Hyundai of Kirkland (incoming 2019)
MEMBERSHIP SUMMARY

New Members

- Our membership goal of 500 members by the end of the year was reached on December 5, 2018.
- 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.

Growth Plan

- Stakeholder value examination.
  - Why do people/businesses join Chambers?
- Communicating value
  - Better communication about what sets our Chamber apart from others, and from “networking-only groups.”
  - Sharing our successes - 500 members!
  - Educating the community on why Chambers are important to any healthy business community.

- New development
  - Early communication with new businesses coming into Kirkland Urban, Village at Totem Lake, and other development projects in Kirkland.
  - Presence by at least one staff member 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.
NETWORKING

With at least one networking event per week, the Greater Kirkland Chamber of Commerce leads the way for networking opportunities for its members.

Networking Lunch
- First Thursday and Fourth Tuesday of each month from 11:30am-1:00pm
- Held at a different local restaurant each time
- Business cards are 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 in the room
- Emphasis on networking and connection
- Guests may attend twice before they must join to continue attending
- A drawing is held for a free lunch at our host restaurant
- Everyone will receive their own check for lunch from the restaurant

Business Luncheon
- Second Thursday of each month from 11:30-1:15pm
- Held at The Woodmark Hotel in either the Marina Room, Lake Washington Ballroom, or the Olympic Terrace Tent
- 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
- Guests may attend at the non-member rate
- A drawing is typically held for various types of prizes
- Attendees must pre-register, and payment is made to the Kirkland Chamber
- Business owners, executives, and elected officials are typically in attendance
- Luncheon sponsorship opportunities are available
- New members are invited to address the audience

Business After Hours
- Third Thursday of each month from 5:30-7:00pm
- Held at a different local business each time
- A happy hour setting, with light bites and refreshments (usually alcoholic and non-alcoholic)
- A drawing is typically held for various types of prizes
- Emphasis on networking, connection, and socializing
- No structured program - great for mingling and approaching new people
- Guests may attend twice before they must join to continue attending
- There is no fee to attend
SPECIAL EVENTS

Annual Gala
- Most profitable gala in Kirkland Chamber history, with net proceeds of $48,000.
- Great Gatsby theme was very well received, demonstrating that festive themes that allow for costumes are popular with our crowd.
- We will expand to 300 attendees in 2019 to celebrate the Chamber’s centennial, with a theme of “Cirque du Centennial Ball.”
- 2019 proceeds goal is $100,000.

Peter Kirk Golf Classic
- 2018 tournament was held at Inglewood Golf Club. This prestigious course is a favorite among golfers.
- This year’s tournament was held on the same day as the Seahawks Monday Night Football game, slightly impacting attendance. Since the football schedule is announced well after our tournament date is secured, we cannot prevent this from happening again. However, the course was accommodating and projected the game during the awards dinner, which pleased the attendees.

Fashion Show
- The fashion show was held at the July 2018 luncheon, featuring styles from Kirkland boutiques.
- We are still evaluating whether or not this will become an annual event, or to keep it to every other year.
- This event supports our local merchants to showcase the local fashion and design industry.

Holiday Party
- The 2018 holiday party was a huge success with over 250 attendees at ryan james fine arts gallery. This was the largest holiday party on record.

Bill Woods Receives 2018 Lifetime Achievement Award
The holiday party is a free event that serves as an appreciation to our membership for their contributions for the year. Our sponsors allow us to purchase food and drinks to create a festive event at no charge to the attendees.

**Youth Development Program**

- Expanded invitations to more students for the March and November Chamber Luncheon programs, with added capacity due to increased sponsorship.
- Participated in Career Day at Finn Hill Middle School.
- Looking to expand opportunities to reach more students with our programming, including sponsoring 150 tickets to our Kirkland Investor Sharks event for local students to attend for free, and partnering further with Lake Washington School district on various initiatives.

**Argosy After Hours Cruise**

- Argosy jumped on board to sponsor this popular event in 2018.
- Larger ship allowed us to accommodate 200 guests.
- 2018 after hour cruise was a huge success, and we are bringing it back with a similar capacity for 2019.

**Sustainable September**

- We expanded the Sustainable September program this year, and included a broader definition of all things “sustainable,” including energy, environment, housing, aging, clothing, etc.
- Workshops were planned around the city, with a calendar of events that was sent to members and the public for participation.
- This new experiment taught us a lot about how to structure this type of month-long event, with clearer direction on how to structure the workshops. We have changes in place to help ensure even greater success for sustainability programs in 2019.

**Annual Awards Luncheon**

- The 2018 awards program went very well, with over 150 in attendance.
- New “President’s Award,” “Outstanding Ambassador Award,” and “Lifetime Achievement Award” were rolled out this year, and did not cause a time delay in the program.
- The program was very well received.

**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.
- Some of the 201 courses in 2019 could be offered through webinars to increase the number that we can make available to members.
- This is part of our commitment to including an educational element to our Chamber events.

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.

Kirkland Investor Sharks

- This has become the signature event for the Kirkland Chamber.
- 2018 panel featured the biggest names in the northwest investment community.
- Feedback from sponsors and attendees was excellent, and the event shows great momentum for a sell-out crowd in 2019.
- Partnering with the Lake Washington School District for the “LWSD Teen Entrepreneur” competition, with the grand prize for the student group being a spot on stage at the 2019 Kirkland Investor Sharks event.
- 2019 panel will feature big names once again, and at least one investor will join the planning committee to take the event to the next level.

Multi-Chamber Trade Fair

- We are in the early planning stages of adding a multi-Chamber trade fair in late April (tentatively).
- This would be a partnership event between Kirkland, Bothell, and Woodinville Chambers, taking place at a winery in Woodinville.
- More details are coming soon regarding expected number of booths and attendees.
COMMUNITY INVOLVEMENT

Partnerships

- **Kirkland Downtown Association (KDA)**
  - Eastside Community Cruise
  - 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
  - Kirkland Living Magazine
  - 425 Magazine/425 Business Magazine
  - Kirkland Lifestyle Magazine

Event Partnership Recap

- **Eastside Community Cruise**
  - The Eastside Community Cruise is a social community experience - a way to connect with others on the Eastside to create relationships in a recreational setting.
  - The focus is on fun, relationship building, and recreation.
  - Widespread advertising is conducted to recruit people to attend, and to showcase the social emphasis in our Chamber.
  - 2017 was a big success with a Pacific Coastal cruise on Royal Caribbean, 2018 was well received with a slightly smaller group touring Alaska on Holland America.
  - 50/50 proceeds split with Kirkland Downtown Association.
  - 2019 cruise has been cancelled, but we are considering adding one later in the year.
- **Kirkland Wine Walks**
  - Reducing the number of wine walks to four per year in response to demand. All have been sell-outs, even over sold, with the exception of the April wine walk.
  - Increased number of participating merchants to (between) 16+ in 2019 due to demand.
  - Events to be held on the shoulder seasons - February, June, October, November.
  - Wine Walks remain popular and continue to sell out each time, with November selling over 600 tickets.
  - 50/50 proceeds split with Kirkland Downtown Association.
  - 2018 glass sponsorships sold out.
  - 2019 glass sponsorships are nearly sold out, and we are adding bag sponsors.
• **Merchant/Downtown Events**
  - Working with Kirkland Downtown Association to revitalize shopping in downtown.
  - Currently seeking ideas for “shop local” campaigns.
  - We promote any efforts for exposure to local shopping, including sidewalk sales, holiday promotions, trick-or-treating, etc.
  - Anne Hess has agreed to be the “Merchant Relations” VP on the board, helping to establish better continued communication with our shop owners.

• **Kirkland Investor Sharks**
  - Modeled after TV’s popular “Shark Tank” program.
  - Highlights entrepreneurs in the region, showcasing the incredible innovation taking place in the Puget Sound area.
  - This event has quickly become our signature business event, demonstrating how a startup becomes funded by investors.
  - A scholarship program allows for 150 students from local high schools and colleges to attend for free.
  - 50/50 proceeds split with Kirkland Performance Center.

• **Kirkland Town Hall**
  - A community gathering focused on a specific topic of interest.
  - Lobby reception features local organizations related to the topic of the evening.
  - Everyone from the community is invited to attend at no charge, with donations encouraged to help fund the continuation of the event.
  - Partnership between Kirkland Performance Center and the Kirkland Chamber of Commerce is to put this on for the good of the community. We are hoping to add the city in as a partner in 2019.
  - Funds raised are reinvested into the next Town Hall event.

**City of Kirkland Relationship**

• **Community Partners**
  - The Kirkland Chamber is proud of our excellent relationship with the city of Kirkland.
  - The Kirkland City Manager, Kirkland Economic Development Manager, Kirkland Chamber Executive Director, Board President, Past President, Public Policy Chair, and Incoming President meet monthly to discuss important issues relating to the business community.
  - The Kirkland Chamber Executive Director regularly meets with members of City staff to discuss important issues relating to our members, including upcoming items such as changes coming to the City Sign Code, neighborhood master/zoning plans, and taxation issues.
  - The Kirkland Chamber Executive Director regularly attends City Council meetings, speaking publicly about issues affecting the business community where appropriate.
Media Partnerships

- **Print/Digital Media**
  - We are proud of our partnerships with leading local media for advertising and editorial content with a reach that encompasses the entire Puget Sound region.

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 over 20,000 impressions on Facebook within the first hour of posting each month.

- **Presentations to local groups**
  - Executive Director 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 to 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 member sits on a board or is in a leadership position in a nonprofit in the community:
    - Samantha St. John - Attain Housing
    - Beth Gale - Studio East
  - We promote volunteerism among our staff, board, and members to create a connected and supported community.

- **Higher Education Partnership**
  - The Kirkland Chamber partners with local colleges and universities to help advance their mission or support students.
  - Winter 2019 features a partnership with a program at Bellevue College to do consulting work with the Kirkland Chamber. The goal of this work area is to create a marketing strategy to increase membership base and explore funding opportunities. This could
also include competitive analysis, potential for partner collaboration and conducting surveys of current and potential customers to determine the customer value proposition. It will also include a survey of grant opportunities for the mission of The Greater Kirkland Chamber of Commerce.

- **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.

Here is what our 2017 Summer Intern, Jordana Price, had to say about her experience:

Dear Samantha and Beth,

First, I just wanted to thank you both. I started volunteering at the YWCA for Monterey County a little over a month ago. It has been an uplifting experience as I get to talk with clients and report on some of their events. Prior to even getting accepted as a volunteer, I was motivated to help out around me in some way. And I think from working with the Chamber I knew I wanted to go out and learn about my community here. I have you two to thank you for that, and giving me the opportunity where I could embrace my skills and be more involved. Being around you this summer and just feeling empowered by you both every week was huge for me, and it is really paying off.

I mentioned to the YWCA what I had done for the Chamber this past summer, and they loved it. So, now I am doing all of their social media and writing their monthly newsletter. Working in this kind of environment where everyone is kind and encouraging reminds me a lot of the chamber. And I am so lucky to have learned from you guys. So thank you so much for letting me blog and help out any way I could. I just wanted you to know that it is helping me with my school and future career.

Sincerely,

Jordana Price
COMMITTEES

Ambassadors – Chair: Abdoulaye Touray
- 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, alternating between the Chamber conference room and a local restaurant.

Town Hall – Chair: Kathy Feek
- Plans Kirkland Town Hall events to bring important issues to the community that impact businesses and residents.

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 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: Debbie Leviton
- Several committees are formed during the year to plan our fundraising and community events.

Public Policy Committee – Chair: Scott Becker
- 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 soon.
ADVOCACY

City/Local

- Executive Director, Board President, President-Elect and Past President attend regular monthly meetings with the Kirkland City Manager and Economic Development Manager.
- Executive Director 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. Executive Director 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 Eastside Legislative Coalition of Chambers, 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 signed on to a coalition to support our member, Fishermen’s Finest, in their effort to receive a waiver for their vessel that was built using materials that unknowingly violated the Jones Act. Fishermen’s Finest successfully received this waiver from President Trump due to the lobbying efforts, and the ship has now been cleared by the Coast Guard to fish in U.S. waters. See the article here.
- The Kirkland Chamber is working with the U.S. Small Business Administration to stay informed on the issue of group health insurance for associations that is no longer available. The Chamber is advocating for a reinstatement of this ability, and we are awaiting a decision from HHS. We will be submitting public comment on this issue.
FINANCIAL SUMMARY

2018 Chamber Income

- Membership Dues
- Networking Events
- Annual Gala

2018 Chamber Expenses

- Membership Expenses
- Events Expenses
- Operations Expenses (rent, utilities, payroll, office expenses, permits)
# Balance Sheet (As of November 30, 2018)

## ASSETS
- **Current Assets**
  - Checking/Savings
    - Banner Bank 78,614.11
    - Banner Bank Savings 19,012.02
    - Petty Cash 50.00
  - Total Checking/Savings 97,676.13
- **Accounts Receivable**
  - Accounts Receivable 49,669.33
  - Total Accounts Receivable 49,669.33
- **Other Current Assets**
  - Pre Paid Gala Deposit 2,500.00
  - Undeposited Funds 355.00
  - Total Other Current Assets 2,855.00

**Total Current Assets 150,200.46**

## TOTAL ASSETS 150,200.46

## LIABILITIES & EQUITY
- **Liabilities**
  - Current Liabilities
    - Accounts Payable
      - Accounts Payable -1,294.50
  - Credit Cards
    - Umpqua 8462 1,327.03
  - Other Current Liabilities
    - Payroll Liabilities 623.17
    - FICA & Medicare -611.04
    - Labor & Industries 136.53
    - FUTA 22.99
    - SUI 43.72
    - PAYROLL LIABILITIES - Other -623.17

**Total 2200 · PAYROLL LIABILITIES -1,029.97**

- Deferred Revenue
  - Undesignated Sponsorship 1,500.00
  - Luncheon Sponsorship 2,000.00
  - Awards Banquet Sponsorship 1,000.00
  - Gala Auction Sponsorship 2,500.00

**Total 2200 · Deferred Revenue 7,000.00**

**Total Other Current Liabilities 6,593.20**

**Total Current Liabilities 6,625.73**

**Total Liabilities 6,625.73**

## Equity
- Opening Bal Equity 530.05
- Retained Earnings 93,896.25
- Net Income 49,148.43

**Total Equity 143,574.73**

**TOTAL LIABILITIES & EQUITY 150,200.46**
ORGANIZATION MANAGEMENT

Strategic Highlights

- Increased educational elements.
  - Added Chamber 201, a continuing education series of workshops to help members better understand specific business topics.
  - Outreach to local students (middle school, high school, college) with added participation in Career Day, expansion of Youth Development Program, and a commitment to continuing to offer 150 free student tickets available at Kirkland Investor Sharks.
  - Partnership with the Lake Washington School District to add a student group to the 2019 Kirkland Investor Sharks.
- Planning for increased support in operations, events, and membership.
  - Raised additional funds at 2018 annual gala to support a new part-time staff position, and looking to break fundraising records at the 2019 gala.
  - New Events and Operations Coordinator was hired in October, which should free up existing staff time to focus on membership growth and maintenance.
- Increased participation in local and state advocacy.
  - Kirkland Chamber recognized among the most active of chambers in the Eastside Coalition of Chambers Legislative Coalition.

Financial Highlights

- 2018 fundraisers and events were all profitable to budget.
- Financial contributions from sponsors are growing, with many new sponsors added.
- Grant opportunities available to 501(c)6 nonprofit organizations are being explored to help with increased operating and marketing costs.

Looking Ahead

The January-July 2019 outlook for the Greater Kirkland Chamber of Commerce is strong. We added a part-time staff position to help with operations and events, there will be many new businesses making their announcements about coming to new developments in the first half of the year, and we will have more time to spend on new membership growth and maintenance/retention. Members can expect only good things to come from more staff time being devoted to member satisfaction.
2018 SPONSORS – THANK YOU!

Title Sponsor

EvergreenHealth

Diamond Sponsors

Aegis Living of Kirkland
Aegis Lodge of Kirkland
Google

Platinum Sponsors

Waste Management
Overlake Medical Center
GoDaddy™
Nunes Group Real Estate
Wallick & Volk
Kirkland Reporter

Gold Sponsors

Kirkland Urban
Argosy Cruises
Edward Jones
Hallmark Realty Corporation
Higher Leaf
PSE

Silver Sponsors

Woodmark Communications
Frontier Business Magazine
Conover Life
Voda
Merrill Gardens

Bronze Sponsors

Shinstrom & Norman, AAA Aircare Systems, Scott Becker