



# Kiwanis®

Date: August 1, 2021

To: Governor Lonnie Johnson, PNW Kiwanis  
Cc: District Secretary/Administrator Delanie Delimont, PNW Kiwanis

From: Brian Egger, Chair, PNW Kiwanis Strategic Planning Committee  
Members: Tyler Bosser, Melanie Bozak, Delanie Delimont, Lonnie Johnson, Janelle Lawrence, Kathleen Moylan, Ken Smith, Teresa Venne, and Greg Wegrich

Re: Final Report of the PNW Kiwanis Strategic Planning Committee

We are pleased to provide the final report of the PNW Kiwanis Strategic Planning Committee, which includes four goals and related strategies for implementation. As you know, this committee began its work in November 2020 and all of those involved have been appreciative of the opportunity to assist in improving PNW Kiwanis for the benefit of its members and the communities they serve.

A strategic plan is essential for success because it can help ensure PNW Kiwanis reaches its goals. From the very beginning, we wanted to create a strategic plan that the district could use to address specific needs of our clubs and members. To develop this strategic plan, we first had to consider three questions: (1) Where are we now? (2) Where are we going? and (3) How will we get there. Like the Kiwanis International Strategic Plan, we considered four important concepts that are woven through the plan: Kiwanis network of service, Kiwanis community, Signature project, and Service Leadership Programs as partners.

### **Kiwanis network of service**

The first is the formation of a Kiwanis network of service. To improve the lives of children and communities, we will need others to help us. This means that in addition to effectively using the existing hands and resources within our clubs we also must look outside of our clubs for extra support. The Kiwanis network of service is only as strong as its weakest link, and we must be willing to break our old patterns and habits while also pulling together other parties who can help Kiwanis become a catalyst for positive change.

### **Kiwanis community**

The second is the concept of Kiwanis community. A Kiwanis community is a local network of Kiwanis family clubs, supporters, donors, SLP alumni, for-profit and not-for-profit organizations, and others including governments, educational institutions and others that work together under the Kiwanis name. Our Kiwanis network helps lead to a Kiwanis community because the network is what allows positive change to occur. Every division needs a Kiwanis community that consciously works to strengthen its network and provide relevant service.

### **Signature project**

The third concept is that of a signature project in each of our clubs. According to Kiwanis International, a signature project is (1) annual or reoccurring, (2) high impact (the project should have a demonstrable positive impact on the community measurable in monies raised, children

served, flags hung, pounds of food donated, etc.), (3) brand-enhancing (the project should be designed to elevate the brand identity of Kiwanis in the local community with opportunities for public relations activities such as Kiwanis naming rights, media inclusions, etc.), and (4) is membership focused (should support opportunities to strengthen membership and develop new partnerships). Each club needs a signature project to provide relevant service and reinforce the value of the Kiwanis network.

### **Service Leadership Programs as partners**

And the last concept involves our Service Leadership Program participants. We need to recognize that our best asset is our Service Leadership Programs and to truly recognize Kiwanis-family leaders and members as our “partners” in service. The SLP clubs and members, including K-Kids, Builders, Key Club, Circle K, and Aktion Clubs in addition to Bring Up Grades and Terrific Kids, need to be recognized and consulted like all other full-fledged partners in service because they are part of the global and community Kiwanis networks.

Consistent with the Kiwanis International strategic plan, we have centered our efforts in four priority areas: (1) Membership and engagement, (2) Community impact, (3) Our Kiwanis image, and (4) Financial viability. We concluded that all four of these areas are also important in PNW and needed at every level. Each priority area is designed to support the other three. In addition to developing strategies within each of these areas, we considered related strengths, weaknesses, opportunities, and threats.

### **Membership and Engagement**

#### *Goal*

Our goal is to build, retain, and support a growing Kiwanis membership network. This means opening more clubs, growing existing membership, strengthening the club experience, etc.

#### *Strategies*

We developed six strategies to build, retain, and support our growing Kiwanis membership network.

- Increase membership
- Open new clubs
- Develop leaders
- Invite and build with a service focus
- Increase the value of the member experience
- Build a strong network of local and global partners

We identified specific steps PNW Kiwanis can take to successfully achieve each strategy and ultimately our desire to build, retain, and support our growing Kiwanis membership network.

### **Increase membership**

#### *SWOT*

#### *Strengths*

- Waived dues for former SLP members during their first two years in Kiwanis
- Internet clubs (allow for members to not physically be in the same location)
- Ability to market service to communities and SLPs

- 321 Model (Attractive to young professionals)
- Corporate memberships that fund young professionals' members dues
- Passionate volunteers
- Rich history
- Global reach – International organization

*Weaknesses*

- Declining membership
- Brand recognition
- Dues discounts do not generally result in retaining members
- No clear value proposition in certain clubs
- No set program for recruiting and retaining members under 40
- Resistance to change
- Limited marketing of club events and projects
- No established toolkit to promote service efforts which can help with membership recruitment efforts

*Opportunities*

- Develop district level partnerships that can help increase members
- Collaborate with other community-based organizations on administering projects
- Market projects to the community through increased education and outreach
- Utilize social media to promote club service projects and special events at the district level
- Offering paid internships to assist with district marketing efforts
- Identify opportunities for non-dues revenue

*Threats*

- Declining resources for membership recruitment activities
- Member apathy to fulfill officer responsibilities
- Failing to effectively target resources to clubs that need assistance
- Unwillingness to utilize technology for virtual interactions
- Increased competition from other service organizations for members including those that offer more regular professional development opportunities
- Lack of continuity between Kiwanis-family organizations
- Declining clubs in urban areas

<b>What specifically will we do?</b>	<b>How will we measure it?</b>	<b>Timeframe:</b>	<b>Person responsible?</b>	<b>Related costs?</b>
Develop a quarterly “community of practice” for club membership chairs that discusses best practices related to recruitment and retention as well as a discussion on related challenges	The number of community practices held and participant satisfaction with each event	Short-term: Convene the first quarterly community of practice by December 1, 2021	Membership committee/District Governor	Minimal as the District already has access to a Zoom Pro account that can host the community of practice with the permission of the Membership Chair

Work with clubs to identify membership chairs if they do not already have one and ensure they participate in board meetings	The number of clubs who have identified a membership chair that did not have one during the 2020-2021 year	Short-term: We will establish an annual goal for identifying new membership chairs by October 1, 2021	Membership Committee/District Governor	None
Recruit 120 club coaches from a variety of geographic areas to assist clubs with membership recruitment and retention	The number of club coaches recruited	Short-term: We will identify at least 30 club coaches by December 1, 2021	Membership Committee/District Governor	Minimal costs for related to training and travel
Annually evaluate staffing needs to better support social media and district infrastructure that support membership recruitment and retention efforts	Results of two-week time and task analysis of current staffing model	Long-term: Conduct this analysis no later than June 1st each administrative year to help inform the district budget development process	District Secretary	None
Assess the effectiveness of 2020-2021 Club Membership Chairs	Results of assessment to determine if membership chairs are effectively fulfilling their duties and providing direction when needed	Short-term: Conduct assessment no later than December 1, 2021	Membership Committee/District Governor	None
Connect each club under 15 members with a club coach to assess their status, needs, and possible resources to assist them with retention	Elevate the responsibility of LTGs to contact struggling clubs and engage membership committee if contact is not being made	Long-term: Ongoing	LTGs/Membership Committee	None

## Open new clubs

### SWOT

#### Strengths

- One of the strongest district membership teams in KI
- Training is available through KI for membership chairs on opening new clubs
- Use of existing prospect lists and scripts to assist with opening new clubs

#### Weaknesses

- Lack of fully trained coaches to open new clubs
- Training materials were not provided to coaches who assist with new club openings
- Some existing clubs perceive new clubs as a threat to their viability
- Some existing clubs do not use prospect lists when sponsoring new clubs

#### Opportunities

- Expand size and reach of membership team to assist with new club openings
- Make existing clubs aware of new club openings
- Clarify expectations of what the membership team can do to assist with club openings
- Promote sponsorship of Service Leadership Programs as a benefit of opening new clubs
- Examine opportunities for new clubs in communities where Kiwanis no longer exists or is declining
- Open new clubs that target young professionals employed in certain sectors such as healthcare

#### Threats

- Existing clubs will not assist with club opening efforts or serve as sponsors
- Members do not assist with membership recruitment efforts when opening new clubs
- Failure to open new clubs will result in fewer sponsors for Service Leadership Programs

What specifically will we do?	How will we measure it?	By what date	Person responsible?	Related costs?
Identify communities that currently lack sufficient sponsoring Kiwanis Clubs to support Service Leadership Programs	The number of new clubs opened with the primary purpose of supporting an existing or newly chartered Service Leadership Program	Short-term: Identify at least three such communities by December 1, 2021	Membership Committee	Costs related to travel for site surveys
Identify existing Kiwanis Clubs to sponsor new Kiwanis Clubs	The number of existing Kiwanis Clubs identified to serve as sponsoring Kiwanis Clubs	Short-term: Identify at least 12 such clubs by December 1, 2021	Membership Committee	None

## Develop leaders

### SWOT

#### Strengths

- Improved curricula by KI and availability of club leadership education (CLE) at the district level
- Availability of Amplify training to help enhance each member's general leadership skills

#### Weaknesses

- Low participation in CLE overall across the district
- Revised formats for CLE have not improved overall participation
- Information included in CLEs does not help address club needs
- Format is not engaging for participants
- No strategy for succession planning
- Fewer members willing to serve in district leadership positions

#### Opportunities

- Promote enrollment in Amplify to all members
- Personal invitations to attend CLEs and acknowledge their potential as districts leaders
- More emphasis on SLPs at CLEs and inviting SLP leaders to participate as presenters
- CLEs should be more engaging e.g., less lectures and more interactive activities
- Spotlight clubs that are successful at CLEs and consider the use of panel discussions
- Share survey results from CLEs more broadly and incorporate feedback as appropriate
- Be more thoughtful about who is delivering the training and their effectiveness as presenters

#### Threats

- Failure to revise the format of CLEs will result in fewer leaders attending
- Low participation in CLEs will result in less educated leaders
- Not addressing negative feedback from CLE surveys will result in more member apathy
- The failure to regularly assess the impact of district chair positions will result in fewer positions adding value to the organization
- Leaders' reluctance to consider diversity, equity, and inclusive principles will result in fewer inclusive clubs overall

What specifically will we do?	How will we measure it?	By what date	Person responsible?	Related costs?
Create a survey instrument evaluating CLE or similar programming used to train club leaders	The date by which the survey is created and used for assessment purposes	Short-term: The survey is created by December 1, 2021	District Secretary in consultation with the District Governor	None
Work with the Kiwanis-family Relations Committee in CKI	The number of SLP members who apply and the	Mid-term: March 1, 2022	District Governor in consultation with the District Secretary	TBD We don't have it in the budget to fund this position,

to help manage District's social media channels and other marketing efforts	output of their internship			which will make it difficult to move forward on other social media efforts.
Incentivize club officers to participate in CLE to assist with the development of leaders throughout the district	The percentage of officers who attend their Zone's CLE	Short-term: December 1, 2021	District Governor/Education Chair	TBD
Integrate succession planning into district events including annual LTG training and executive officer retreats	Number of events that include education on succession planning and its importance to the organization	Short-term: Identify curricula and events for education on succession planning by December 1, 2021	District Governor/Governor-elect	None
Appoint a special committee to evaluate the impact of current district chair positions and make related recommendations for improvement	The length of time it takes for the committee to complete its work and make related recommendations	Short term: Appoint special committee by October 1, 2021	District Governor/Governor-elect	TBD

**Focus on service to invite new members, strengthen clubs and open clubs**

*SWOT*

*Strengths*

- The Builder to highlight service
- PNW Kiwanis Facebook group
- Other social media channels including YouTube

*Weaknesses*

- Some clubs still not familiar with signature projects and SLPs
- Some clubs investing time in projects that are no longer supported by the majority of its members

*Opportunities*

- Better promote unique club service projects at the district level including those administered by SLPs
- Promote the link between Key Club/CKI and Kiwanis at all levels
- Consider how the service record of leaders may affect their credibility and impact as a district leader
- Elevate the role of the district office in helping clubs improve the impact of their service

*Threats*

- Not differentiating service projects when promoting Kiwanis i.e. park clean up vs SLP mentoring
- Not finding people to sustain our most valuable service projects including SLPs
- Not promoting the impact of service projects will result in the club not being seen as relevant to the community

<b>What specifically will we do?</b>	<b>How will we measure it?</b>	<b>By what date</b>	<b>Person responsible?</b>	<b>Related costs?</b>
Elevate the role of PR/marketing at the divisional level by identifying a POC for each division that is trained by the district	The number of PR/marketing POCs recruited	Mid-term: Recruit POC for at least 50 percent of the divisions by December 1, 2021. The remaining POCs will be recruited by October 1, 2022.	Kiwanis LTGs in consultation with the District Governor	None
Establish a district communication plan that incorporates the Builder, website, social media, and emails from the Governor. The communication plan should discuss the target audience, frequency, content, cost, and responsible parties for each communication medium.	The extent to which the communication plan is implemented once established.	Short term: Establish the communication plan and related goals by October 1, 2021, and include a status update in each report of the District Secretary thereafter.	Kiwanis District Secretary	None
Identify clubs that lack a signature	The number of clubs who	Mid-term: Create such a list of	District Governor/Lt.	None



service project or something their club is known for to external stakeholders	begin administering a service project that help develop their brand	clubs by March 1, 2021	Governors/ District Secretary	
Identify a service focus area for each quarter and identity clubs that are working in this area and related resources	The number of clubs that participate in the effort	Short-term Identify the quarterly focus areas and related resources for first quarter by October 1, 2021	District Governor/District Secretary	None

### Build a strong network of local and global partners

#### SWOT

##### Strengths

- KCCP (Doernbecher, BC Children's, Seattle Children's)
- SIGN
- Club efforts: Biz for Kidz (\$30-40K in revenue)
- Sees' Candies
- DCON sponsorship revenue (Not in 2020)
- Some clubs have partners for fundraising opportunities

##### Weaknesses

- Experience with revenue generating partners
- No template to help clubs leverage revenue from partners
- District foundation does not currently help facilitate partnerships and administer related funds

##### Opportunities

- Non-dues revenue from partners
- Work with foundation to process charitable contributions on behalf of the district for partnerships
- Leverage KI partners to help facilitate local partnerships
- Logos/company contact information included in promotional materials for district events

##### Threats

- Poor visibility in community
- Selling member contact information to partners could create dissatisfaction among members

What specifically will we do?	How will we measure it?	By what date	Person responsible?	Related costs?
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Establish an annual Kiwanis DCON sponsorship package that will help create non-dues revenue	The amount of revenue generated annually through the sponsorship package	Mid-term: The DCON sponsorship packaged should be available annually beginning on March 1, 2022	District Secretary in consultation with the District Convention Committee	TBD
Establish a series of webinars that promote local and global partners and how clubs can engage with them	Number of Webinars completed during the 2021-2022 year	Short-term: The first Webinar will be held no later than November 1, 2021	Partnership Chair/District Governor	None
Develop a list of local organizations that the district could formally partner with	Number of possible organizations the district could formally partner with	Short-term: The first draft of such a list will be developed by November 1, 2021	Partnership Chair/Executive Committee	None
Expand the Exhibit Hall at DCON to include non-fundraising partners	Number of partners invited to participate in the Exhibit Hall	Mid-term: The first draft of such invitations will be developed by March 1, 2021	DCON Chair/District Governor/District Secretary	Hotel costs related to Exhibit Hall (space rental, equipment, WIFI, etc.)

## **Community Impact**

### *Goal*

Our goal is to perform meaningful service, with service to children as our priority. Kiwanis is best expressed through meaningful service in communities around the world. As a result, we will work together and with organizations to address important needs for children in our district.

### *Strategies*

We developed two strategies to perform meaningful service, with service to children as our priority.

- Empower and support growth in our Service Leadership Programs
- Align relevant service with community needs

We identified specific steps PNW Kiwanis can take to successfully achieve each strategy and ultimately our desire to perform meaningful service, with service to children as a priority.

## **Empower and support growth in our Service Leadership Programs (SLP)**

### *SWOT*

#### *Strengths*

- Succession planning for Key Club leaders and advisors
- Well recognized in the “general marketplace”
- Global Leadership Certificate Program provides a tangible benefit for members and club building opportunities
- Able to help promote the impact of Kiwanis

#### *Weaknesses*

- Information about the status of Builders Club/K-Kids
- Engagement with CKI leadership
- Un-sponsored Key Clubs
- Experience of Builders Club/CKI DAs
- Plan for coming out of the pandemic and sustaining SLPs
- Succession planning for CKI leaders
- Advisor training/awareness of SLP sponsorship obligations

#### *Opportunities*

- Leveraging SLP networks for Kiwanis membership and partnerships
- Identify ways for other service organizations to support SLPs without losing Kiwanis ownership of programs
- Creating dedicated scholarship funds for K-12 students who have financial need including those that are eligible for free and reduced lunch through the National School Lunch Program

#### *Threats*

- Poaching of SLPs by other service organizations
- Ongoing liability and legal concerns
- WA HB 1660 - membership dues and new fundraising requirements for school-based organizations

### **Operational steps to empower and support growth in our Service Leadership Programs**

<b>What specifically will we do?</b>	<b>How will we measure it?</b>	<b>By what date</b>	<b>Person responsible?</b>	<b>Related costs?</b>
Increase the number of Aktion Clubs	Number of Aktion Clubs chartered	Long-term: September 30, 2022	Aktion Club Administrator/ Kiwanis LTGs	Chartering and sponsorship fees
Ensure all active Key Clubs have a sponsoring Kiwanis Club	Number of unsponsored/orphaned Key Clubs that secure a sponsoring Kiwanis Club	Mid-term: September 30, 2021	Key Club Administrator/ Kiwanis LTGs	Sponsorship fees

Increase the number of Builders Club	Number of Builders Club chartered	Long-term: September 30, 2022	Builders Club Administrator/ Kiwanis LTGs	Sponsorship fees
Assess the status of CKI operations to identify areas for potential improvements	Creation of a district strategic plan that includes metrics for assessing implementation	Mid-term: March 31, 2022	CKI Administrator/ Kiwanis Governor	TBD
Assess the status of K-Kids operations to identify areas for potential improvements	Conduct a SWOT analysis of the K-Kids program to help identify areas for potential improvements	Short-term: December 1, 2021	K-Kids Administrator/ Kiwanis Governor	TBD
Creation and maintenance of a Kiwanis-family directory of clubs	Utilization of directory by members	Short-term: December 1, 2021	District Secretary/SL P Administrators	None
Promote Webinars which describe the benefits of staying in the Kiwanis-family	Identify webinars that serve this purpose and establish a mechanism for tracking participation	Short-term: December 1, 2021	District Secretary/SL P Administrators	None

### **Align relevant service with community needs**

#### SWOT

##### *Strengths*

- Number of signature projects
- Ability to review projects and fundraisers using a district tool that helps assess their utility
- ACE Tool - Relevance of projects in your community
- LTGs have access to club secretary reports to identify service being performed

##### *Weaknesses*

- Unwilling to experiment at all levels because of past failures
- Club resistance to change
- Not analyzing project information included in Secretary reports
- Not training LTGs on how to advise clubs on projects and related improvements

##### *Opportunities*

- Spotlight successful Signature Projects to help other clubs improve their projects e.g., Tallship Training for 4th Graders
- WA Volunteer Month: Nominate signature projects for recognition at the state level
- Dedicated pace in *The Builder* to feature ongoing service projects being administered by clubs
- Using DCMs to discuss projects and fundraisers and help facilitate the sharing of best practices
- Enhancing or modifying LTG training to elevate the importance of providing valuable service and reviewing club information

**Threats**

- Relevancy of organization is connected to the relevancy of our service
- Not offering relevant service decreases the likelihood of membership growth
- Not addressing the needs of clubs in this area contributes to further disengagement
- Not using statistics to drive service investments may not help us focus on the right things

<b>What specifically will we do?</b>	<b>How will we measure it?</b>	<b>By what date</b>	<b>Person responsible?</b>	<b>Related costs?</b>
Incentivize use of a tool to assess the effectiveness of projects and fundraisers (Vicki's tool)	Utilization of assessment tool by clubs	Short-term: December 1, 2021	Education Chair/Kiwanis Governor	Limited- Possible Incentives
Promote the use of a community assessment tool with some regularity (ACE)	Utilization of assessment tool by clubs	Short-term: December 1, 2021	Education Chair/Kiwanis Governor	Limited - Possible Incentives
Promote at least quarterly signature projects being administered in the district ( <i>The Builder</i> , website, social media channels, etc.)	Number of projects promoted	Short-term: December 1, 2021	Signature Project Chair/District Secretary	None

**Our Kiwanis Image**

*Goal*

Our goal is to enhance the Kiwanis image in our district. Our image is anything people think or feel about us when they see our logo, our wordmark, hear our name or see a Kiwanian in action.

*Strategies*

We developed one strategy to enhance the Kiwanis image in our district.

- Increase name recognition and knowledge of our mission districtwide

We identified specific steps PNW Kiwanis can take to successfully achieve this strategy and ultimately enhance the Kiwanis image in our district.

**Increase name recognition and knowledge of our mission districtwide**

*SWOT*

*Strengths*

- Clubs have made progress to better promote their efforts
- Clubs spotlight achievements at annual installation banquets
- Some clubs have members that have expertise in PR
- SLP marketing materials enhance name recognition

*Weaknesses*

- Branding strategy for districts is not well developed by Kiwanis International
- Rotary has a strong presence in B.C. areas particularly Vancouver
- Joining Kiwanis is to do work, versus joining Rotary to network
- We are the “best kept secret”
- Branding strategy is not centralized, and districts lack resources to administer such a strategy
- Clubs do not prioritize the promotion of events and projects which can help with brand recognition

*Opportunities*

- Help clubs create an annual report such as through flyers or handouts that highlight the impact of their service
- Identify people with subject matter expertise to assist with PR strategy
- Leverage foundation to develop a PR strategy for service impact especially for the grants given to clubs
- Hiring a student intern to assist district with the development of a PR strategy

*Threats*

- Unwillingness to allocate resources or attention at the club and district levels to do PR
- One person at best is trying to promote the impact of Kiwanis in most clubs
- Lack of resources to do PR with membership
- Lack of a PR strategy for the district

**Operational steps to increase name recognition worldwide**

<b>What specifically will we do?</b>	<b>How will we measure it?</b>	<b>By what date</b>	<b>Person responsible?</b>	<b>Related costs?</b>
Use results from the district communication survey to target district communications	TBD	Short term: December 1, 2021	District Secretary/District Board	Minimal
Develop a plan for securing additional resources to focus on PR (operational vs strategic)	Amount of additional resources secured	Long-term: September, 30, 2021	District Governor	TBD

Increase social media presence (Instagram, Twitter, LinkedIn)	Number and frequency of posts	Short term: December 1, 2021	TBD	Minimal; time allocated to develop posts
Promote KI resources from PR campaigns: Kids Need Kiwanis/One Can Make a Difference, What If	Number of communications that promote the use of these resources	Short term: December 1, 2021	PR Chair	Minimal
Establish a Hoot Suite account or something similar for use by district office	Plan to utilize platform	Short term: December 1, 2021	PR Chair/District Secretary/Other committee members	\$540 (at least)/year

## **Financial Viability**

### *Goal*

Our goal is to ensure financial viability and responsible stewardship. Financial viability means being good stewards of time, talent, and resources. The more financially viable we are, the more children we can help.

### *Strategies*

We developed three strategies to ensure financial viability and responsible stewardship.

- Exercise proper stewardship of resources
- Build a non-dues revenue base
- Develop financial education

We identified specific steps PNW Kiwanis can take to successfully achieve each strategy and ultimately our desire to perform meaningful service, with service to children as a priority.

## **Exercise proper stewardship of resources**

### *SWOT*

#### *Strengths*

- Paid mortgage
- Income from tenants
- Income from bricks for maintenance expenses
- Maximizing income by consolidating space used by PNW Kiwanis
- Reducing costs with selected vendors related to the district office including internet

#### *Weaknesses*

- Maintenance outlays may not be covered by rent
- Significant backlog of repairs for district office building
- Copier contract (\$1,000/month)
- Systematic review of budget is not regular

- Income is based on membership (slight decline each year)

*Opportunities*

- Rent conference room for day meetings
- Committee expenses are budgeted, but not always used.
- Find non-dues revenue sources (DCON sponsorships); Co-chair for partnerships that will focus on income generating activities
- Strategically evaluate staff functions of office
- Expand auction to offset district administrative expenses

*Threats*

- Sustaining the district's administrative operations
- Focusing on building clubs exclusively doesn't necessarily always lead to long-term revenue through membership dues

<b>What specifically will we do?</b>	<b>How will we measure it?</b>	<b>By what date</b>	<b>Person responsible?</b>	<b>Related costs?</b>
Review officer budgets to determine expenses and return on investment	TBD	Short-term: September 30, 2021	District Treasurer/District Governor	None
Plan for district travel to clubs and divisions based on need	Number of target clubs and divisions identified	Short-term: September 30, 2021	District Secretary/District Governor	None
Identify non-dues revenue including use of district office by external organizations	Number of non-dues revenue opportunities identified	Long-term: September 30, 2022	District Secretary/District Governor	Minimal
Develop an investment strategy for funds held in reserve	TBD	Short-term: December 1, 2021	District Treasurer/Finance Committee Chair	None
Evaluate funds used for recognition of clubs and members	TBD	Short-term: December 1, 2021	District Secretary/District Governor	None
Systematic review of accounts and expenditures	Financial Review/Audit	Short-term: September 30, 2021	District Treasurer/Finance Committee Chair	TBD
Review policies for obligating district to multi-year expenses	Financial Review/Audit	Short-term: September 30, 2021	District Treasurer/Finance Committee Chair	None

**Build a non-dues revenue base**

*SWOT*



**Strengths**

- Auction - \$12,500 (25 percent to Outreach, 75 percent to District Administrative fund)
- Access to the *Greater Giving* platform through Oregon Impact Inc.
- Generous members who are willing to make donations to increase non-dues revenue

**Weaknesses**

- 501c4 designation makes it challenging to be eligible for grants or other funding streams
- Some grant funding to support administrative operations may not be available to the district as a 501c4
- Making sure members understand the importance of using discounts so these partnerships will continue in the future
- No marketing plan that includes benefits of sponsorship and levels of support that will provide certain benefits during district events

**Opportunities**

- Further collaboration with other organizations when hosting fundraisers
- Seek additional donations from the foundation
- Add an opportunity for people to donate when registering for events or participating in other online fundraising events
- Being more proactive about selling sponsorships for DCON so See's is not the only sponsor
- Identify other organizations that can make contributions to the organization
- Apparel sponsor for DCON
- Opportunities to explore revenue granting opportunities for the district when planning events including hotel room rebates to district
- Use of professional meeting planner

**Threats**

- Competing with other organizations for contributions
- Need to make sure the terms and conditions of the partnership are mutually beneficially so each sponsor will continue their support
- People not supporting partners out of frustration when they try to market their products or services

<b>What specifically will we do?</b>	<b>How will we measure it?</b>	<b>By what date</b>	<b>Person responsible?</b>	<b>Related costs?</b>
Create a task group to identify possible sponsors	Progress of taskforce	Short term: December 1, 2021	District Secretary/District Governor	None
Develop a marketing plan to promote sponsorships and related benefits	Development of marketing plan and mechanism to track progress	Long-term: September 30, 2022	District Secretary/District Governor	None
Create an annual fundraising plan including events i.e. DCON and expected revenue targets	Development of fundraising plan and mechanism to track progress	Long-term: September 30, 2022	District Secretary/District Governor	None

Ensure website and event registration forms provide the ability to make donations	Number of donations secured through event registration forms	Short-term: December 1, 2021	District Secretary/District Governor	TBD
Review the status of each sponsor and discuss ways to expand utilization of the offering i.e. See's	Number of sponsors identified for possible expansion	Short-term: December 1, 2021	District Secretary/District Governor	Minimal
Explore opportunities to include concessions that will result in revenue for the district for DCON and Mid-Winter	Number of concessions included in new contracts	Long-term: September 30, 2022	District Secretary/District Governor	Minimal

## Develop Financial Education

### SWOT

#### Strengths

- District Secretary is responsible for compliance on a paid basis
- District has experienced volunteers with accounting backgrounds

#### Weaknesses

- District has been out of compliance with IRS regulations in prior years
- Resources needed to cover accounting fees related to compliance

#### Opportunities

- Leverage financial education included in CLE at other events
- Club Board of Directors need to be educated on balance sheets, P&Ls, etc.
- Identify clubs that need financial education or have not been compliant with IRS regulations
- Create incentives for clubs to participate in financial education opportunities
- Identify new opportunities to explain how the district uses its financial resources to support clubs and administrative expenses

#### Threats

- Failing to comply can may result in loss of grant funding from KI and/or not being a district in good standing
- Poor reputation may affect eligibility for future grants and/or nonprofit status

### Operational steps to develop financial education

What specifically will we do?	How will we measure it?	By what date	Person responsible?	Related costs?
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Identifying events that can include financial education (Form 990, 990EZ) for clubs and officers (besides CLE or DCON) and include participation incentives to the extent possible	Number of events identified	Short-term: October 1, 2021	District Governor/Training Chair	None
Create a checklist for financial compliance that can be used to monitor district affiliated entities i.e. district foundation, club foundations, etc.	Development of checklist and mechanism to track progress	Short-term: December 1, 2021	District Treasurer/Finance Committee Chair	None
Prepare an annual report that summarizes finances, activities, and contributions.	Development of annual report	Long-term: September 30, 2022	Executive committee	None
Monitor foundation standing through online applications (90/100: Charity Navigator)	TBD	Long-term: Ongoing	District/Treasurer/Finance Committee Chair	TBD
Identify KI resources related to financial education and how those can be leveraged in districts communications	Number of resources identified	Short-term: December 1, 2021	District Secretary/Treasurer	None

In conclusion, we believe that by focusing on the four priority areas and completing each of the operational steps associated with each strategy, we can create a positive future for PNW Kiwanis. To help ensure the District Board successfully administers this strategic plan, it will be imperative for the District Secretary and District Governor to create a regular reporting mechanism that tracks progress and identifies challenges that may undermine completion of each operational step. In addition, we recommend that the 2021-2022 District Board adopt the plan in its entirety and ensure the proposed timelines are realistic and appropriate. Again, thank you for allowing the Strategic Planning Committee to help expand and enhance the impact of PNW Kiwanis through its clubs and members.

**Appendix: 55 Operational Steps (By Type)**

### Short-term Operational Steps (36)

Develop a quarterly “community of practice” for club membership chairs that discusses best practices related to recruitment and retention as well as a discussion on related challenges	The number of community practices held and participant satisfaction with each event	Short-term: Convene the first quarterly community of practice by December 1, 2021	Membership committee/District Governor	Minimal as the District already has access to a Zoom Pro account that can host the community of practice with the permission of the Membership Chair
Work with clubs to identify membership chairs if they do not already have one and ensure they participate in board meetings	The number of clubs who have identified a membership chair that did not have one during the 2020-2021 year	Short-term: We will establish an annual goal for identifying new membership chairs by October 1, 2021	Membership Committee/District Governor	None
Recruit 120 club coaches from a variety of geographic areas to assist clubs with membership recruitment and retention	The number of club coaches recruited	Short-term: We will identify at least 30 club coaches by December 1, 2021	Membership Committee/District Governor	Minimal costs for related to training and travel
Assess the effectiveness of 2020-2021 Club Membership Chairs	Results of assessment to determine if membership chairs are effectively fulfilling their duties and providing direction when needed	Short-term: Conduct assessment no later than December 1, 2021	Membership Committee/District Governor	None
Identify communities that currently lack sufficient sponsoring Kiwanis Clubs to support	The number of new clubs opened with the primary purpose of supporting an existing or newly	Short-term: Identify at least three such communities by December 1, 2021	Membership Committee	Costs related to travel for site surveys

Service Leadership Programs	chartered Service Leadership Program			
Identify existing Kiwanis Clubs to sponsor new Kiwanis Clubs	The number of existing Kiwanis Clubs identified to serve as sponsoring Kiwanis Clubs	Short-term: Identify at least 12 such clubs by December 1, 2021	Membership Committee	None
Create a survey instrument evaluating CLE or similar programming used to train club leaders	The date by which the survey is created and used for assessment purposes	Short-term: The survey is created by December 1, 2021	District Secretary in consultation with the District Governor	None
Incentivize club officers to participate in CLE to assist with the development of leaders throughout the district	The percentage of officers who attend their Zone's CLE	Short-term: December 1, 2021	District Governor/Education Chair	TBD
Integrate succession planning into district events including annual LTG training and executive officer retreats	Number of events that include education on succession planning and its importance to the organization	Short-term: Identify curricula and events for education on succession planning by December 1, 2021	District Governor/Governor-elect	None
Appoint a special committee to evaluate the impact of current district chair positions and make related recommendations for improvement	The length of time it takes for the committee to complete its work and make related recommendations	Short term: Appoint special committee by October 1, 2021	District Governor/Governor-elect	TBD
Establish a district communication plan that incorporates the Builder, website, social media, and emails from the Governor. The	The extent to which the communication plan is implemented once established.	Short term: Establish the communication plan and related goals by October 1, 2021, and	Kiwanis District Secretary	None

communication plan should discuss the target audience, frequency, content, cost, and responsible parties for each communication medium.		include a status update in each report of the District Secretary thereafter.		
Identify a service focus area for each quarter and identify clubs that are working in this area and related resources	The number of clubs that participate in the effort	Short-term Identify the quarterly focus areas and related resources for first quarter by October 1, 2021	District Governor/District Secretary	None
Establish a series of webinars that promote local and global partners and how clubs can engage with them	Number of Webinars completed during the 2021-2022 year	Short-term: The first Webinar will be held no later than November 1, 2021	Partnership Chair/District Governor	None
Develop a list of local organizations that the district could formally partner with	Number of possible organizations the district could formally partner with	Short-term: The first draft of such a list will be developed by November 1, 2021	Partnership Chair/Executive Committee	None
Assess the status of K-Kids operations to identify areas for potential improvements	Conduct a SWOT analysis of the K-Kids program to help identify areas for potential improvements	Short-term: December 1, 2021	K-Kids Administrator/Kiwanis Governor	TBD
Creation and maintenance of a Kiwanis-family directory of clubs	Utilization of directory by members	Short-term: December 1, 2021	District Secretary/SLP Administrators	None
Promote Webinars which describe the benefits of staying in the Kiwanis-family	Identify webinars that service that service this purpose and establish a mechanism for	Short-term: December 1, 2021	District Secretary/SLP Administrators	None

	tracking participation			
Incentivize use of a tool to assess the effectiveness of projects and fundraisers (Vicki's tool)	Utilization of assessment tool by clubs	Short-term: December 1, 2021	Education Chair/Kiwanis Governor	Limited-Possible Incentives
Promote the use of a community assessment tool with some regularity (ACE)	Utilization of assessment tool by clubs	Short-term: December 1, 2021	Education Chair/Kiwanis Governor	Limited - Possible Incentives
Promote at least quarterly signature projects being administered in the district ( <i>The Builder</i> , website, social media channels, etc.)	Number of projects promoted	Short-term: December 1, 2021	Signature Project Chair/District Secretary	None
Use results from district communication survey to target district communications	TBD	Short term: December 1, 2021	District Secretary/District Board	Minimal
Increase social media presence (Instagram, Twitter, LinkedIn)	Number and frequency of posts	Short term: December 1, 2021	TBD	Minimal; time allocated to develop posts
Promote KI resources from PR campaigns: Kids Need Kiwanis/One Can Make a Difference, What If	Number of communications that promote the use of these resources	Short term: December 1, 2021	PR Chair	Minimal
Establish a Hoot Suite account or something similar for use by district office	Plan to utilize platform	Short term: December 1, 2021	PR Chair/District Secretary/Other committee members	\$540 (at least)/year

Review officer and staff budgets to determine actual expenses and return on investment	TBD	Short-term: September 30, 2021	District Treasurer/District Governor	None
Plan for district travel to clubs and divisions based on need	Number of target clubs and divisions identified	Short-term: September 30, 2021	District Secretary/District Governor	None
Develop an investment strategy for funds held in reserve	TBD	Short-term: December 1, 2021	District Treasurer/Finance Committee Chair	None
Evaluate funds used for recognition of clubs and members	TBD	Short-term: December 1, 2021	District Secretary/District Governor	None
Systematic review of accounts and expenditures	Financial Review/Audit	Short-term: September 30, 2021	District Treasurer/Finance Committee Chair	TBD
Review policies for obligating district to multi-year expenses	Financial Review/Audit	Short-term: September 30, 2021	District Treasurer/Finance Committee Chair	None
Identifying events that can include financial education (Form 990, 990EZ) for clubs and officers (besides CLE or DCON) and include participation incentives to the extent possible	Number of events identified	Short-term: October 1, 2021	District Governor/Training Chair	None
Create a checklist for financial compliance that can be used to monitor district affiliated entities i.e. district foundation, club foundations, etc.	Development of checklist and mechanism to track progress	Short-term: December 1, 2021	District Treasurer/Finance Committee Chair	None



Identify KI resources related to financial education and how those can be leveraged in districts communications	Number of resources identified	Short-term: December 1, 2021	District Secretary/Treasurer	None
Create a task group to identify possible sponsors	Progress of taskforce	Short term: December 1, 2021	District Secretary/District Governor	None
Ensure website and event registration forms provide the ability to make donations	Number of donations secured through event registration forms	Short-term: December 1, 2021	District Secretary/District Governor	TBD
Review the status of each sponsor and discuss ways to expand utilization of the offering i.e. See's	Number of sponsors identified for possible expansion	Short-term: December 1, 2021	District Secretary/District Governor	Minimal

**Mid-term Operational Steps (7)**

Work with the Kiwanis-family Relations Committee in CKI to help manage District's social media channels and other marketing efforts	The number of SLP members who apply and the output of their internship	Mid-term: March 1, 2022	District Governor in consultation with the District Secretary	TBD
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Elevate the role of PR/marketing at the divisional level by identifying a POC for each division that is trained by the district	The number of PR/marketing POCs recruited	Mid-term: Recruit POC for at least 50 percent of the divisions by December 1, 2021. The remaining POCs will be recruited by October 1, 2022.	Kiwanis LTGs in consultation with the District Governor	
Identify clubs that lack a signature service project or something their club is known for to external stakeholders	The number of clubs who begin administering a service project that help develop their brand	Mid-term: Create such a list of clubs by March 1, 2021	District Governor/Lt. Governors/ District Secretary	None
Establish an annual Kiwanis DCON sponsorship package that will help create non-dues revenue	The amount of revenue generated annually through the sponsorship package	Mid-term: The DCON sponsorship packaged should be available annually beginning on March 1, 2022	District Secretary in consultation with the District Convention Committee	TBD
Expand the Exhibit Hall at DCON to include non-fundraising partners	Number of partners invited to participate in the Exhibit Hall	Mid-term: The first draft of such invitations will be developed by March 1, 2021	DCON Chair/District Governor/District Secretary	Hotel costs related to Exhibit Hall (space rental, equipment, WIFI, etc.)
Ensure all active Key Clubs have a sponsoring Kiwanis Club	Number of unsponsored/orphaned Key Clubs that secure a sponsoring Kiwanis Club	Mid-term: September 30, 2021	Key Club Administrator/Kiwanis LTGs	Sponsorship fees

Assess the status of CKI operations to identify areas for potential improvements	Creation of a district strategic plan that includes metrics for assessing implementation	Mid-term: March 31, 2022	CKI Administrator/Kiwanis Governor	TBD
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### Long-term Operational Steps (12)

Annually evaluate staffing needs to better support social media and district infrastructure that support membership recruitment and retention efforts	Results of two-week time and task analysis of current staffing model	Long-term: Conduct this analysis no later than June 1st each administrative year to help inform the district budget development process	District Secretary	None
Connect each club under 15 members with a club coach to assess their status, needs, and possible resources to assist them with retention	Elevate the responsibility of LTGs to contact struggling clubs and engage membership committee if contact is not being made	Long-term: Ongoing	LTGs/Membership Committee	None
Increase the number of Aktion Clubs	Number of Aktion Clubs chartered	Long-term: September 30, 2022	Aktion Club Administrator/Kiwanis LTGs	Chartering and sponsorship fees
Increase the number of Builders Club	Number of Builders Club chartered	Long-term: September 30, 2022	Builders Club Administrator/Kiwanis LTGs	Sponsorship fees
Develop a plan for securing additional resources to focus on PR (operational vs strategic)	Amount of additional resources secured	Long-term: September, 30, 2021	District Governor	TBD

Identify non-dues revenue including use of district office by external organizations	Number of non-dues revenue opportunities identified	Long-term: September 30, 2022	District Secretary/District Governor	Minimal
Prepare an annual report that summarizes finances, activities, and contributions.	Development of annual report	Long-term: September 30, 2022	Executive committee	None
Monitor foundation standing through online applications (90/100: Charity Navigator)	TBD	Long-term: Ongoing	District/Treasurer/Finance Committee Chair	TBD
Develop a marketing plan to promote sponsorships and related benefits	Development of marketing plan and mechanism to track progress	Long-term: September 30, 2022	District Secretary/District Governor	None
Create an annual fundraising plan including events i.e. DCON and expected revenue targets	Development of fundraising plan and mechanism to track progress	Long-term: September 30, 2022	District Secretary/District Governor	None
Explore opportunities to include concessions that will result in revenue for the district for DCON and Mid-Winter	Number of concessions included in new contracts	Long-term: September 30, 2022	District Secretary/District Governor	Minimal