GOVERNORS-ELECT EDUCATION CONFERENCE

NOVEMBER 1ST-4TH 2017
IF THE WORLD WERE 100 PEOPLE
After visualizing the world within this room, has your perspective changed?
How might these issues be of critical importance to children versus adults?
What does it mean to think globally and act locally?
GLOBAL MEMBERSHIP AND EDUCATION

Gloria Bidgood, Volunteer Support Coordinator
Stephanie Miller, Communications Specialist
Cyndi Portteus, Data Specialist
Carrington Clodius, Education Specialist
Brian Tenclinger, Area Director Manager
Brad Boyd, Area Director- Central USA
Juanita Galvis, Area Director- Eastern Canada and the Caribbean, Latin America
Lanton Lee, Area Director- Mid-Central USA
Chris Martz, Area Director- Northeast USA
Rhonda Vrell, Area Director- Southeast USA
Lynsy Wikel, Area Director- Western USA
Bryce Kinder, Member Services
• 1:1 meeting between President-elect Poly and each Governor-elect
• Each area has a specific time slot noted in their schedule
• Located in the Johnston Room and Embassy Suites
• Please bring your personal goals and questions
Welcome

Introduction and warm-up

Write the following information on your name badge:

A person who has been a major influence on you
Why you joined Kiwanis
Why you stay in Kiwanis

YOUR NAME

What you would do with $10,000 (USD)

What you expect from this week’s training

Write the following:

- Person who has been a major influence on you
- What you would do with $10,000 (USD)
- Why you joined Kiwanis
- What you expect from this week’s training
“Our mission is to preserve and protect the future of Indiana’s children”

Adoption • Community Partners • Child Care Services • Home-based Services • Father Engagement • Foster Care • Older Youth Services • Residential Care • Training

IN 2016, CB HELPED 47,138 KIDS

HOPE FOR THE HOLIDAYS SERVED 1,100 KIDS
Instructions
1. Write an encouraging, comforting, etc. note on your card
2. Pick up a tote bag and place the following inside:
   - card
   - teddy bear
   - book (note the reading age)
   - blanket
3. Place your filled bag in the correct pile based on the book’s reading age
This service project can be done in any district by any club. Just follow these steps to recreate this at home:

1. Contact local child welfare or safety office to ask about donation restrictions
2. Order blankets, totes, and stuffed animals from kiwanis.dollardays.com
3. Order books from our partner Scholastic
4. Gather a team to assemble and donate bags
“If you want to build a ship, don’t drum up people to collect wood and don’t assign them tasks and work, but rather teach them to long for the endless immensity of the sea.”

Antoine de Saint-Exupery
Through Service Leadership Programs, Kiwanis is striving to build the greatest generation of service our world has ever known.

We do this by giving our members the experience of service leadership.
Service Leadership is the powerful force that occurs once a person discovers their heart to serve, answers their call to lead and exercises the courage to engage.

It is the premier level of social contribution.
When someone discovers their heart to serve, they decide that serving others is not only something they do—but is their way of life.
Discovers their heart to serve
Someone with a call to lead decides to step forward instead of standing still.
Answers the call to lead
Exercising the courage to engage means choosing to build authentic human relationships, so that you can receive the influences of others and share your own influences with them.
Exercises the courage to engage
Help us inspire greater and more involved Kiwanis sponsorship!
Understand programs

Include SLP in speeches

Equal attention to all SLP programs

Attend KCI, CKI, Aktion Club District Conventions

Correspond with SLP District Leaders

Thank clubs for SLP support

Know obligations

Delegate to administrators

Strengthen clubs
10 Obligations of SLP Sponsorship

For more information about advising, visit:
Kiwanis.org/sponsors
Kiwanis.org/advisor
SERVICE LEADERSHIP PROGRAMS

AKTION CLUB

KEY CLUB

CKI
Circle K International

Kiwanis K-Kids
Young Leaders Helping Others
PROGRMS AND INITIATIVES

KEY LEADER®

Kiwanis Terrific Kids®

Kiwanis Bring Up Grades®

KEY CLUB BREAK THROUGH

K CORPS: YOUTH EXCHANGE
Check out the websites on page 68 for more information about our Service Leadership Programs!
I wish I knew more about SLP...

If you need more information, help is just a click away. Visit kiwanis.org/clubs
OTHER THOUGHTS

• Key Club has 272,315 members in 38 nations
• International District expansion
• International Schools Initiative
• Governor connect- KCI, CKI, Kiwanis
• Partnerships- Unicef/Eliminate, Thirst Project, March of Dimes, Kid’s Rights
ANY QUESTIONS?

PRESENTATION BY
ROY HEDEEN AND JAMESON ROOT
PARTNER RECOGNITION

Sponsors - companies that pay an annual fee to Kiwanis in exchange for marketing rights and benefits.
Promotional partners - companies that utilize a Kiwanis themed campaign to drive awareness of Kiwanis and its mission.
Preferred charities - organizations that provide Kiwanis with service projects and fundraising opportunities in support of that organization’s effort.
Community partners – Partnering organizations commit to providing various in-kind promotion and access benefits with a goal of strengthening local communities through mission alignment of both organizations.
Cause marketing partners - Partnering organizations commit to providing annual financial investment in exchange for the marketing rights and benefits to mobilize the Kiwanis family members in support of a specific cause marketing campaign.
Club Resource Partners - Organizations offer preferred pricing and exclusive benefits to Kiwanis clubs and members.
• Build a playground with Landscape Structures
• Invite local Army soldiers to speak at a club meeting
• Encourage Key Club members to participate in Nickelodeon’s Worldwide Day of Play
• Nominate outstanding Key Club members for Nickelodeon’s Halo Effect Awards
• Bring an Up With People show to your community
• Install a reading oasis room with Scholastic Books
• Order low cost service project supplies from Dollar Days
• Organize a club or district trip through Kiwanis Travel
• Support preferred charities through service projects, mentoring, and fundraising activities
Member benefits portfolio includes

• Kiwanis Travel
• Kiwanis Insurance
• Kiwanis VISA Rewards card
• Protect America
• IdentityForce
Kiwanis International membership lists are not being sold.

Kiwanis International manages the membership databases and utilizes third party vendors to conduct mailings and solicitations.

Member benefits are being developed in conjunction with member research.

Experienced professionals are behind the building of non-dues revenue programs.

Participation is up to each member.
ANY QUESTIONS?

PRESENTATION BY
PAM NORMAN
SIGANTURE PROJECTS

PRESENTATION BY ELIZABETH WARREN
• Takes place annually or is recurring
• Enhances the Kiwanis brand
• Demonstrates significant impact on the community in terms of funds raised or children served
• Strengthens membership and partnership opportunities
Kiwanis Club of Wan Hua, Taiwan District
The “Kiwanis Children’s Film Festival” started in 1994, when the Wan Hua Kiwanis Club discovered that many children had no place to go during their hot summer vacations.
國際同濟會
台灣總會北市區
真心 創新 樂觀 奉獻
情感真情 快樂社服

2014
7.3 → 8.15

LOVE
童心影展

用電，拉起親子的心橋
DEEPER CRITERIA

• Meet the definition we just went over
• Be a service project, fundraiser or event
• Benefit children
• Follow proper brand guidelines
Kiwanis Club of Massapequa, New York District

The Kiwanis Club of Massapequa knew it could no longer look the other way. Heroin abuse was happening in their community, and even families within the club were dealing with the horrific effects of addiction. So the club decided to do something about it.
• Include at least one Kiwanis partner
• Involve other civic partners or community stakeholders
Kiwanis Club of Des Moines, Nebraska-Iowa District
Little league baseball is a rite of passage for many children, and the Kiwanis Miracle League at Principal Park in Des Moines makes it possible for kids who live with disability to take a turn at bat and run the bases.
December 1  
Submissions open

March 1  
Submission deadline

March 31  
Top ten selected by committee

June 29  
Bronze, Silver and Gold winners announced at the Signature Project Recognition Program at the International convention
TIPS

- Define who is the leader.
- Ask your LTGs for help and suggestions.
- Pay attention to deadlines. No exceptions.
- Work with past governors – what worked?
- Work with current governors to learn the process – be ready for your year.
SIGNATURE PROJECT TOOLKIT

STEP 1
CHOOSE A PROJECT TO BENEFIT KIDS
Choose a project that will last for years to come and your Kiwanis club will be known for throughout the community.

STEP 2
BRING YOUR PROJECT TO LIFE
Now that your club has selected a project, it's time to start the project that will help children.

STEP 3
WORK WITH OUR PARTNERS
We have created partnerships that align with our mission and preserve the trust of our members and community.

STEP 4
GET BUDGET-BOOSTING HELP
These resources help clubs save money and stretch their dollars. There's a large selection and a little bit of everything.

STEP 5
REPORT YOUR SUCCESS
Reporting qualifies clubs for special recognition and helps Kiwanis form more partnerships in support of signature projects.

kiwanis.org/signatureprojecttoolkit
ANY QUESTIONS?

PRESENTATION BY
ELIZABETH WARREN
• 28% were familiar with Kiwanis
• 67% had a favorable opinion of Kiwanis
• 12% could correctly identify our mission
• 9% said they would consider joining
• Belief in the mission
• Local and global
• Helps children
• Clean water, poverty, maternal and child health
KIWANIS’ BRAND

Kiwanis
WHAT IS A BRAND?
Club meetings
Events
Service projects
Members
Logo
Messaging
Media
Social media
Websites
Anything else tied to our name—at any time
CONSISTENCY
LET’S SING.
kiwanis.org/brand
THE ELEVATOR SPEECH

KIDS NEED PEOPLE TO LOOK OUT FOR THEM.

Kiwanis helps kids around the world. Local clubs look out for our communities, and the international organization takes on large-scale challenges, such as disease and poverty. We are generous with our time. We are creative with our ideas. We are passionate about making a difference. And we have fun along the way.
Kiwanis.org/brand

**PRIMARY LOGO**

A 2-color: Blue

Kiwanis

**VARIATIONS**

**THIS LOGO IS AVAILABLE IN TWO FORMATS.**

WHEN PEOPLE SEE THE PRIMARY KIWANIS LOGO USED CONSISTENTLY AND CORRECTLY OVER TIME, THEY'LL GET TO KNOW IT AND START RECOGNIZING YOUR CLUB. WHATEVER YOU'RE MAKING, INCLUDE THE LOGO AND BUILD YOUR BRAND!

A 2-color: Blue

1-color blue

Kiwanis

1-color black

Kiwanis

Reverse

Kiwanis

**HORIZONTAL**

This is the go-to logo for 99.9 percent of the things you'll make.

**VERTICAL**

These logos work for thin vertical banners, bookmarks and the sleeves of long-sleeved T-shirts.

IF YOU DON'T SEE A VERSION OF THE LOGO HERE, DON'T DO IT.

The logo is the logo. That’s how we make it instantly recognizable to people. When it's squished, stretched or otherwise altered, it loses its power. And so does the Kiwanis brand.

All approved logos are available for download in a variety of formats. Visit kiwanis.org and type "logos" into the search field.

For specific logo questions, please email brand@kiwanis.org.
KNOCKOUT HTF67 IS FOR HEADLINES.
USE KNOCKOUT HTF69 FOR SHORT SUBHEADS.

DON'T HAVE ACCESS TO THE PRIMARY FONTS?
USE THESE OPTIONS FOR INTERNAL COMMUNICATIONS AND CLUB NEEDS.
THE PIN.

THE PIN IS A SYMBOL OF COMMITMENT AND CAMARADERIE. THIS 3D IMAGE ADDS DEPTH AND A DOSE OF REALISM TO KIWANIS MESSAGING. THIS TREATMENT IS CONSIDERED AN ALTERNATE LOGO AND, THEREFORE, SHOULD NOT BE ACCOMPANIED BY THE PRIMARY LOGO OR WORDMARK.

The Pin logo should always be set at a tilt of 15 degrees. It may be set either to the left or right; however, a left tilt is recommended for most applications as this configuration gives the "Kiwanis International" text the preferred angle for readability.

The Pin should always have a short, soft drop shadow as shown—that falls off to the bottom left.

The Pin should only be used in 4-color applications.

DON’T USE THE PIN SMALLER THAN THE MINIMUM SIZE SHOWN HERE.

THE SEAL.

THE SEAL HAS BEEN A PART OF KIWANIS FROM THE START.

Our Seal can be used as a design element, or as a stand alone graphic on wearables and merchandise. When it’s used as a design element, it should always be set at a tilt of 15 degrees—either to the left or right; however, a left tilt is recommended for most applications as this configuration gives the "Kiwanis International" text the preferred angle for readability. When the seal is used as a stand alone graphic on t-shirts, coffee mugs, ball caps, etc. do not tilt it. Keep it upright.

Do not include the primary logo or wordmark when the seal is used as a design element.

The Seal looks best when used at a 15% screen of black on Kiwanis blue.

If used on a solid background color, The Seal should be employed subtly. (See the recommendations below.)

The Seal can also be cropped, but readability must be maintained.
BUT WHAT ABOUT...

- International President theme
- Governor theme
• Brand Book
• Online/self-serve
• People
• Key Messages
• Ready to order
“Kids Need Kiwanis” is Kiwanis International’s brand campaign. The goal of the campaign is to make it clear that Kiwanis serves children and that we have fun together. Use the TV, radio, print, billboard and digital materials in your club or district social media, your website, local digital media or as traditional advertising or public service announcements (PSA). These materials are meant to be fun—and sometimes funny—to grab attention and show that while Kiwanis takes our work seriously, we don’t take ourselves seriously. We have fun. We laugh. We meet kids where they are, whatever and wherever they are.
CUSTOM LOGOS

Let Kiwanis International create a custom logo or anniversary logo using current Kiwanis International brand guidelines. By aligning your club, division or district’s image with Kiwanis’ we present a consistent, strong brand to others.

To get your free custom logo, simply complete the form below. Within 20 business days of submitting your logo request, you will receive a proof of your new logo. Please review it carefully then reply to the email with the proof for final art. Your final logo package will be delivered within 20 business days of your final sign off. Logos will be provided in various styles in .JPEG, .PNG and .EPS file formats.

For any questions or concerns, please contact brand@kiwanis.org.

Examples of logos:

Kiwanis

Club of Anytown

Clubs, divisions or districts who request a custom logo will receive the version shown above.

Club is 100 years

Clubs or districts celebrating a 25th, 50th, 75th or 100th anniversary may request this logo. Additionally, click here to download a customizable template to request an official proclamation for your club’s anniversary.

REQUEST YOUR CUSTOM LOGO
Kiwanis brand book

The Kiwanis brand reflects our organization's traditions and its time-tested mission. At the same time, it's the latest statement of who we are. The Kiwanis "look"--including logo, colors and typefaces--is an important part of our brand. How we talk about Kiwanis matters just as much.

The Kiwanis brand book includes information about:

- Fonts: new and classic options
- Colors: featuring a brighter Kiwanis gold
- Messaging: How to talk or write about Kiwanis
- Production: Tips on working with local vendors

Download the Kiwanis brand book.
Get Kiwanis family logos and branding elements.
Need help with a logo? Check out the Logo Learning Center.
Need a custom logo for your Kiwanis club? Order one for free.
Download photos for your club or district communications. (password: Kiwanis)
Download a template to use for PowerPoint presentations.

Video/TV

- Kids Need Kiwanis brand 1:18 (best for use online or in social media)
- Kids Need Kiwanis :30 (use for ad, public service announcement, online or social media)
- The Last Straw :30 (use for ad, public service announcement, online or social media)
- Paintin' and Pickin' :30 (use for ad, public service announcement, online or social media)
CUSTOM LOGOS

Kiwanis International is proud to offer a free custom logo service to clubs, divisions, and districts. This service is designed to help Kiwanians align their local and national image. By following the guidelines for using the Kiwanis logo, clubs and districts can present a consistent, strong brand to others.

To get your free custom logo, simply complete the form below. Within 20 business days of submitting your logo request, we will provide a proof of your new logo. Please review it carefully, then reply to the email with your final approval. Your final logo package will be delivered within 20 business days of your final sign off. Logos will be provided in various styles in .JPG, .PNG, and .EPS file formats.

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Kiwanis International Online

MEMBER RESOURCES

- Member Login
- The Formula
- Training
- District Reports
- Events
- Governance
- Awards and Recognition
COMMUNICATIONS
Find out why it's important to communicate regularly with your members, and discover resources and tools to help you keep them engaged.

MEMBER OUTREACH
Learn more about how to engage potential new Kiwanis members -- and how to keep your current members feeling motivated and valued.

MEDIA RELATIONS
Find out how you can best work with the media to tell your club’s story. Learn how to react in a crisis should you find yourself facing one.
SOCIAL MEDIA

Learn more about how social media is changing the way you communicate with your club members and community. Discover how your club can use different social channels to tell your story.

VIEW

CLUB WEBSITE

Find out how to build or update your Kiwanis club or district website. Get useful tools and tips, including content ideas and image recommendations.

VIEW

KIWANIS BRAND CAMPAIGN
KIWANIS BRAND CAMPAIGN

Learn about the new “Kids Need Kiwanis” new brand campaign.

LOGOS AND ASSETS

Learn how to correctly use Kiwanis club and program logos, and download various logo files for your club’s use.
KIWANIS BRAND CAMPAIGN

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Use the TV, radio, print, billboard and digital materials in your club or district social media, your website, local digital media or as traditional advertising or public service announcements (PSA). These materials are meant to be fun—sometimes funny—to grab attention and show that while Kiwanis takes our work seriously, we don’t take ourselves seriously. We have fun. We laugh. We meet kids' needs, wherever and whenever they are.

PROBLEM SOLVER IN TRAINING.
Kiwanis brand book

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Paintin' and Pickin': 30 (use for ad, public service announcement, online or social media)

15-second videos (Use these short videos online or in social media)
CHILDHOOD DOESN’T COME WITH A ROAD MAP.

KIDS NEED KIWANIS
• District PR Coordinators
• Kiwanis International Staff
• Other Kiwanis members
District’s PR leader

Understand media relations, the brand, advertising and more

Available to train at the district level and assist clubs

Serve as an expert resource to clubs and the district

Ensure PR is part of the district’s overall plan

Liaison between clubs/the district and Kiwanis International

Serve in a multi-year role
Communications team

 Exists to help clubs with branding, PR, marketing, advertising and other communications needs

 Social media

 They want to help you!
• Open Facebook group: Kiwanis PR & Image
• Forums and workshops
• Your district and divisional meetings
The three most important messages you want your audience to remember.
KEY MESSAGES

• Write them out—get help
• Practice and know them
• Write supporting talking points
• Make them your first and last statements
• Practice “bridging”
• Join Us brochure (free)
  ▪ kiwanis.org/store
  ▪ 2 packages of 25

• Kids Need Kiwanis brochure (direct charge)
  ▪ kiwanis.org/POD
  ▪ Print on demand
  ▪ Customized with club info
  ▪ $25 for 25 (price decreases with larger orders)

• Do Good Cards (direct charge)
  ▪ kiwanis.org/POD
READY TO ORDER

THANKS.
The world needs more of that.
RESOURCES

- kiwanis.org/brand
- kiwanis.org/clubs/member-resources
- kiwanis.org/store
- kiwanis.org/POD
- Facebook: Kiwanis PR & Image
- PR@Kiwanis.org
- 800-549-2647 or +1 317-875-8755 ask for communications
ANY QUESTIONS?

PRESENTATION BY
AMY WISER, CCO
KIWANIS STRATEGIC PLAN OVERVIEW

PRESENTATION BY
STAN SODERSTROM, EXECUTIVE DIRECTOR
STRATEGIC PLANNING

• Strategic thinking
• High level road map
• Keeps us focused on what’s important
“Begin with the end in mind.”

-Stephen Covey
Motto:

Serving the Children of the World
Defining statement:

Kiwanis is a global organization of volunteers dedicated to improving the world one child and one community at a time.
STRATEGIC PLANNING

Vision statement:

**Kiwanis will be a positive influence in communities worldwide...**

So that one day, all children will wake up in communities that believe in them, nurture them and provide the support they need to thrive.
STRATEGIC PLANNING

Four important concepts:

- Kiwanis network of service
- Kiwanis community
- Signature project
- SLP as partners in service
STRATEGIC PLANNING

Four priority areas:

1. Inspiration - Membership & Engagement
2. Impact - Community Impact
3. Image - Our Kiwanis Image
4. Investment - Financial Viability
STRATEGIC PLANNING

• Updating the plan
• What has been accomplished?
• What is prioritized for 2017-18?
• What needs to be modified or added?
I. MEMBERSHIP AND ENGAGEMENT

Build, retain and support a growing Kiwanis membership network
I. MEMBERSHIP AND ENGAGEMENT

- Increase membership
- Open clubs
- Develop leaders
- Invite & strengthen around a service focus
- Increase the value of the member experience
- Build a strong network of local & global partners
2. COMMUNITY IMPACT

Perform meaningful service, with service to children as our priority
2. COMMUNITY IMPACT

- Align relevant service with community needs
- Encourage a signature project in every club
- Encourage hands-on service
- Empower and support growth in our Service Leadership Programs

  KI programs: Aktion Club and CKI
  KYP programs: Key Club, Key Leader, Builders Club, K-Kids
  Key Club and CKI alumni engagement
3. OUR KIWANIS IMAGE

Enhance the Kiwanis image and brand worldwide
3. OUR KIWANIS IMAGE

- Increase name recognition worldwide
- Increase knowledge of our mission, both internally and externally
- Unify all Kiwanis brands
- Promote the Kiwanis vision and vivid description as supported by The Objects of Kiwanis
4. FINANCIAL VIABILITY

Ensure financial viability and responsible stewardship
4. FINANCIAL VIABILITY

- Exercise proper stewardship of resources
- Build a non-dues revenue base
- Simplify the organizational dues structure and processes
- Develop financial education
ANY QUESTIONS?

PRESENTATION BY
STAN SODERSTROM, EXECUTIVE DIRECTOR
JUST THE NUMBERS

PRESENTATION BY
JEFF OATNESS, COO
-2.92%

Average annual membership loss
The high point in Kiwanis membership which occurred in 1992
The last year in which the organization’s membership stood at its current total
Percentage of membership lost worldwide since 1992, equal to 135,000 members
Percentage of clubs that are below charter strength
• Number of years since females were first officially accepted into Kiwanis membership

• Percentage of Kiwanis members located outside of the U.S. & Canada
Percentage of members in Kiwanis that are female
Average age of a Kiwanis member
• Average ages of a Kiwanis member (male & female)

• Up from 58 & 53 just seven years ago
The total number of districts that in the last 6 years have shown growth in in the US and Canada
### Percentage of membership lost since 1992, in North America

<table>
<thead>
<tr>
<th>DISTRICT</th>
<th>1991-92</th>
<th>2016-17</th>
<th>% + or - since '92</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALABAMA</td>
<td>6,513</td>
<td>3,131</td>
<td>-51.93%</td>
</tr>
<tr>
<td>CAL-NEV-HA</td>
<td>21,564</td>
<td>11,578</td>
<td>-46.31%</td>
</tr>
<tr>
<td>CAPITAL</td>
<td>9,922</td>
<td>4,363</td>
<td>-56.03%</td>
</tr>
<tr>
<td>CAROLINAS</td>
<td>12,318</td>
<td>5,665</td>
<td>-54.01%</td>
</tr>
<tr>
<td>FLORIDA</td>
<td>15,039</td>
<td>6,814</td>
<td>-54.69%</td>
</tr>
<tr>
<td>GEORGIA</td>
<td>10,643</td>
<td>5,585</td>
<td>-47.52%</td>
</tr>
<tr>
<td>IL - E IOWA</td>
<td>12,358</td>
<td>6,364</td>
<td>-48.50%</td>
</tr>
<tr>
<td>INDIANA</td>
<td>10,502</td>
<td>5,105</td>
<td>-51.39%</td>
</tr>
<tr>
<td>KANSAS</td>
<td>4,322</td>
<td>1,795</td>
<td>-58.47%</td>
</tr>
<tr>
<td>KY - TN</td>
<td>8,454</td>
<td>4,497</td>
<td>-46.81%</td>
</tr>
<tr>
<td>LA-MS-W TENN</td>
<td>6,393</td>
<td>4,085</td>
<td>-31.13%</td>
</tr>
<tr>
<td>MICHIGAN</td>
<td>9,015</td>
<td>4,246</td>
<td>-52.90%</td>
</tr>
<tr>
<td>MINN-DAK</td>
<td>9,468</td>
<td>3,797</td>
<td>-59.90%</td>
</tr>
<tr>
<td>MO-ARK</td>
<td>8,852</td>
<td>4,534</td>
<td>-48.78%</td>
</tr>
<tr>
<td>MONTANA</td>
<td>1,902</td>
<td>1,078</td>
<td>-43.32%</td>
</tr>
<tr>
<td>NEB - IOWA</td>
<td>9,285</td>
<td>5,126</td>
<td>-44.79%</td>
</tr>
<tr>
<td>NEW ENGLAND</td>
<td>8,496</td>
<td>3,617</td>
<td>-55.07%</td>
</tr>
<tr>
<td>NEW JERSEY</td>
<td>4,906</td>
<td>1,474</td>
<td>-70.33%</td>
</tr>
<tr>
<td>NEW YORK</td>
<td>13,344</td>
<td>6,467</td>
<td>-51.54%</td>
</tr>
<tr>
<td>OHIO</td>
<td>15,047</td>
<td>6,776</td>
<td>-54.97%</td>
</tr>
<tr>
<td>E C &amp; C</td>
<td>11,628</td>
<td>6,607</td>
<td>-43.18%</td>
</tr>
<tr>
<td>PACIFIC NW</td>
<td>15,247</td>
<td>6,960</td>
<td>-54.35%</td>
</tr>
<tr>
<td>PENNSYLVANIA</td>
<td>8,775</td>
<td>3,495</td>
<td>-60.17%</td>
</tr>
<tr>
<td>ROCKY MTN</td>
<td>4,965</td>
<td>2,423</td>
<td>-51.20%</td>
</tr>
<tr>
<td>SOUTHWEST</td>
<td>6,350</td>
<td>2,267</td>
<td>-64.30%</td>
</tr>
<tr>
<td>TX - OK</td>
<td>16,211</td>
<td>6,700</td>
<td>-58.67%</td>
</tr>
<tr>
<td>UTAH-IDAHO</td>
<td>2,708</td>
<td>1,106</td>
<td>-59.16%</td>
</tr>
<tr>
<td>WEST CAN</td>
<td>2,121</td>
<td>883</td>
<td>-58.37%</td>
</tr>
<tr>
<td>WEST VIRGINIA</td>
<td>1,885</td>
<td>684</td>
<td>-63.71%</td>
</tr>
<tr>
<td>WIS-UPPER MI</td>
<td>9,912</td>
<td>4,092</td>
<td>-58.72%</td>
</tr>
<tr>
<td><strong>North America</strong></td>
<td><strong>278,753</strong></td>
<td><strong>131,514</strong></td>
<td><strong>-52.82%</strong></td>
</tr>
</tbody>
</table>
Total number of Kiwanis administrative units that showed growth last year in the entire Western hemisphere
1992 = 2,431
2017 = 1,702
A loss of 30%
1992 = 1,862
2017 = 701

A loss of 62%
1992 = 0
2017 = 598
1992 = 0
2017 = 359
Total number of European members –

This number has not changed in 15 years
1992 = 1,614
2017 = 2,508

A gain of 55%
1992 = 9,084
2017 = 4,161

A loss of 54% of their membership
1996 = 5,506
2017 = 4,296

A loss of 22% of their membership
1992 = 1,892
2017 = 2,977

A gain of 57%
1992 = 1,339
2017 = 804

A loss of **40%**
1992 = 3,150
2017 = 2,531

A loss of 20%
1992 = 1,604
2017 = 2,030

A gain of 27%
1992 = 2,217
2017 = 1,138

A loss of 49%
1992 = 4,915  
2017 = 7,287  
A gain of 48%
1992 = 0
2017 = 537

Grew 32% last year & opened 5 clubs
The annual average number of districts, over the last 5 years, that have shown growth in one of those years in the Asia-Pacific region
The Taiwan district’s total membership
1992 = 5,670
2017 = 15,841
A gain of 179%
1992 = 1,517
2017 = 842

A loss of 44% of their membership
1992 = 1,405
2017 = 1,963

A gain of 40%
1992 = 1,159
2017 = 342

A loss of 70%
1992 = 1,470
2017 = 641

A loss of 56%
1992 = 3,317
2017 = 4,217
A gain of 27%
1992 = 1,679
2017 = 1,898

A gain of 13%
1992 = 0
2017 = 1,379
1992 = 0
2017 = 302

Opened 11 clubs last year & grew 144% last year
THE FORMULA

LOVE IT. SHARE IT. LIVE IT.
- Approved April 2013
- Five year program (October 2013-18)
- Four million dollar investment
- 2,700 additional leaders
- 1,750 clubs (350-400 annually)
- Increase per club membership by a net of ten members
THE FORMULA
LOVE IT. SHARE IT. LIVE IT.

% increase in annual # of clubs opened since The Formula began

% reduction in the annual loss of members since The Formula began

33\frac{1}{3}

40
Average member retention percentage over the last decade
Number of people that joined Kiwanis in 1992
Number of people that joined Kiwanis in 2016
Percentage of Kiwanis clubs that close within five (5) years of being opened
The average number of clubs opened annually over the last decade.
The average number of clubs closed annually over the last decade
Percentage of organizational revenue that comes from member dues and fees
Total number of Kiwanis clubs in the world
Average number of members per Kiwanis club, down from 31 just 8 years ago
Average number of members per NEW Kiwanis club, down from 25 just 8 years ago
Percentage of members that sponsor at least one member in a typical year
Percentage of new members that have a sponsor reported with their application
Percentage of annual membership deletions that occur in the months of September and October
You.
ANY
QUESTIONS?

PRESENTATION BY
JEFF OATESS, COO
MEMBERSHIP

GOALS

PRESENTATION BY
TATIANA DAY
“You can’t manage what you don’t measure and you can’t improve what you don’t manage.”

Jeff Boss, Forbes Magazine
Having set goals makes us more effective because:

- it triggers behaviors
- guides your focus
- sustains momentum
- aligns your focus
- develops self-mastery
• Area Directors
• District Membership Chair(s)
  • The Formula, Eye of the Tiger
• Past Governors and Lieutenant Governors
• 5 year trends
• 2017-18 Club Opening Goals
<table>
<thead>
<tr>
<th>Club Name</th>
<th>Division Number</th>
<th>Division Name</th>
<th>Club Status</th>
<th>2013-14</th>
<th>2014-15</th>
<th>2015-16</th>
<th>2016-17</th>
<th>Five-Year Net Membership</th>
<th>Five-Year Net %</th>
<th>Per-Year Average Net Membership</th>
<th>One-Year Net Membership</th>
<th>One-Year %</th>
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<td>A.</td>
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</tbody>
</table>

### Division totals

- **Total Net Membership:** 184,888
- **Total Net %:** 184,888
- **Per-Year Average Net Membership:** 184,888
- **One-Year Net Membership:** 184,888
- **One-Year %:** 184,888
• Set for the current governors by Eye of the Tiger team

• Benchmarking foundation for your planning
What are some ways we can use these reports?
ANY QUESTIONS?

PRESENTATION BY
TATIANA DAY
ANY QUESTIONS?

PRESENTATION BY BRIAN TENCINGER
MEMBERSHIP

PRESENTATION BY
PRESIDENT JIM ROCHFORD
ANY QUESTIONS?

PRESENTATION BY
PRESIDENT JIM ROCHEFORD
KIWANIS
SHOPPING
TRIP
1. Pick up envelop with buttons inside
2. Go into the hallway and look at each table
3. Use buttons to “purchase” items by placing one button in the corresponding bowl
4. Write on your envelope which items you purchased
5. Return to your seats
What do these buttons represent?
How did you choose which items to “buy”?  

Was the process easy?
How can we do prevent future Kiwanians from having to make difficult financial decisions?
FINANCIAL STEWARDSHIP

PRESENTATION BY
BOB BRODERICK, CFO
OVERVIEW

• Legal Duties - Exercise proper stewardship of resources
• Simplify the organizational structure and processes
• Internal control defined
• Major transaction cycles
• Fraud defined
• Significant risk areas
• How to mitigate those risks – Best practices
• Questions
Legal duties of the board

- Duty of Care
- Duty of Loyalty
- Duty of Obedience
DUTY OF CARE

• Be familiar with the organization’s finances and activities
• Participate regularly in its governance and in risk assessment and strategic planning discussions
• Ensure the organization has sufficient internal controls and written policies that safeguard, promote and protect assets
• Act in **GOOD FAITH** using “degree of diligence, care and skill” as would a prudent person in a similar situation.
DUTY OF LOYALTY

- Be aware of the “Conflict of Interest policy”
- Act in **THE BEST INTEREST** of the organization
- Disclose any real or possible conflicts
• **Comply** with all laws and regulations
• Dedicate resources to fulfill the organization mission
• Ensure the organization does not engage in unauthorized activities
FIDUCIARY RESPONSIBILITIES

• Steward the resources for the long term
• Be familiar with finances and activities
• OVERSEE matters critical to the organization’s health
• INTERNAL FINANCIAL CONTROLS
  - Ensure that written policies exist to safeguard, promote and protect assets
PROPER STEWARDSHIP

- Understand District Finances
  - Balance Sheet – how much $ in the bank, investments, how much do we owe, etc.
  - Income Statement – what are the main revenue streams, cost drivers, how much $ did you make on an activity.

- Ensure Compliance with Laws/Policies
  - Tax Returns are Completed
  - Books are Audited

- Allocation of Resources
  - ROI on activities
  - Simplify business Structure and Process
What are your objectives?
What activities will be involved to achieve those objectives?
What are your resources and what is the cost of such resources?
Where will the money come from?
Internal controls defined

COSO defines internal controls as, "A process, effected by an entity’s board of directors, management and other personnel, designed to provide reasonable assurance regarding the achievement of objectives in the following categories:

- Effectiveness and efficiency of operations
- Reliability of financial reporting
- Compliance with applicable laws and regulations"

The Business Dictionary definition is, “Systematic measures (such as reviews, checks and balances, methods and procedures) instituted by an organization to (1) conduct its business in an orderly and efficient manner, (2) safeguard its assets and resources, (3) deter and detect errors, fraud and theft, (4) ensure accuracy and completeness of its accounting data, (5) produce reliable and timely financial and management information, and (6) ensure adherence to its policies and plans”
INTERNAL CONTROLS AND MAJOR TRANSACTION TYPES

• Cash disbursements
• Cash receipts
• Credit Cards
• Investing and financing (examples: fixed assets, debt, investments)
• Payroll
• An intentional act of deception
  ▪ Misappropriation of assets
  ▪ Intentional misreporting of financial results
SIGNIFICANT RISK AREAS

• Cash disbursements
  ▪ How are purchases authorized/approved and by whom?
  ▪ Who signs checks?
  ▪ Who mails/delivers checks?
  ▪ Who records cash disbursements?
  ▪ Who reconciles the bank statement?
  ▪ Who reviews the bank reconciliation?

Schemes: Personal Bills, Fictitious Suppliers, Kickbacks, Petty Cash Funds, Expense Reports
SIGNIFICANT RISK AREAS

• Cash receipts
  ▪ Who receives checks?
  ▪ Are checks restrictively endorsed immediately upon receipt?
  ▪ Who prepares the deposit ticket?
  ▪ Who takes the deposit to the bank?
  ▪ Who records cash receipts?
  ▪ Who reconciles the bank statement?
  ▪ Who reviews the bank reconciliation?
  ▪ Who does Write-offs

Schemes: Lapping, Forging checks received, Bogus bad debt write-offs or account adjustment
• Credit cards
  ▪ Credit cards represent a significant risk in most situations
  ▪ What policies are in place to guide use of credit cards?
  ▪ Who has access to credit cards?
  ▪ Who reviews the credit card statements?

Second Highest Occurrence of Fraud
What do pizza chains, horror movies and ski lodges have in common with rockets, satellites and space stations?

The U.S. National Aeronautics and Space Administration (NASA) has **paid for all these things.**
Figure 40: Position of Perpetrator — Frequency

Source: 2014 Association of CFE, Inc.
Figure 41: Position of Perpetrator — Median Loss

- Employee:
  - 2014: $75,000
  - 2012: $60,000
  - 2010: $80,000

- Manager:
  - 2014: $130,000
  - 2012: $182,000
  - 2010: $200,000

- Owner/Executive:
  - 2014: $500,000
  - 2012: $573,000
  - 2010: $723,000

- Other*:
  - 2014: $100,000
  - 2012: $250,000

**Other** category was not included in the 2010 Report.

Source: 2014 Association of CFE, Inc.
Figure 65: Education Level of Perpetrator — Median Loss

Source: 2014 Association of CFE, Inc.
### Figure 24: Frequency of Schemes Based on Industry

<table>
<thead>
<tr>
<th>Scheme</th>
<th>Banking and Financial Services</th>
<th>Government and Public Administration</th>
<th>Manufacturing</th>
<th>Health Care</th>
<th>Education</th>
<th>Retail</th>
<th>Insurance</th>
<th>Oil and Gas</th>
<th>Transportation and Warehousing</th>
<th>Services (Other)</th>
<th>Construction</th>
<th>Religious, Charitable or Social Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing</td>
<td>5.7%</td>
<td>19.1%</td>
<td>22.4%</td>
<td>29.0%</td>
<td>33.8%</td>
<td>10.4%</td>
<td>17.7%</td>
<td>24.5%</td>
<td>33.3%</td>
<td>26.9%</td>
<td>34.9%</td>
<td>32.5%</td>
</tr>
<tr>
<td>Cash Larceny</td>
<td>13.1%</td>
<td>10.6%</td>
<td>8.0%</td>
<td>12.0%</td>
<td>6.3%</td>
<td>15.6%</td>
<td>6.5%</td>
<td>2.0%</td>
<td>2.1%</td>
<td>11.1%</td>
<td>14.0%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Cash on Hand</td>
<td>18.3%</td>
<td>12.1%</td>
<td>7.5%</td>
<td>16.0%</td>
<td>16.3%</td>
<td>22.1%</td>
<td>1.8%</td>
<td>2.0%</td>
<td>10.4%</td>
<td>11.1%</td>
<td>7.0%</td>
<td>12.5%</td>
</tr>
<tr>
<td>Check Tampering</td>
<td>5.7%</td>
<td>5.7%</td>
<td>7.8%</td>
<td>21.0%</td>
<td>10.0%</td>
<td>7.8%</td>
<td>4.8%</td>
<td>4.1%</td>
<td>20.8%</td>
<td>17.8%</td>
<td>27.9%</td>
<td>35.0%</td>
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<tr>
<td>Corruption</td>
<td>37.3%</td>
<td>36.2%</td>
<td>54.3%</td>
<td>37.0%</td>
<td>36.3%</td>
<td>22.1%</td>
<td>33.9%</td>
<td>57.1%</td>
<td>29.2%</td>
<td>35.6%</td>
<td>46.5%</td>
<td>30.0%</td>
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<tr>
<td>Expense Reimbursements</td>
<td>4.1%</td>
<td>12.0%</td>
<td>7.8%</td>
<td>23.0%</td>
<td>31.3%</td>
<td>3.9%</td>
<td>4.6%</td>
<td>14.3%</td>
<td>14.0%</td>
<td>17.8%</td>
<td>27.9%</td>
<td>32.5%</td>
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<tr>
<td>Financial Statement Fraud</td>
<td>10.2%</td>
<td>5.0%</td>
<td>13.8%</td>
<td>8.0%</td>
<td>10.0%</td>
<td>6.5%</td>
<td>3.2%</td>
<td>12.2%</td>
<td>10.4%</td>
<td>6.7%</td>
<td>11.6%</td>
<td>7.5%</td>
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<td>Non-Cash</td>
<td>13.1%</td>
<td>17.7%</td>
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<td>8.6%</td>
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<td>16.3%</td>
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<td>16.7%</td>
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<td>18.6%</td>
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<td>Register Disbursements</td>
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<td>4.2%</td>
<td>6.7%</td>
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<td>Skimming</td>
<td>6.7%</td>
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<td>18.0%</td>
<td>20.0%</td>
<td>18.2%</td>
<td>23.8%</td>
<td>2.0%</td>
<td>6.3%</td>
<td>33.3%</td>
<td>7.0%</td>
<td>12.5%</td>
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</table>

Source: 2014 Association of CFE, Inc.
A TYPICAL PERPETRATOR

- White Male
- College – educated
- Intelligent
- Married
- Most Loyal Employee
• Segregation of duties
  - Access to assets
  - Recording responsibility
  - Monitoring responsibility

• If an individual has access to assets, and either recording or monitoring responsibilities, there is a lack of segregation of duties
• Perform and document review of account reconciliations
  ▪ Particularly important for bank reconciliations

• Consider having the unopened bank statement sent to someone other than the person responsible for reconciliation

• Review cancelled checks for appropriate signature, payee and amount

• Check signer(s) should not also be responsible for recording transactions and reconciling the bank account
  ▪ Simply put, don’t allow a single person to handle a cash transaction beginning to end
HOW TO MITIGATE THOSE RISKS – BEST PRACTICES

- Check stock should be safeguarded
- All disbursements should be approved by an individual other than the person that prepares the payment
- Ensure timely reconciliation of all accounts (especially bank accounts)
- Cash receipts should be deposited daily
- Checks should be restrictively endorsed immediately upon receipt
- If credit cards are present, strong policies and review are critical
PROTECT THE ORGANIZATION

- Fraud risk assessment
- Internal Controls
  - Segregation of duties
    - Access to assets
    - Recording responsibility
    - Monitoring responsibility
- External Review/Audit
- Review Tax Returns
- Establish “Perception of Detection”
• Find a financial expert for your district team:
  ▪ Someone with business and financial expertise
  ▪ Someone who can provide solid business and investment advice

• Gain financial education for yourself:
  ▪ YouTube, Google, Web, etc.
FOUR COMPONENTS OF GOOD FINANCIAL MANAGEMENT

1. Clear financial strategy (example: Dues income)
2. A plan to generate revenue (example: Open new clubs)
3. A financial management system (example: accounting software)
4. Suitable internal controls (examples: Segregation of Duties, Policies, Procedures, 990)
Thank you.

Your generosity and service helps children in many places, in many ways.
Kiwanis Children’s Fund

The Kiwanis Children’s Fund develops resources that transform the goodwill and vision of Kiwanians into programs that serve the children of the world.
So many foundations!

- **Club foundations** - local community needs
- **District foundations** - regional priorities
- **Kiwanis Children’s Fund** - projects that can benefit from the collective support of Kiwanians worldwide
Community foundation model:

• **Raise funds** from the community
• **Grant funds** to projects in the community
• **Provide services** to donors
• **Provide resources** to non-profit organizations in the community
Our volunteers

• **Board of Trustees** – Sets strategic policies designed to establish and implement the Children’s Fund mission

• **Ambassadors** – Provide critical connection between board, district chairs, and district advocates, and serve as resources in fundraising and volunteer training

• **District chairs** – Promote the five primary causes to secure unrestricted funds annually

• **District advocates** – Promote The Eliminate Project to achieve successful completion of the project by 2020
A great organization is one that delivers **superior performance** and makes a **distinctive impact** over a long period of time...

For a social sector organization, performance must be assessed relative to mission, **not financial returns**...

The critical question is...

“How effectively do we deliver on our mission and make a distinctive impact, relative to our resources?”

Jim Collins,

*Good to Great and the Social Sector*
Your investment

- **16 different grant programs** in 2016-17
- **US$3,992,725** to Kiwanis causes
- Helped the Kiwanis family carry out more than **170 projects**
Your primary causes

• Disaster relief
• Service Leadership Programs
• Club and district service projects
• Sustained elimination of IDD
• The Eliminate Project
Disaster relief

• Directly supports Kiwanis-led relief efforts following natural disasters

• Every disaster is unique. We work with Kiwanis leaders to achieve desired outcomes

• Food, bottled water, clothing, first aid supplies, cleaning supplies and toiletries

• Granted US$298,000 since 2013
Texas-Oklahoma District

- Hurricane Harvey
- Funds purchased pallets of supplies for clubs throughout Texas to distribute locally

St. John’s Antigua Kiwanis Club

- Hurricane Irma
- Funds purchased baby food, wipes, diapers, gloves, cleaning supplies

Kiwanis Club of Bridgetown, Barbados

- Hurricane Maria
- Funds purchased water, baby formula, diapers
Service Leadership Programs

- **Aktion Club** – Training and Leadership Conference
- **Circle K International** – Leadership Academy
- **Key Leader** – Key Leader program support and scholarships
- **Breakthrough** – Key Club service immersion experience
Service Leadership Programs

• Since 2012 more than 40% of grants have directly supported SLPs

• SLPs perform service activities in 6,147 communities

• 24,588 impactful acts of service per year
CLUB AND DISTRICT SERVICE PROJECTS
Club and district service projects

- Recurring, sustainable, Kiwanis-led projects
- Health, education and youth leadership development
- Previous projects: backpacks of school supplies, sensory room, weekend food packs
IODINE DEFICIENCY
DISORDERS
Sustained elimination of IDD

• Eliminate the leading preventable cause of mental disabilities
• Raised more than US$100 million
• Leveraged additional $49 million through USAID
• Household use of iodized salt has increased from 20% to 70%
• Some population groups increase IQ by 13 points
Sustained elimination of IDD

- Kiwanis is a member of the Iodine Global Network
- Ongoing efforts include monitoring salt production, advocacy, and educational programs aimed at local governments
- Recently granted US$340,000 to support sustainability efforts in Cambodia
THE ELIMINATE PROJECT
The Eliminate Project

- **1987**: UNICEF and WHO identified MNT as “silent killer” of 800,000+ children worldwide each year
- **2000**: MNT elimination re-emerges as a UNICEF priority - 59 countries at risk
- **2000-2010**: UNICEF eliminates MNT in 20 countries - 39 countries at risk
- **2010**: Kiwanis International partners with UNICEF to join the fight
- **2010-2015**: UNICEF eliminates MNT in 20 more countries - 19 countries at risk
- **Today**: 16 countries remain at risk
We’re winning the fight!

• To date, we’ve raised $72.8 million in cash

• Haiti is the most recent country to eliminate MNT; entire Western Hemisphere has now been validated from MNT

• Kiwanis support doubled the speed of UNICEF’s progress

• Infant mortality rate due to MNT has decreased 96% since 1987 (current: 34,000)

• No country that has achieved elimination has gone back on the list
### Urgent funding needs

<table>
<thead>
<tr>
<th>Country</th>
<th># Targeted Women</th>
<th>Unfunded Amount</th>
<th>Vaccination Round</th>
<th>Vaccination Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yemen</td>
<td>480,053</td>
<td>$960,106</td>
<td>Rounds 1 &amp; 2</td>
<td>Q4 2017</td>
</tr>
<tr>
<td>Pakistan</td>
<td>2,208,420</td>
<td>$2,208,419</td>
<td>Round 2</td>
<td>Q4 2017</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,688,473</strong></td>
<td><strong>$3,168,525</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Financial Overview

- **District pledges**: $14,845,839 (59%)
- **Club pledges**: $7,668,846 (30%)
- **Individual pledges**: $2,817,492 (11%)

Total pledges: $25,332,177
District Grant Program

• Eligible for up to 15% of district’s total undesignated giving in previous Kiwanis year

• Grant may be used for: health, education, youth leadership development

• Must have a Kiwanis Children’s Fund district chair in place

• Applications due March 1; Grant reports due September 1
Club Grant Program

- Two-step process - Letter of Inquiry and full application
- LOI – early indication of project’s potential for funding
- Library of online resources
- Materials translated in seven languages
- Three funding cycles - June 1, October 1, January 1
- Community needs assessment to gather data and inform project
- 1:1 assistance from Children’s Fund staff
Trustee selection process

- One of three annual vacancies will be Children’s Fund district seat
- Qualifying district may submit three names to Joint Committee

Criteria:
- Highest per-member annual giving average over a three-year period
- Highest total annual giving average over a three-year period
- Children's Fund district chair invited to provide updates in district board meetings and events
- Completed payment of established “fair share” to The Eliminate Project
District Chair selection process

• Process is designed to maximize your district’s fundraising success
• Three-year appointment
• Nominated by district, selected by Children’s Fund Board of Trustees
• Deadline for district nominations: January 5, 2018
• Announcement will be made following the February meeting of the Board of Trustees
We can help!

- Fundraising strategies
- District/club foundation management
- Grant-making processes
- Speaking and presentations
Consider making a gift

Make life-changing impact by giving to the Kiwanis Children’s Fund:

• Individual Gifts
• Club Gifts
• Planned Gifts
Questions?