KSA and Student Leader Training

May 6, 2017
Wieboldt Hall
Student Leader Training Objectives

Empower and assist students to become better leaders, influencers, and role models through increased understanding and alignment to Kellogg’s purpose.
Kellogg Purpose

To educate, equip, and inspire brave leaders who build strong organizations and wisely leverage the power of markets to create lasting value.
“My favorite things in life don’t cost any money. It’s really clear that the most precious resource we all have is time.”

- Steve Jobs
GRPIR

Goals

Roles

Purpose

Interpersonal Relationships
Benefits of Being a Student Leader

• Leadership opportunities in a low-risk environment
• Partnership with administration to bring ideas to life
• Exposure to key faculty and administrative leaders
• Opportunities to collaborate with Full-Time students
• Play a key role in delivering a best in class student experience
Agenda

10:00 – 10:20  Introductions and Leading with a Purpose
   Courtney Williams, Associate Director, Student Life

10:20 – 10:50  Event Planning and Communications Process
   Clare Bukowski, Event Coordinator, Student Life
   Kerry Van Malderghem, Assistant Director, Student Life

10:50 – 11:00  Driving Employer Engagement
   Tino Chitiga, Assistant Director, Business Development, CMC

11:00 – 11:10  Break

11:10 – 11:25  Club Best Practices
   Erin Landy, Marketing Club

11:25 – 11:35  Understanding the Financials
   Adam Gasior, KSA VP of Finance

11:35 – 11:50  Leveraging Kellogg Groups
   Kerry Van Malderghem, Assistant Director, Student Life

11:50 – 12:00  Wrap Up, Questions and Answers
   Courtney Williams, Associate Director, Student Life

12:15 – 1:30  Lunch, KSA and Club Leader Forum
Get to Know Each Other

• Name

• Club & Leadership Position

• Program & Graduation Year
Event Planning and Communications Process

Clare Bukowski, Event Coordinator, Student Life
- On Campus Events

Kerry Van Malderghem, Assistant Director, Student Life
- Off Campus Events
Event Planning – On Campus Events

• Keys to success:
  – Student Event Calendar
  – Event Request Form
Event Planning – On Campus Events

Quarter before your event

- Consult the student event calendar
- Confirm your speaker
- Complete an event request form

*YOU MUST BOOK AN EVENT WITH AT LEAST 2 WEEKS NOTICE*
Event Planning Process – On Campus Events

Event Request Form
- Tech
- Room & Layout
- Catering w/ Budget
- Parking pass/nametag/speaker gift

Email Communication
- CONFIRMATION
- Catering Selection (2 weeks)
- Final Headcount for Catering (1 week)
Resources for a successful event – On Campus

• Student Event Calendar
• Club Officer Resources
• Wildcard scanner
• Promoting your event
Event Planning – Off Campus

More involved - More time - More planning

We’re here to help guide you through the process (notes courtesy of outgoing KSA VP of Social Daniela Scarpetta!!).
Event Planning – Off Campus
The Top-10 List

1. **Select a venue** - any that you want! It doesn't have to be in the list of pre-contracted venues. As you may recall, this year we have done events at Rock Bottom, Old Crow, Underground and Pinstripes.

2. **Reach out to the venue** you want to work with and have them **put together a quote/contract for you** (for the food and drinks that you want, specify time and number of people).

3. Make sure you tell the venue that we are a **tax exempt organization** (Northwestern University) so tax should not be included in the quote. Only have them include the tip in the quote. To prove that we are tax exempt, send the tax exempt form to the venue with the venue's name.
4. The venue needs to **sign the Alcohol Rider** and send it back to you.

5. The venue needs to provide us with a **Certificate of insurance**, naming Northwestern University as the insured for $3 million dollars (just ask them for it...venue already has their own template for this).

6. The venue needs to send you a **signed copy of the quote/contract** signed by them. Some venues send you the proposal online (don't sign this! Ask them for a paper copy because only Northwestern Staff is allowed to sign this).

7. You will **fill out Exhibit B** document (vendor doesn't have to sign it).
8. Once you have all of these forms ready, (signed contract by venue, alcohol rider, certificate of insurance, Exhibit B) submit them to Courtney Williams for approval.

9. Once the paperwork is approved by Northwestern (takes about 2 weeks), send the executed copies back to the vendor. It takes 5-10 business days for a check to be cut to them once Northwestern signs the forms. Once Kellogg has the check, Courtney will FedEx it to the venue.

10. Another word of advice is NEVER pay the venue with your own credit card. If the bill once you are at the venue exceeds what you already paid to them, tell them to send you the invoice, and that Northwestern will send them a check for it in 2 weeks.
Communication Process

So you’ve planned your event – either on campus or off campus… so now how do you promote it?
eNews
Digital Signage
Kellogg Groups
Flyers
Club Email
Ways to Promote Your Event

• eNews – Keep it short and simple. Include date, time, location, link to register, and one or two sentences about the event.
  – Submissions must be received by noon on Tuesdays
  – Email submissions to Kerry.vanmalderghem@Kellogg.northwestern.edu
  – One time only

• Digital Signage – Use the templates from Marketing
  - Submissions can be received anytime
  - Promotion can last until your event is over
Ways to Promote Your Event – cont.

• Flyers – Email final draft to Kerry Van Malderghem for approval
  – Once approved, bring copies to 2M Office front desk to get stamped
  – Note: Cannot post in first floor bathrooms of Wieboldt

There are multiple ways to promote your events, both on campus and off campus, so use every vehicle in order to reach a large audience.
Driving Employer Engagement
How to work with the CMC to get employers exposed to Evening and Weekend students

Tino Chitiga, Assistant Director, Business Development, Career Management Center
Various Approaches to Engage Employers

- Treks
- Lunch & Learns (hosted at company sites)
- Breakfast with an employer (in the loop)
- Executive Speakers
- Virtual Career Fair
- Networking Nights
Recent & Upcoming Activities

• **TREKS**: We are happy to announce the launch of our new trek site!
  – Net Impact, Marketing (2), EVC

• **CMC Employer Events**:  
  – Boutique Consulting Networking Night (May, 10 2017 )  
  – Google Panel/Networking (June, 1, 2017)  
  – Facebook (TBD Summer)  
  – Executive Recruiter Event (June 29, 2017)

• **Other Activities**:  
  – **Industry Insight Series** (in partnership w KSA E&W)
CMC & Club Partnership

• Club employer target list
• How else can we engage with employers?
• Thought partners for employer related club events
• Publicize/ co-sponsor CMC events
Break

11:00-11:10 a.m.
Club Best Practices

Erin Landy, Outgoing Co-President of Marketing Club
Top 5 Tips of Being a Club Leader

1. Set expectations up front
2. Set a strategy for the year
3. Have live meetings
4. Send out club communications on a schedule
5. If you are interested, others are as well
Budget Process

Adam Gasior, VP of Finance & Marketing
Annual Budget Process

https://www.youtube.com/watch?v=mBS0OWGUidc
Source of Club Budget Funding

- Fiscal Year 2018: September 1, 2017 thru August 31, 2018

- Funding source: Student Activities fees (2/3)
  - Revenue is also generated through ticket sales

- “Roll-over” kept on reserve

- A full budget training will be held in June (TBD)
  - Do’s & Don’ts of spending $
  - In process of creating a one page “cheat sheet”
Annual Budget Process
(Phase 1 – June/July)

• Identify events that your club/committee would like to hold during the upcoming school year
  – use last year’s successful events as a benchmark

• Complete & submit the Budget Request Summary sheet
<table>
<thead>
<tr>
<th>Event Name</th>
<th>1st Half (Fall/Winter)</th>
<th>2nd Half (Spring/Summer)</th>
<th>KSA Funding Request</th>
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</thead>
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<tr>
<td>Event #1</td>
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<td>Event #15</td>
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</tr>
</tbody>
</table>

**Other Non-Event Operating Expenses:**

- Other Expenses

**TOTAL EXPENSES**

$ -

**Other Non-Event Revenue:** (DO NOT INCLUDE EVENT-SPECIFIC REVENUE INCLUDED ON EVENT WORKSHEETS)

- Corporate Donations
- Other

**TOTAL OTHER NON-EVENT REVENUE**

$ -

**TOTAL KSA BUDGET REQUEST**

(Total Expenses - Total Non-Event Revenue)

$ -
Annual Budget Process  
(Phase 2 – July/August)

- The Finance Committee evaluates budget requests
- Each club/committee will receive an email with the proposed allocation
- Any concerns or questions will be addressed during the Appeal Process (one week)
- After appeals, budgets are finalized for the year
Budgeting & Finance Resources

Event Planning

Contact: Clare Bukowski
Event Request Form
NOTE: Students planning events are expected to follow the event planning process outlined below. Please read carefully.

- Planning On-Site Events
- Planning Off-Site Events
- NEW! Promoting Your Events

Budgeting and Finance

Contact: Adam Gasior
- Budget Summary Form (.xls)
- Additional Budget Fund Request or Reallocation
- Budget Training Presentation
- Tax Exemption and Reimbursement Guidelines
- Statement of No Outside Accounts Form (.pdf)

Kellogg Groups

Contact: Courtney Williams
- KelloggGroups - How-To's/Club Tools
- KelloggGroups Policies
- For refunds from KelloggGroups payments, contact Courtney Williams.

Policy Documents

Contact: KSA President, Marissa Rose or Dean Krueger
- KSA Handbook (.pdf)
- KSA Constitution (.pdf)
Leveraging Kellogg Groups

Kerry Van Malderghem, Assistant Director, Student Life
What Kellogg Groups Does

• Delivers a Solid Club Experience
  – One integrated system
  – One calendar for student-facing events
  – Branded, consistent platform

• Works for
  - Prospective student
  - Current Students
  - Officers
Best Use of Kellogg Groups for Clubs

• Events
  – One calendar
  – Students – RSVP and it goes to your Outlook/iPhone
  – Officers – RSVP and Attendance for planning and tracking

• Communications
  – Website
  – Newsletter – standard way of communicating with members

• Member Management
Items Students/Clubs Don’t Use on Kellogg Groups

• Social Feed
• Home Page
• Directory
• Surveys
• Budget
• File Storage
Home Page

- (live page)
- Underused
- Facebook-style feed
Calendar

- (live page)
- Hover for more info
- Club and administrative events
- My Events
- Feeds digital signage
Club Signup

• For most students, a one-time signup
Club Management

- Manage members
- Communicate
- Manage events
- Surveys
Event Setup

- **Live Page**
- Easy to use
- Many Kellogg-customized features (eg dress code)
- Targeting, Display-to
- RSVP can be internal or external (EventBrite / Cvent)
Event Management Features

- Pre-event messaging
- Pre-event survey
- Different ticket types
- Waitlist
- Attendance tracking
- Post-event messaging
Event Attendance

- Can track with card-swipe
- Can track with phone
- Central attendance repository & reporting
Communications / Newsletter

- Send to members or subgroups
- Track opens
- Archive
Communications / Newsletter

- Send to members or subgroups
- Track opens
- Archive
Mobile

• Provides
  – Any Content!
  – Events
  – Social media feeds
Resources

• Direct Help
  – Kellogg “How to” website
  – Campus Groups help site
  – Email: support@campusgroups.com

• Learning More
  – New: Campus Groups blog / newsletter
Wrap-Up, Questions and Answers

Courtney Williams, Associate Director, Student Life
For Consideration

• How can you create meaningful events for the Kellogg community?
• What does success look like for your Club/KSA?
• How will you be a leader, influencer, and role model for the Kellogg community.
Questions?
Up Next: Lunch, KSA and Club Leader Forum
12:15-1:30 p.m.
Room 109