KSA and Student Leader Training

June 9, 2018
Wieboldt Hall

Northwestern | Kellogg
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.
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
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
Mission Driven Programming

• Define your club’s purpose
• Who is the club’s target audience?
• Define the club’s marquee events
• Define and measure success
• How do you ensure longevity?
Event Planning

Clare Bukowski
Event Coordinator
Planning On-Campus Events

• **Keys to Success**
  – Student Life Calendar
  – Event Request Form
  – Club Budget
On-Campus Event Request Process

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

• Event must be booked at least 2 weeks out
• Catering selection is due 2 weeks before event
• Final headcount is due 1 week before event
Planning Off-Campus Events

- Signed contract, Certificate of Insurance, alcohol rider, and event planning signature form necessary for ALL events
- At least 2 weeks to receive contract approval from NU Legal & Finance
- Documents must indicate Northwestern University as customer. Vendor must be paid with check from Northwestern, no other form of payment
- Students may NOT sign anything for the venue
Communication Tools

- eNews
- Campus Groups
- Digital Signage
- Club Email
- Flyers
Event Promotion & Communication

- **eNews**
  - Keep it short and simple
  - Include date, time, location, link to register, no more than two sentences about the event.
  - Submissions must be received by noon on Tuesdays
  - Email submissions to Kerry Van Malderghem
  - One time only

- **Digital Signage**
  - Use the NU branded templates from Marketing
  - Submissions can be received anytime
  - Promotion can last until your event is over
Event Promotion & Communication

• 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 1st 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.
Leveraging Campus Groups
What Campus Groups Does

• Delivers a solid club experience
  • One integrated system for all club dealings
  • Single calendar for student-facing events
  • Branded, consistent platform
  • All officers can access and edit events
Best Use of Kellogg Groups for Clubs

• Events
  • Pre and post event messaging
  • RSVP and attendance tracking – QR codes
  • Surveys
  • Various ticket types
  • Mobile enabled

• Communications
  • Website
  • Newsletter
  • File storage

• Member Management
Driving Employer Engagement

How to work with the CMC to get employers exposed to Evening/Weekend students

Tino Chitiga
tinotenda.chitiga@kellogg.northwestern.edu

Northwestern | Kellogg
Various Approaches to Engage Employers

- Treks -
- Lunch & Learns (hosted at company sites)
- Breakfast with an employer (in the loop)
- Alumni Spotlight Series
- Company Presentations
- Virtual Career Fair
- Networking Nights
Recent & Upcoming Activities

• **TREKS:**
  – Consulting Trek (6.29) and Marketing (7.27)

• **CMC Employer Events:**
  – July 18 - BCG
  – July 19 - Insight2Profit
  – July 26 - Accenture
  – Aug 2 - Bain
  – Aug 8 - Clorox
  – Aug 9 - Google
  – Aug 16 - KPMG
  – Aug 23 - ZS Assoc

• **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
Budget Process
Source of Club Budget Funding

• Fiscal Year 2018: September 1, 2018 thru August 31, 2019

• 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 on June 30
  • Do’s & Don’ts of spending
  • Quick tips 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
## 2017-2018 KSA Budget Request Summary

**Committee/Club:**

**Contact Name:**

**Contact Phone:**

### Event Allocations:

(Event Name, Quarter/Year, and Request are linked from each event tab)

<table>
<thead>
<tr>
<th>Event Name</th>
<th>1st Half (Fall/Winter)</th>
<th>2nd Half (Spring/Summer)</th>
<th>KSA Funding Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event #1:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #2:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #3:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #4:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #5:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #6:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #7:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #8:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #9:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #10:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #11:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #12:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #13:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #14:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>Event #15:</td>
<td></td>
<td></td>
<td>$ -</td>
</tr>
</tbody>
</table>

### Other Non-Event Operating Expenses:

<table>
<thead>
<tr>
<th>Other Expenses</th>
<th>$ -</th>
</tr>
</thead>
</table>

### 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

Club Officer 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
- Promoting Your Events
- NEW! Student Event Calendar

Budgeting and Finance

Contact: Garrett Hopper
- Budget Summary Form (Excel File)
- Additional Budget Fund Request or Reallocation
- Budget Training Presentation (PDF)
- 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, April Figueroa or Dean Krueger
- KSA Handbook (PDF)
- KSA Constitution (PDF)
Club Best Practices
Club Leader Best Practices

• Set expectations for your leadership up front
• Set a strategy for the year
• Meet in-person when possible
• Send club communications on a schedule
• Be engaged and involved, others will too
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?
Next Steps

• Join Slack (if you haven’t already)
• Start thinking about your events and budget
• Develop/refine club mission statement
• You will receive follow-up materials
  – Presentation slides
  – Event checklist
  – Leader planning workbook
  – Link to student event calendar

Don’t hesitate to reach out with questions!