

Northwestern | Kellogg

**Alumni Club and
Affinity Network Leaders
Playbook**

A Best Practices Guide to Establishing,
Growing and Sustaining Successful
Alumni Clubs and Affinity Networks

INTRODUCTION

The Kellogg alumni network is a powerful community of more than 60,000 Kellogg graduates working, leading and making a difference in every corner of the globe.

Kellogg's alumni clubs and affinity networks program seeks to foster a culture of lifelong engagement and build a community of alumni dedicated to helping one another succeed. With clubs located everywhere from Dallas to Shanghai, the program provides opportunities for alumni to network, engage in lifelong learning and advance their careers.

The clubs and affinity networks program includes:

- Regional clubs, identified by geographic areas where a significant number of alumni live and work
- Special Interest Groups (SIG), which are organized by specific industry- or affinity-based activities



At the heart of the clubs and affinity networks program is an engaged global network of alumni leaders who are committed to bringing alumni together and bringing the Kellogg brand and purpose to life in their communities.

This playbook brings together best practices from alumni clubs and affinity networks worldwide and provides the information and resources required to run a successful group.

The Kellogg Purpose

To educate, equip and inspire brave leaders who build strong organizations and wisely leverage the power of markets to create lasting value.

The World Will Know Us For:

- Our **grounded wisdom** that unites the power of analytics and people.
- Our **courageous and collaborative spirit** that embraces and mobilizes the power of the team.
- Our **pioneering vision** that challenges convention and inspires growth in people, organizations and markets.

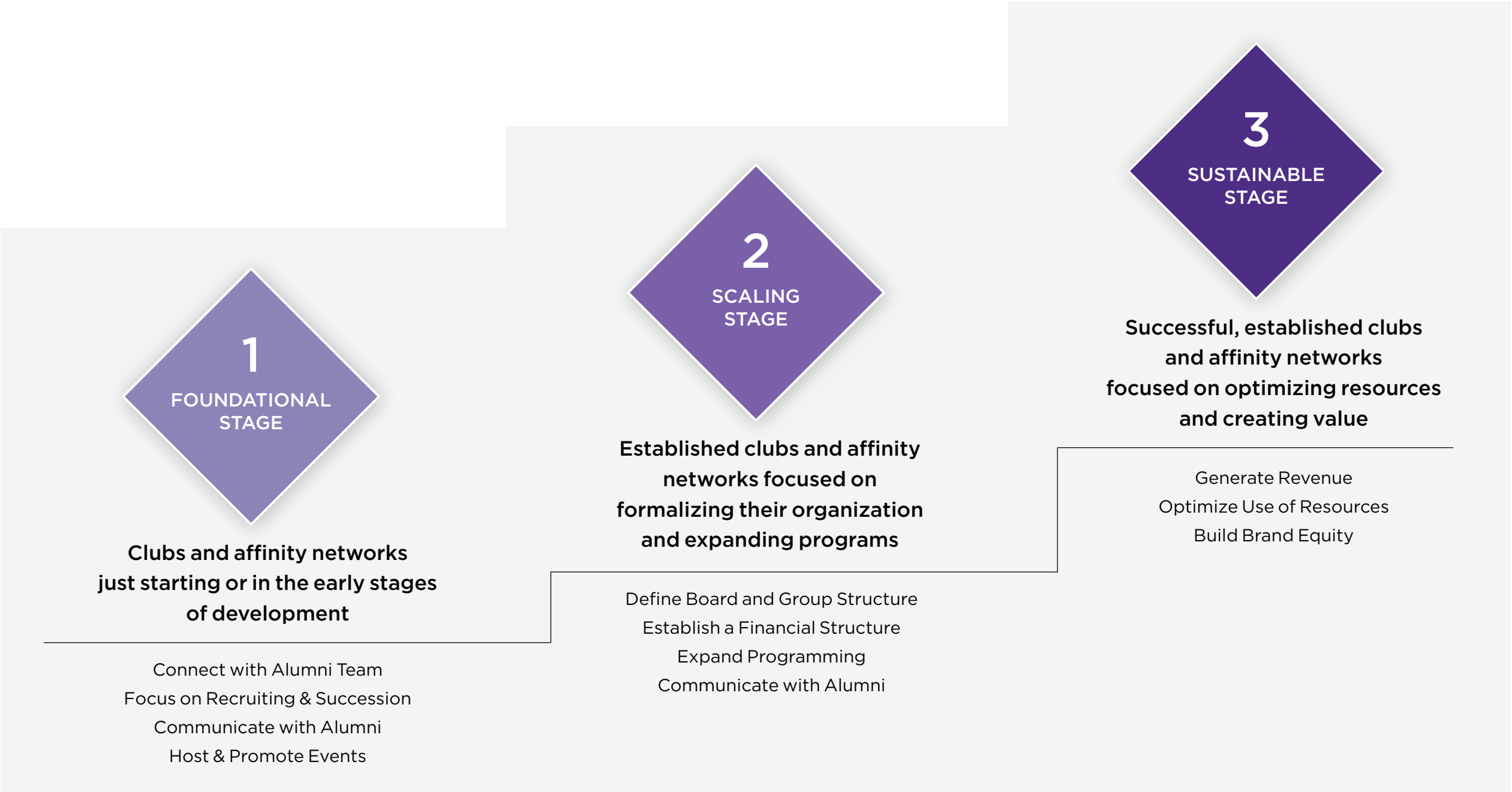
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*Each section of this playbook builds on the previous section. No matter where your club or affinity network falls within the spectrum, make sure it maintains at least a Foundational stage level of activity.

PROGRAM STAGES

Alumni clubs and affinity networks progress along a continuum, from new startups to large, well-established organizations. The questions and challenges you'll have as an alumni leader will change as your club or affinity network progresses from one stage to the next. That's why we've organized this playbook into three sections, each representing a different stage along the continuum. No matter what stage your club or affinity network is currently in, these resources will support your efforts and help you progress to the next stage.





The Alumni Clubs and Affinity Networks Team provides support to alumni leaders at any stage of club or affinity network development. You will be assigned to a team member based on your regional location. Here’s how to reach us.

U.S. West, South and Mexico	Gail O’Hara 847.491.3347 g-ohara@kellogg.northwestern.edu
U.S. Midwest, East and Canada	Gina Razum 847.467.2017 g-razum@kellogg.northwestern.edu
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FOUNDATIONAL STAGE

*Essential information for clubs and
affinity networks in “build” mode*

“As a former club leader, I think it is important for any club to build a sound platform and a strong relationship with key alumni leaders. The steps within this guide can be vital in positioning a club for long-term success.”

LOU MADGE '07

Kellogg Alumni Council Clubs Initiative Leader

FOUNDATIONAL

Whether you’re starting a new club or affinity network or building up one that’s in the early stages of development, the Kellogg Alumni Clubs and Affinity Networks Team is here to help. Here’s how to make sure your club or affinity network is meeting all the requirements for the Foundational level.



Quick Start Guide for the Foundational Stage

1

Connect with the Alumni Clubs and Affinity Networks Team

The first step in starting a new club or affinity network is to submit a request form.

2

Focus on Recruiting and Succession

Alumni clubs and affinity networks rely on strong volunteer leadership. To get started, you’ll need at least two additional leaders to help ensure that each leader’s workload is manageable and to foster the sharing of ideas.

3

Communicate with Alumni

Announce your new club or affinity network and invite alumni to participate by sending a mass email to all alumni in your area through iModules, Kellogg’s email marketing tool.

4

Host and Promote Events

Events provide a key opportunity for alumni clubs and affinity networks to recruit and engage alumni. Each event should be planned and promoted well in advance.

The Alumni Clubs and Affinity Networks Team offers valuable information and resources to clubs and affinity networks in the Foundational stage. Here's an overview.

Connections

The Alumni Clubs and Affinity Networks Team will put you in touch with alumni leaders who have gone through these steps and established successful clubs and affinity networks. For instance:

- Kellogg Alumni Council (KAC) club partners
- Pete Henderson Society (PHS) members
- Current and former club and affinity network leaders

Data Resources

The Alumni Clubs and Affinity Networks Team will provide you with resources and data* to give you a full picture of your market, including:

- Total number of alumni
- Breakdown by class year, program, geographic location and industry
- Engagement by segment

*Before you can access any Kellogg data, you'll need to sign the **Data Confidentiality Agreement**



Download the
**Data Confidentiality
Agreement**

Digital Tools

- A dedicated web page
- Kellogg-branded email templates for communications
- Online event registration tool
- Training on how to use these resources

Detailed Guidelines on Building a Foundational Club or Affinity Network

STEP 1 / CONNECT WITH THE ALUMNI CLUBS AND AFFINITY NETWORKS TEAM

The first step in starting a new club or affinity network is to submit the request form to the Alumni Clubs and Affinity Networks Team. We'll contact you within two weeks to discuss whether you should proceed on a pilot basis, as a new club or affinity network or as a subset of an existing group in the same geography.

This screening process helps ensure that new clubs and affinity networks have the support and infrastructure they need for long-term sustainability.



Download the
request form

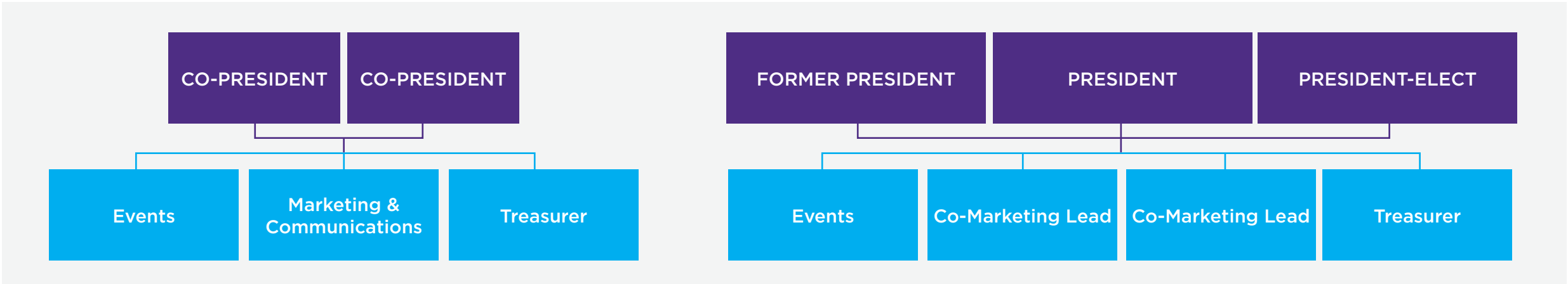
STEP 2 / FOCUS ON RECRUITING AND SUCCESSION

The most critical factor in establishing a sustainable alumni club or affinity network is identifying and engaging a committed, enthusiastic leadership team. Recruiting leaders and developing a plan for succession should be a high priority for all clubs and affinity networks at every stage of development.

Recruiting

Foundational clubs and affinity networks should enlist two to four members in addition to the president(s). Your team members can serve in a variety of roles, including co-president, treasurer and secretary.

Sample Organizational Charts



Recruiting Strategies

- Tap into your network of Kellogg alumni.
- Send out a community-wide email calling for volunteers through iModules.
- Incorporate a recruiting pitch in all communications.
- Connect with Kellogg volunteer leadership.
- Engage in intentional recruiting at club events.
- Develop an annual recruiting plan.
- Welcome new graduates every year.
- Get in touch with other clubs to learn how they are operating.

Talk to your Alumni Clubs and Affinity Networks team liaison for more recruiting techniques.

Succession Planning

Kellogg alumni leaders usually serve terms of one or two years. What's more, your leaders' circumstances could change at any time. That's why succession planning is a critical component of every volunteer recruitment plan.

- Searching for your replacement should be the first and last job of every club and affinity network leader or board member. Once you accept a position, you should begin thinking about who will succeed you.
- Succession planning must occur on an ongoing basis.
- Appoint others to leadership roles — no matter how small. Giving others a sense of responsibility or ownership over an event links them to the group and will help you in identifying future leaders.
- Use a file-sharing mechanism to store and share documents and maintain the history of your club or affinity network. Tools like Slack or Google Drive provide shared access to important documents, making leadership transitions more seamless. Your club can also use NU Box for file sharing in a more secure environment.



View a [sample recruiting email](#)

“Making sure that you and your board have qualified successors is the single most important piece of succession planning. Maintaining continuity of engagement with your community will strengthen satisfaction with Kellogg and the club.”

MARIA RUSSO-DERCHI '12
President, Kellogg Alumni
Club of South Florida

STEP 3 / COMMUNICATE WITH ALUMNI

A successful club or affinity network relies on strong, effective communication with target audiences. Here's an overview of best practices and how Kellogg can help.

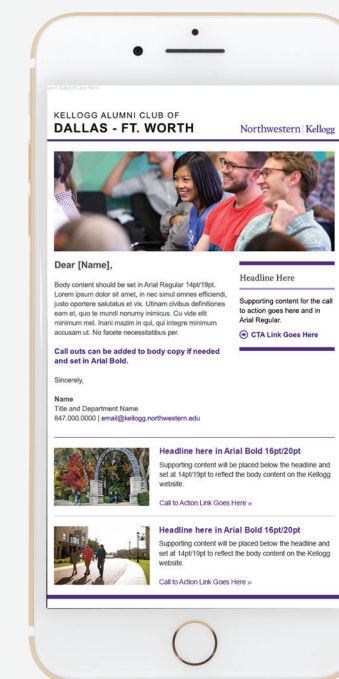
- **Club and affinity network web pages.** Every alumni club and affinity network has a dedicated web page on Kellogg's Alumni Relations website. Once per quarter, we ask that you follow up with the Alumni Clubs and Affinity Networks Team about any changes to leadership or social media to ensure your page stays up to date.
- **Emails.** Most of your communication with your alumni should be via email through iModules, Kellogg's alumni connection tool. The Alumni Clubs and Affinity Networks Team will provide email templates and training to get you started, and then you'll have the capacity to plan, create and send email communications to your alumni base.
- **Brand assets.** We'll provide you with Kellogg brand assets, including logos, branding guidelines and templates to make sure your communications reflect and reinforce the Kellogg brand.
- **Social media.** Take advantage of Facebook, Twitter and other social media platforms, especially when promoting upcoming events.



Download
brand assets



Learn more about
communications
best practices





STEP 4 / HOST AND PROMOTE EVENTS

Events provide a key opportunity for alumni clubs and affinity networks to recruit and engage alumni. Partnering with an MBA peer club, an NU Club, MBA Consortium or a local business club is a great way to collaborate and share best practices.

Event Planning

Establish a calendar of events on an annual basis. We recommend that you coordinate your event schedule with the Alumni Clubs and Affinity Networks Team.

Events should be planned and promoted well in advance. Most events require at least three months of planning from start to finish.

Sample Planning Calendar for a November 1 Event

DATE	ACTIVITY
August 1	Schedule event and assign leadership team
September 1	Pre-event marketing
October 1	Send out event reminders and final call
November 1	Event

Event Calendar

Clubs in Foundational mode should aim to host up to four events per year, distributing them roughly one per quarter. Work with your Alumni Clubs and Affinity Networks Team to determine the best calendar of activities for your club.

Sample Event Calendar

TIME OF YEAR	EVENT
October	Welcome event for new grads
February	Career workshop
May	Speaker or content-based event
July	Networking event for Kellogg interns

Types of Events

Foundational clubs and affinity networks should keep programming general to attract a wide audience.

For example:

- Networking events
- Career events
- An annual welcome event for new graduates
- An annual reception for summer interns

Typical Event Venues

- Corporate conference rooms
- Reciprocal clubs (e.g., local University Club, peer MBA school facilities)
- Restaurants, clubs, bars or lounges with private event space
- Alumnus/a home or business

Tips on Selecting a Venue

Start your venue search by tapping into your network—club leadership, your alumni base, and KAC and PHS members—for access to corporate venues or similar assets. You might also be able to negotiate free space with local companies by opening the event to a company's employees and/or recruiters.

Event Promotion

Kellogg offers resources to help you market your events to a wide audience. Here are some strategies for successful event promotion:

- Promote events on the Kellogg Eventbrite page.
- Establish an online registration mechanism through Eventbrite, Kellogg’s preferred online platform.
- Use iModules to invite alumni to your event through a series of emails.
- Use social media to promote events and spark conversations with your alumni base.
- Send a post-event thank you and survey. As part of your survey, please include a Net Promoter Score (NPS) to help you and the Alumni Clubs and Affinity Networks Team better understand what most drives engagement.



Download a
sample survey
with NPS



Download our
event-planning
checklist

Sample Email Calendar for an Event on November 1

SEND	SUBJECT
September 1	Save the date
October 1	Detailed invitation
October 18	Reminder
November 2	Thank you with survey
November 17	Send registration and survey data to the Alumni Clubs and Affinity Networks Team

Metrics

The Alumni Clubs and Affinity Networks Team collects key metrics as part of an ongoing measure of the health of our alumni community and to build an understanding of the profile of community connections over a lifetime.

We measure reach by the number and percentage of unique alumni making connections over a 12-month period. The health of this activity and the network in general is currently measured by NPS (Net Promoter Score) of each event or connection. In the longer term, it will be measured by the frequency of connection behavior that matches with our desired Kellogg alumni culture.

Collecting this data consistently over time will enable Kellogg to provide clubs and affinity networks with historical activity, comparisons to other markets and clubs, and targeted “best practices” that have a higher probability of success in any one market.

Kellogg will also use this aggregate data to better understand alumni needs by segment, by life stage and by career stage. Kellogg will annually update alumni leaders on its progress toward these goals.

Data we’d like to receive from all clubs and affinity networks

DATA	WHEN TO REPORT
Registration / attendance lists for all events	Within one week of event
NPS scores for events	Within two weeks of event
Other connections you are aware of, including alum to alum, alum to faculty, alum to student	As possible
OTHER	WHEN TO REPORT
Financial health, including signers on bank account and current state of reserves	Annually
Calendar of events	Beginning of club or affinity network fiscal year
Changes to board	Within one week
Board meeting notes	As possible

Ongoing reporting from AR

Kellogg’s Alumni Relations Team will provide you with annual market analysis reports and activity reports showing trends and comparisons to other markets and Kellogg as a whole.



SCALING STAGE

*Information for clubs and affinity networks
that are focused on expanding their board,
programming and outreach*

“Our approach to scaling the club in 2017 has been grounded in the recognition of the club’s primary role as the anchor for a strong Kellogg alumni community. This led us to build a plan that aligned with Kellogg’s strategic initiatives with an emphasis on nurturing repeated connections with alumni.”

RIZ VAZIR '14

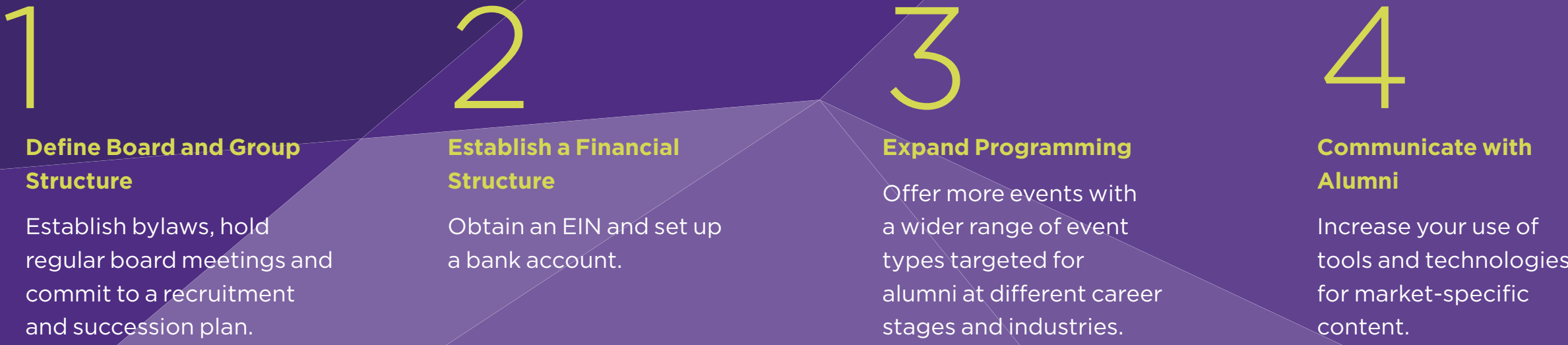
President, Kellogg Alumni Club of Seattle

At the Scaling stage, your focus should be on positioning your club or affinity network as the first point of connection for alumni to engage with the Kellogg community. Offer a variety of programming and recognize that alumni in different industries and different career stages will be drawn to different events.

Your Alumni Clubs and Affinity Networks Team representative will work with you to review your current organizational structure and programming. The team will provide you with data about the alumni in your market and also connect you with other alumni who can serve as resources.



Quick Start Guide for the Scaling Stage



Detailed Guidelines for Running a Club or Affinity Network at the Scaling Stage

STEP 1 / DEFINE BOARD AND GROUP STRUCTURE

Establish Bylaws

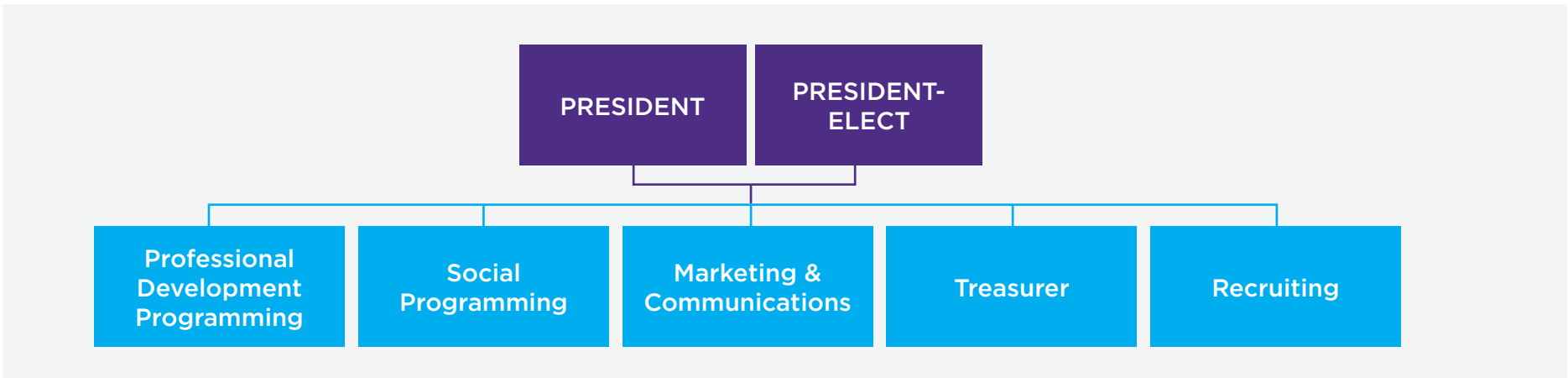
Your club or affinity network will benefit from the establishment of sound bylaws that articulate your group’s purpose, define leadership roles and responsibilities, and outline policies and procedures.

Establish Meeting Schedule and Board Structure

As your club or affinity network grows, it becomes increasingly important to establish a regular calendar of meetings for your board. Ideally, the board should hold a minimum of four to six meetings per year, including one planning meeting and one that’s open to all alumni in the region or industry/affinity.

We also encourage you to formalize your group’s leadership roles and define specific responsibilities. Either identify successors or have co-leads for as many things as possible to ensure club or affinity network activity is not affected by a volunteer needing to step away from leadership. Here’s an example:

Sample Organizational Chart for Scaling Stage



New for clubs and affinity networks at the Scaling stage:

- Formalize Organization
- Establish Financial Structure
- Expand Event Programming
- Target Communications



Download a sample set of **club and affinity network bylaws**



Learn more about the **roles and responsibilities** of your leadership team

Prioritize Recruiting & Succession

Establishing and maintaining a dedicated team of enthusiastic volunteer leaders is vital to the long-term success of your club. Here are some things to consider as you grow your leadership team.

Recruiting

Larger clubs and affinity networks require larger leadership teams. Your team members can serve in a variety of roles at the Scaling stage, including co-president, treasurer and secretary.

Here are some strategies for expanding your recruitment efforts:

- Review your annual recruitment plan.
- Continue to incorporate recruiting pitches in all communications.
- Continue to engage in intentional recruiting at events.
- Create an annual cycle for connecting with new graduates and interns.

Succession Planning

At this stage, we encourage you to consider creating “shadow” roles for your incoming leaders. Several months before a leader steps down, the incoming candidate can work alongside the previous leader in fulfilling the duties of the role — thus gaining experience and perspective before officially taking on the role.

Recruiting and succession planning at the Scaling level involves:

- More sophisticated recruiting techniques
- An annual review of your recruitment plan
- Intentional recruiting at events
- “Shadow” roles for incoming leadership



[View a sample recruiting email](#)

STEP 2: ESTABLISH A FINANCIAL STRUCTURE

Clubs and affinity networks at the Scaling stage will need to pay bills and make deposits. Since you have financial obligations at this stage, it's important to have checks and balances on your financial matters. Here's what you need to do.

- Obtain an EIN (Employer Identification Number) at irs.gov.
- Open a bank account for your club or affinity network
- Make sure your bank account has two signatories, and identify those signatories to the Alumni Clubs and Affinity Networks Team.
- Review your reserve balance regularly.
- Expand your leadership team to include the role of treasurer. Submit copies of all financial documentation to your Alumni Clubs and Affinity Networks Team liaison.

Note: These directions apply to clubs and affinity networks in the United States. International groups should work with the Alumni Clubs and Affinity Networks Team to create and/or obtain needed documentation.

STEP 3: EXPAND EVENT PROGRAMMING

Larger clubs and affinity networks can present more and larger events than at the Foundational level.

For clubs and affinity networks at the Scaling stage, we recommend hosting one to two events each quarter, including one annual marquee event.

As your group grows you'll be able to host events that are targeted to alumni at different career stages or industries. For example, you might host a networking event for alumni in banking, or a panel discussion on entrepreneurship for budding entrepreneurs.

Scaling clubs and affinity networks should continue to host the same types of events they hosted as Foundational groups:

- Networking
- Career events
- Events for new graduates
- Events for summer interns

Financial needs at the Scaling level include:

- An EIN
- A bank account
- A treasurer on the leadership team



View [Setting Up a Bank Account](#) for details

In Scaling, you can expand your programming with:

- More events
- A wider range of event types, including annual marquee-style events
- Targeted activities for alumni at different career stages and in different industries

In addition, Scaling clubs and affinity networks have the capacity to present three new categories of events:

- Targeted events by industry
- Lifelong learning events
- Annual marquee events

Sample Event Calendar for the Scaling Stage

TIME OF YEAR	EVENT	TYPE	MAIN TARGET
September	Welcome event for new graduates	Networking	All
November	Kellogg alumni speaker or panel event	Lifelong learning	All
January	Career event	Career	Mid-career
March	Happy hour	Networking	Recent grads
April	Professor event	Lifelong learning	All
June	Executive marquee event/panel	Lifelong learning	Senior

Speakers and Venues

For an event at the Scaling stage:

- Establish a budget for each event
- Consider catering
- Investigate hotel event spaces for your larger events
- Connect with the Alumni Clubs and Affinity Networks Team for help identifying speakers



Download our
budget worksheet
for details

Event Promotion

At the Scaling stage, you might consider charging a fee to attend your events. Kellogg encourages alumni clubs and affinity networks to develop strategies and build pricing models to cover event costs.

Promoting your events at the Scaling stage will rely on most of the same techniques you used at the Foundational stage, but at a more sophisticated level.



Download our
event-planning
checklist

Sample Email Calendar for an Event on November 1

SEND	SUBJECT
September 1	Save the date
October 1	Detailed invitation
October 18	Reminder
November 1	Event
November 2	Thank you with survey
November 17	Send registration and survey data to the Alumni Clubs and Affinity Networks Team

Metrics

It is essential to monitor your group’s performance against your goals by collecting data on alumni engagement with events and with your club or affinity network in general. For details about metrics, please see the **Foundational section** of this playbook.

Typical event venues for Scaling clubs and affinity networks include:

- Corporate conference rooms
- Reciprocal clubs (e.g., University Club, Princeton Club
- Hotel conference space

“We now have a clear measurement of what success looks like in 2017. Beyond planning for a larger number of events this year, we are specifically focusing on how many alumni we are able to reach, and how many of those alumni frequently engage with the club. This clarity helps us stay on course rather than chasing after events in an ad-hoc fashion.”

RIZ VAZIR '14
President, Kellogg Alumni Club of Seattle

STEP 4: COMMUNICATE WITH YOUR ALUMNI

At the Scaling level, your communications with alumni should become more sophisticated and more targeted. We encourage you to explore tools and technologies that facilitate alumni engagement and event registration, such as inviting members to serve as club or affinity network ambassadors on social media.

Communication Tips at Scaling Level

- Consider monthly email newsletters
- Expand your use of social media



SUSTAINABLE STAGE

Information for successful, established clubs and affinity networks focused on sustaining their momentum

“Key strategies for sustaining a strong club include creating a structured, highly engaged board; having a succession plan; designing events and activities around different life stage alumni needs; and hosting annual signature events to extend the brand influence. Building a brand that is highly relevant to our local alumni (and the local business world) is vital to our continued success.”

HOLLY DUNCAN '05
President, Kellogg Alumni Club of
Dallas / Fort Worth

Thriving clubs and affinity networks that have been in operation for a sustained period of time with robust events and a solid leadership team are at the Sustainable stage.

Clubs and affinity networks at the Sustainable end of the spectrum strive to be the first place alumni members go when they want to make connections with the Kellogg community. Groups at this stage look for opportunities to spark alumni connections, interactions and engagements to help each other succeed, beyond attendance at events. They are able to tap into their network of past leaders to show that support of the club or affinity network extends to all career stages and industries in the market.

Sustainable clubs and affinity networks should be focused on creating organizational momentum and stability to sustain the group beyond the loss of any leader. Actively recruiting alumni leaders from various career stages and industries can help with these targeting efforts.

Clubs and affinity networks in Sustainable mode should have everything that is required for a fully functional nonprofit entity. Your Alumni Clubs and Affinity Networks Team will connect you with peers in different markets at this stage to share and learn from one another’s experiences.



Quick Start Guide for the Sustainable Stage

1

Generate Revenue

Potential sources of revenue include annual events, membership dues and sponsorships.

2

Optimize Use of Resources

Obtain nonprofit status, acquire liability insurance and create clear guidelines.

3

Build Brand Equity

Target your communications, expand your programming and promote events on a more sophisticated level.

Detailed Guidelines for Operating a Sustainable Club or Affinity Network

STEP 1: GENERATE REVENUE

Clubs and affinity networks can generate revenue in several ways, the most common of which is hosting events.

- Plan annual events that will generate revenue for your club or affinity network. These can be lectures, faculty events or marquee events that have been successful for you in the past.
- Use a budget template to make sure your expected revenue stream is healthy once all event expenses have been taken into account.
- Price the event attractively for your alumni market.
- Explore corporate sponsorship opportunities for your most expensive events. Before contacting any potential sponsors, please check in with your Alumni Clubs and Affinity Networks Team liaison to ensure a strategic approach.
- Evaluate the collection of membership dues.

STEP 2: OPTIMIZE USE OF RESOURCES

Obtain Nonprofit Status and File for Federal and State Tax Exemption

Obtaining nonprofit status can help you lower expenses and provide access to other revenue options. Official Kellogg alumni clubs and affinity networks in the U.S. qualify for IRS 501c3/7 independent, nonprofit status provided they comply with IRS regulations.

Before you can incorporate your club or affinity network as a nonprofit, you must have a financial structure in place, as outlined in the Scaling section of this playbook:

- Adopt bylaws that establish the group's nonprofit purpose
- Establish an EIN (Employer Identification Number) for the club or affinity network through the IRS
- Create a checking account with the group's own EIN

“Our ability to sustain the club is attributed to a formal recruiting and succession plan in addition to well-documented processes and templates. A mixture of incumbent and new board members allows for both seamless transitions and innovation.”

KERRI LIN '11
Immediate Past President,
Kellogg Alumni Club of Chicago



Download
**How to Incorporate
as a Nonprofit**



Measure Your Own Metrics

The platform for a successful club or affinity network is the ability to collect and analyze key data. For details on data to collect, [see the Foundational section of this playbook](#).

Build Clear Guidelines and Operating Principles

As your club or affinity network grows and hosts more activities and events, it becomes increasingly important to build your board, establish a regular calendar of meetings and manage your volunteers in a deliberate, effective way.

Hold Regular Board Meetings

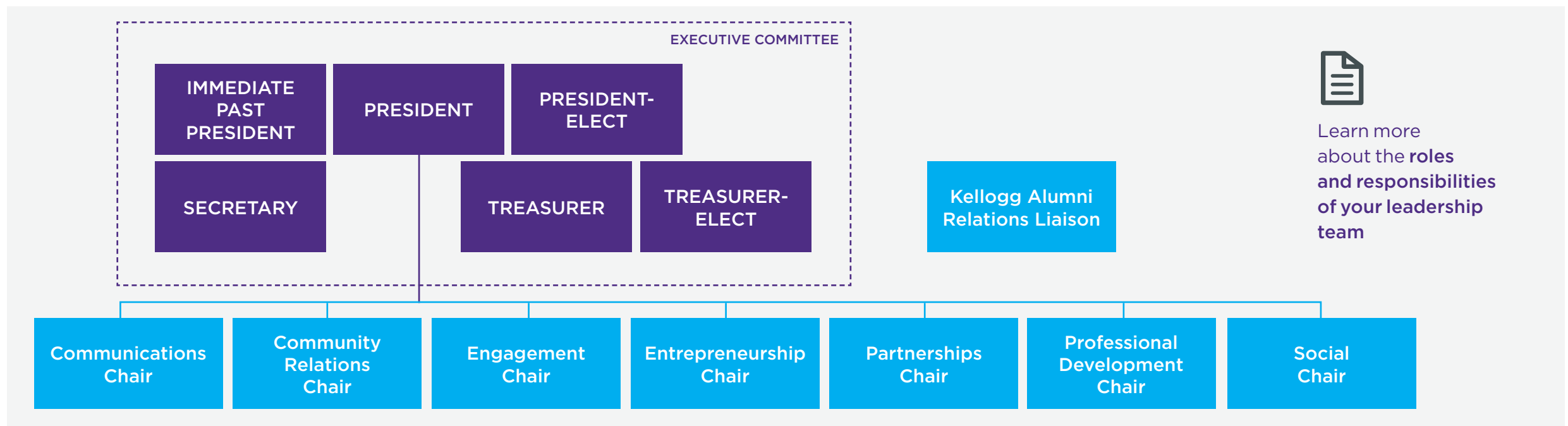
At this stage, the board should hold monthly or bimonthly board meetings. These should include an annual planning meeting and an annual meeting open to all alumni in the region or industry/affinity to help drive engagement.

Build Your Board

Clubs and affinity networks at the Sustainable level should have a well-established board structure and formalized leadership roles. If your group has experienced significant growth, consider holding elections to assemble your board. The Alumni Clubs and Affinity Networks Team can help you determine whether this is the right step for your club or affinity network.

Formalized elections are guided by your group's bylaws ([view sample bylaws](#)). In addition to holding elections, you should determine a timeline for newly elected board members to shadow outgoing leadership to ensure a smooth transition.

Sample Structure for a Sustainable Board



Manage Volunteers

Strong leadership is essential to the success of any club or affinity network. Here are some strategies and best practices to make sure your alumni leaders are equipped to do their best work.

Onboarding new directors

When alumni leaders join your leadership team, it's crucial to provide them with the tools they need to succeed — and to make sure they understand their roles, how the club or affinity network works and what is expected of them. At a minimum, you should provide the following to new leaders:

- Financial Information, including revenue, expenses, budget
- Club or affinity network bylaws
- Event-planning processes and templates
- Contact info for other board members
- Overview of board member roles and responsibilities and how board members interact with Kellogg staff
- Connections with other board members

Volunteer management at the Sustainable stage includes:

- Onboarding new directors
- Training
- Recognition



Training

Educate incoming leaders about the practices of your club or affinity network and of Kellogg as a whole. Make sure that your president-elect is onboarded in enough time to shadow the president through critical cycles of your operating year. At this stage you can also start a shadowing program to prepare incoming leaders for officer positions besides president.

For basic training modules, see an online resource such as Board Source.

Recognition

Acknowledging and thanking your volunteers is an important part of volunteer stewardship. Build recognition opportunities into your communication strategies, and acknowledge volunteers through social media posts or email or at events. Every opportunity to recognize your volunteers pays off in increased loyalty and dedication.

STEP 3: BUILD BRAND EQUITY

By this stage, your club or affinity network should have an established reputation among alumni. Ideally, alumni in your market will see your group as their go-to source for events, networking opportunities and career resources.

Communicate with Your Alumni

At the Sustainable stage, your communications with alumni should become more sophisticated and more targeted. By now, you should have sub-committees or affinity-based groups that target specific segments of the total club and affinity network alumni population.

We encourage you to explore tools and technologies that facilitate alumni engagement and event registration, and to continue to maximize your use of these basic communication tools:

- Kellogg's Eventbrite page
- Email campaigns
- Brand assets
- Social media



Expand Event Programming

An extensive calendar of dynamic events will help you position your club or affinity network and build your brand. At this stage, we recommend hosting two to three events each quarter, or eight to 12 events a year, including an annual marquee event. Your Alumni Clubs and Affinity Networks Team liaison can recommend the best calendar of activities for your group.

We also encourage you to consider partnering with like-minded organizations to host larger events. Working with corporations, other schools or other clubs is a good way to share the workload and expand your reach. Be sure to take ownership of any event that your club or affinity network takes the lead on, and make your ownership clear to your audience.

Types of Events

Clubs and affinity networks in the Sustainable stage of development have the capacity to present targeted programming for alumni at different points in their careers and in different industries. A late-career CEO might not be interested in a bar event for young alumni, for instance, but might attend a lunch with other alumni CEOs or host an industry-specific event.

Sustainable clubs and affinity networks should continue to host the same types of events they hosted at the Scaling stage:

- Networking
- Career events
- Events for new graduates
- Events for summer interns
- Lifelong learning
- Marquee

In addition, at this level you might consider hosting live-streaming events or events that take advantage of telepresence to hear from faculty members or other thought leaders in remote locations.

Sustainable clubs and affinity networks can expand their programming with:

- More events
- A wider range of event types
- Targeted activities
- Partnering with other organizations to present larger events



Sample Event Calendar for the Sustainable Stage

TIME OF YEAR	EVENT	TYPE	MAIN TARGET
September	Welcome event for new graduates	Networking	All
October	Kellogg alumni speaker or panel event	Lifelong learning	All
November	Executive event / panel	Lifelong learning	Senior
January	Career event	Career	Mid-career
March	Happy hour	Networking	Recent grads
April	Professor event	Lifelong learning	All
May	Full-day conference with thought leader	Lifelong learning	All
June	Industry event	Career	Senior

Typical event venues for clubs and affinity networks at this stage include:

- Corporate conference rooms
- Reciprocal clubs (e.g., University Club, Princeton Club)
- Hotel conference space

Speakers and Venues

At this stage, your club or affinity network should be capable of delivering large, sophisticated events that generate profits. As you plan your events, make sure the venue and budget are in line with your goals and your profit margins.

Consider forming partnerships with a corporation or another university to help you present expanded events. A partnership can lead to cost savings, better venues and the synergy of collaboration.



Event Promotion

By the time you achieve Sustainable status, you will probably charge admission to most of your events. Kellogg encourages alumni clubs and affinity networks to maximize the opportunity to generate revenue by developing strategies and building pricing models to cover event costs.

Promoting your events at the Sustainable stage will rely on most of the same techniques you used at the Foundational and Scaling stages, but at a more sophisticated and intentional level. Promotional tools include:

- Kellogg’s Eventbrite page
- An online registration and payment mechanism
- Email campaigns using iModules
- Social media
- Post-event thank you and survey
- Other regional clubs, such as a Northwestern University club or another MBA club

In addition to post-event surveys, we encourage all clubs and affinity networks to survey members on an annual basis about programming in general. As you develop your survey, make sure to include a Net Promoter Score (NPS) question to contribute to the Alumni Clubs and Affinity Networks Team’s understanding of the factors driving event engagement.

Sample Email Calendar for an Event on November 1

SEND	SUBJECT
September 1	Save the date
October 1	Detailed invitation
October 18	Reminder
November 1	Event
November 2	Thank you with survey
November 17	Send registration and survey data to the Alumni Clubs and Affinity Networks Team



Download our event-planning checklist

CONCLUSION

Kellogg alumni clubs and affinity networks play an important role in engaging the alumni community with Kellogg and fostering personal and professional connections among our alumni. Through events, networking opportunities and more, alumni leaders serve a vital function in strengthening Kellogg's brand and bringing to life our purpose of educating, equipping and inspiring brave leaders.

As a club or affinity network leader, you are a vital member of our team — and we're committed to supporting your journey every step of way.

Office of Alumni Relations / Advancement Data Confidentiality Policy & Terms of Use Agreement

The Office of Alumni Relations at the Kellogg School of Management at Northwestern University provides a suite of online services to Kellogg School alumni, including critical information such as alumni contact and biographical data. As a representative of the alumni from the Kellogg School of Management, you agree to operate with the highest level of integrity when dealing with the private information of the Kellogg School of Management alumni. Use of **Our Northwestern**, and its contents indicates acknowledgement of an agreement to these terms of use, and prior to your first use of this **Our Northwestern**, kindly sign and return to Kellogg this written acknowledgement and agreement.

Information in Our Northwestern and ancillary systems is the exclusive property of the Kellogg School of Management and Northwestern University. Users of Our Northwestern and ancillary systems are reminded that personal information of Kellogg alumni accessible through Our Northwestern may be used only in furtherance of approved Kellogg Alumni activities. These services may not be used for personal, political, religious, or commercial purposes. Likewise, no personal information of our alumni will be provided to third parties without permission by the Kellogg School and consent of the affected alumni.

Users of the Our Northwestern and ancillary systems are entirely responsible for all content that they post to Our Northwestern or ancillary systems and all uses they make of information retrieved from the system. By submitting a request for data, or by retrieving data directly from the system, the user accepts responsibility for his/her use of that data. If the request is made on behalf of a Kellogg Alumni volunteer, the user is responsible for determining the volunteer's intended use and obtaining the volunteer's written agreement to abide by this policy. Alumni personal data may be used only for its original intended purpose and may not be reused or reassigned for additional uses.

The Kellogg School of Management at Northwestern University reserves the right to revoke access of, and to pursue legal action against, any individual who misuses these services.

I have read and understand the Kellogg School of Management's Data Confidentiality Policy and Terms of Use and agree to abide by it.

Print Name

Signature

Date

Preliminary Request to Form a Kellogg Alumni Club or Network

In order to ensure that new clubs have the support and infrastructure needed for long-term sustainability, we ask that you complete the following form.

STEP I / YOUR INFORMATION

Name:

Email:

STEP II / DEFINE THE CLUB/NETWORK

1. Name of Club/Network that you want to create:
2. Describe your objective for creating this Club/Network (no more than 100 words):
3. Share how you plan to build this alumni club/network:
4. If there are alumni other than yourself who will help you create the Club/Network, please list their names here:

STEP III / KELLOGG REVIEW

Please submit this form to the **Alumni Clubs and Affinity Network Team**. The request will be reviewed and applicants contacted within two weeks to discuss whether it is best to proceed on a pilot basis, as a new club or as a subset of an existing club in the same geography.

Thank you!

Sample Email Pitch

The Kellogg Alumni Club of Boston is looking for new Board members for the 2016-2017 year, and we want you to join us!

You should apply for a role if:

- You've enjoyed attending one of our events;
- You have an idea for an event you'd like to plan;
- You want to build your network among Kellogg alumni;
- You're willing to volunteer a few hours a month to Club work.

What if you can't commit on an ongoing basis, but you'd still like to be involved? Let us know by filling out **this form**.

To apply for a position on our Board:

1. Fill out **this form** no later than [insert date].
2. The Nominating Committee will conduct interviews by [insert names].
3. Terms will formally begin on [insert date].

Questions? Please contact [insert name & contact info].

When building and sending emails from Kellogg alumni club or affinity network GIDs, be sure to use the most up-to-date branding and style guidelines, and to test each email thoroughly before deploying.

Email communications best practices:

- Look at past email metrics to determine which send-times are the most effective for your market
- Do not send emails during major holidays or other conflicting events
- Send emails in a regular cadence (e.g., a newsletter once a month, or promotional emails X number of days before an event)
- Test each email thoroughly (see below)

Test each email for the below criteria before sending:

- Are both the subject-line and from-lines logical and professional?
- Is the subject-line under 50 characters and/or does it include a call to action?
- Are there any spelling or grammar errors in subject or body text?
- Are all dates correct?
- Are the alumni or faculty designations accurate?
- Are the images, including the header image, correctly named using alt text?
- Are there any spacing issues, inconsistencies with font/sizing, color issues or formatting problems?
- Are all links active, and do they direct recipients to the correct pages?
- Is there an unsubscribe link at the bottom of the email?
- Is the email formatted correctly on mobile devices?

Kellogg branding guidelines:

- Georgia font for headers and Arial for body content
- Font size 16 for body content and as appropriate for headers
- Bolded purple text for links (hex color: 4F2582) and minimized use of purple text otherwise
- When applicable, use tokens to personalize emails (i.e. first name salutation “Dear ##First Name##”)
- Use most up-to-date Kellogg logo

Sample Survey with Net Promoter Score Question

As part of your survey, please include an NPS question to help you and the Alumni Clubs and Affinity Networks Team better understand what most drives engagement. Set up an account with an online survey platform such as Survey Monkey or Qualtrics to collect and store event feedback.

1. Based on your experience at this event, how likely are you to recommend a similar Kellogg Alumni Club of Boston event to another alumnus/a? (0 = Would NOT recommend / 10 = Would STRONGLY recommend)

☐ 0

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

☐ 6

☐ 7

☐ 8

☐ 9

☐ 10

2. Please help us understand why you selected the answer above.

3. How satisfied were you with this event?

☐ Exceeded my expectations

☐ Met my expectations

☐ Did not meet my expectations

4. Is there anything else you'd like to share with us?

5. A Club Officer may want to get in touch to learn more about your experience. If you wouldn't mind a call or an email, please enter your contact information below:

Name

Email address

Phone number

Done

Event Planning Checklist

Four to Six Months Before Event

TASKS	BEST PRACTICES
<input type="checkbox"/> Determine event purpose and target audience	
<input type="checkbox"/> Search club board calendar to identify potential dates for event	Check for conflicts such as other club events, Kellogg events, religious holidays
<input type="checkbox"/> Identify potential venues and/or sponsors	Reach out to contacts for event sponsorship opportunities (e.g., donate cost of venue)

Two to Three Months Before Event

TASKS	BEST PRACTICES
<input type="checkbox"/> Finalize date of event and post event to club calendar	
<input type="checkbox"/> Identify and onboard any additional committee member to assist with event planning	Event Owner should have at least one additional committee member to assist with event planning activities for events with >75 attendees
<input type="checkbox"/> Confirm availability of speakers, panelists, hosts and sponsors	
<input type="checkbox"/> Gather proposed costs/invoices for event costs (e.g., venue, catering)	Confirm that costs are fully loaded (include applicable taxes and gratuities)
<input type="checkbox"/> Complete Budget Form and Communication Form	
<input type="checkbox"/> Email DRAFT Budget Form and supporting draft contracts to treasurer for approval and voting necessity	Treasurer will work with event owner directly to resolve questions, then communicate necessity of voting to Board
<input type="checkbox"/> Once approved by Board or Treasurer, email PDF of finalized Budget Form and final signed contracts to Treasurer along with payment instructions	Treasurer will process payment for deposit once instructions are received from Event Owner
<input type="checkbox"/> Confirm with venue that space is held	Confirm that costs are fully loaded (include applicable taxes and gratuities)
<input type="checkbox"/> Create event registration link	Event owner to follow up with communications committee after Treasurer/Board approval

Two to Four Weeks Before Event

TASKS	BEST PRACTICES
<input type="checkbox"/> Arrange for a photographer to cover the event, if desired	
<input type="checkbox"/> Create event timeline (i.e. breakdown of event timing, speakers) and review with sponsors, hosts, speakers, panelists, etc.	
<input type="checkbox"/> Set menu with caterer	
<input type="checkbox"/> Finalize audio/visual requests	
<input type="checkbox"/> Confirm event volunteer staff to help with registration	<ul style="list-style-type: none"> • Recommend at least two people at registration and one additional person helping with speakers, venue, etc. • Recommend assigning specific roles and times for each volunteer
<input type="checkbox"/> Purchase speaker gifts	<ul style="list-style-type: none"> • For alumni speakers, Kellogg-branded items are appropriate • Reach out to communications committee to see if the Office of Advancement has extra gifts you can use • Kellogg-branded gifts can be purchased at the Kellogg Emporium: kellogg.bncollege.com • For faculty speakers, we suggest a restaurant gift card, since they likely have enough Kellogg gear
<input type="checkbox"/> Post event on club's Facebook, LinkedIn and Twitter	Event owner to follow up with communications committee
<input type="checkbox"/> Monitor volume of registration attendees and reach out to Board if volume is lower than expected, or if there has been a significant change in expected costs. Discuss need to send out additional email and/or open up event to other groups.	<ul style="list-style-type: none"> • To monitor the list of those who have registered, click on the "Attendees" button on the event registration page in iModules • Consider opening up event to other groups: other MBA schools, Kellogg students, NW law school, EMP students in town, etc.
<input type="checkbox"/> Create event registration link	Event owner to follow up with communications committee after Treasurer/Board approval

One Week Before Event

TASKS	BEST PRACTICES
<input type="checkbox"/> Confirm attendance numbers with caterer	
<input type="checkbox"/> Coordinate with speaker any presentation materials (slides, brochures, etc.) and audio/visual needs	
<input type="checkbox"/> Print and pick up any needed signage	
<input type="checkbox"/> Set up survey email	

One to Two Days Before Event

TASKS	BEST PRACTICES
<input type="checkbox"/> Close online registration 24 hours before event	
<input type="checkbox"/> Print name tags for registration attendees	Event owner will need to purchase name tag stickers
<input type="checkbox"/> Send registration list to venue security if required	
<input type="checkbox"/> Print or download registration list for use at registration/check-in table	Consider using printed name tags to identify no shows (leftover name tags) in lieu of a hardcopy registration list

Day of Event

TASKS	BEST PRACTICES
<input type="checkbox"/> Arrive one hour before event start time	
<input type="checkbox"/> Review all final details with on-site venue staff and check audio/visual equipment	
<input type="checkbox"/> Set up registration area and name tags	

Post Event

TASKS	BEST PRACTICES
<input type="checkbox"/> Update registration list with Shows and No Shows and send to communications committee	
<input type="checkbox"/> Post pictures to Facebook page	
<input type="checkbox"/> Generate post-event survey	
<input type="checkbox"/> Send thank-you email with survey link	
<input type="checkbox"/> Compile all receipts and send to club treasurer for reimbursement	
<input type="checkbox"/> Analyze and distribute post-event survey results	
<input type="checkbox"/> At next board meeting, provide feedback to the board on performance vs. budget	
<input type="checkbox"/> Send registration data and NPS scores to Alumni Clubs and Affinity Networks Team	

Setting Up a Club or Affinity Network Bank Account

- Take your EIN to the bank of your choice
- Use the name of the alumni club or affinity network to set up your account
- Determine two co-signers for the checking account who will be responsible for writing checks on the account (all check writers will need to be present to provide signatures)
- Share bank statements for the alumni club or affinity network monthly with the president and treasurer
- Share bank statements for the alumni club or affinity network at least quarterly with the board

Sample Bylaws

Bylaws are an organization's internal operating rules. Kellogg's Office of Advancement has drafted sample bylaws to fit the needs of Kellogg's alumni clubs and affinity networks that are incorporating as a nonprofit and applying for tax-exempt status. Changes or additions may be required to fit the particular needs of the regional clubs or local law. The specific requirements governing bylaws are determined by each state.

The bracketed language within certain sections includes items that need to be decided upon by the club or affinity network, and suggestions from the Office of Advancement or IRS-approved language.

Sections of the bylaws are labeled as "recommended" or as "encouraged." Please edit these sample bylaws in a manner consistent with club or affinity network objectives and with the State laws in which your group is incorporated.

Sample Alumni Club or Affinity Network Bylaws

Article I: Name and Purpose

Section 1. Name

The name of this club shall be the Kellogg Alumni Club of [name club here].

Section 2. Purpose and Mission

[Note: An alumni association filing for 501(c)(3) should establish that it is organized to promote the welfare of the university with which it is affiliated. The IRS offers this sample language for bylaws/constitutions:]

[Sample purpose and mission for clubs incorporating as 501(c)(3):] The Kellogg Alumni Club of [name club here] is organized to promote the welfare of the [Northwestern University's Kellogg School of Management] and will be operated exclusively for educational and charitable purposes as the terms are used in IRC 501(c)(3).

The specific purpose of the Kellogg Alumni Club of [name club here] is twofold.

To serve the alumni community by:

- a. Providing alumni access to a trusted personal and professional network
- b. Facilitating exposure to thought leaders and meaningful opportunities for intellectual development and lifelong learning
- c. Collaborating with Kellogg staff to increase the value of the network to Kellogg alumni

To support Northwestern University's Kellogg School of Management by:

- a. Representing and strengthening the Kellogg brand in the community
- b. Supporting Kellogg's efforts to recruit and yield high-quality degree-program applicants

[Sample purpose for clubs incorporating as 501(c)(7):] The Kellogg Alumni Club of [name club here] is organized and will be operated as a club exclusively for pleasure, recreation and other similar non-profitable purposes as the terms are used in IRC 501(c)(7).

The specific purpose of the Kellogg Alumni Club of [name club here] is twofold.

To serve the alumni community by:

- a. Providing alumni access to a trusted personal, professional and social network

- b. Facilitating exposure to thought leaders and meaningful opportunities for intellectual development, lifelong learning and social interaction
- c. Collaborating with Kellogg staff to increase the value of the network to Kellogg alumni

To support Northwestern University's Kellogg School of Management by:

- a. Representing and strengthening the Kellogg brand in the community
- b. Supporting Kellogg's efforts to recruit and yield high-quality degree-program applicants

Article II: Membership

Section 1. Qualifications

[Sample for clubs incorporating as 501(c)(3):] Membership to Kellogg Alumni Club of [name club here] shall be open to graduates from the Kellogg degree and candidate programs including but not limited to the programs listed below and who reside in the territory of the club or who have special interests that affinity networks support.

[Sample for clubs incorporating as 501(c)(7):] Membership to Kellogg Alumni Club of [name club here] is restricted to graduates from the Kellogg degree and candidate programs including but not limited to the programs listed below and who reside in the [name of club territory] territory of the club or who have special interests that affinity networks support. Membership is not open to the general public.

[Note: If incorporating as a 501(c)(7), review the membership requirements and gross receipts test on the [IRS website](#).]

[Following the sample 501(c)(3) and 501(c)(7) membership statements, include the list of Kellogg programs below. If programs expand, then articles may require amendments.]

Kellogg Programs:

- Full-Time MBA
- Evening & Weekend MBA
- Executive MBA
- Doctoral
- JD-MBA
- MMM
- International Executive MBA Programs:
 1. HKUST School of Business and Management - Hong Kong University of Science and Technology
 2. Recanat Graduate School of Business - Tel Aviv University
 3. Schulich School of Business- York University
 4. Otto Beisheim School of Management WHU
 5. Guanghua-Kellogg Executive MBA Program - Peking University
- Executive Education Certificate Programs:
 1. Advanced Executive Program
 2. Executive Development Program
 3. Executive Scholar recipients

Section 2. Honorary Members

The Board of Directors, by affirmative vote of [#] of the members of the Board present, may from time to time extend and grant an Honorary Membership to any person who is not eligible for Regular Membership. [Note: Coordination with the Office of Advancement is encouraged.]

Section 3. Voting Rights

Each regular and honorary member shall be entitled to one (1) vote on each matter submitted to the vote by the members.

Section 4. Liabilities of Members

The members of the [name club here] shall not be personally liable for the debts, liabilities or obligations of the Club.

Article III. Meetings

Section 1. Annual Board Meeting

An open annual board meeting of the club shall be held on a date to be agreed on by the board. Meetings shall be at such time and place as may be designated by the Board of Directors.

[Note: Suggested items for discussion at the annual board meeting include election of directors, review of bylaws or other legal documents and other business as may properly be brought before the meeting.]

Section 2. Regular Board Meetings

Meetings of the Board of Directors and Officers will be held monthly or [#] times per calendar year.

Section 3. Executive Officer Meetings

Executive Officers of the Board will schedule [recommend 2-4] strategy meetings per year in coordination with their Kellogg regional alumni relations officer and/or KAC Club Partner (if applicable).

Section 4. Special Meetings

Special meetings of the Club may be called for any purpose, at any time, by the President or by a majority of the Board of Directors.

Section 5. Notice

Notice of meetings and elections shall be given to all members who vote.

[Notes]:

- Coordination with the Office of Advancement and KAC Club Partner (if applicable) is encouraged.
- If inviting members to club meetings, you may want to consider including the following sections in the club bylaws:

Section 6. Voting

All board members in good standing shall be entitled to [#] vote upon any matter coming before the club at the annual, regular and special meetings.

Each regular and honorary member shall be entitled to [#] vote.

Section 7. Quorums

A simple majority of the attendees shall constitute a quorum for the transaction of business.

Article IV: Board of Directors

[Note: See a sample Board composition at the end of the bylaws.]

Section 1. Composition

The administrative body of the Kellogg Alumni Club of [name club here] shall be composed of a Board of Directors (the “Board”).

The current President(s) of the club will serve as Chairperson(s) of the Board, and the President-elect will serve as Vice-Chairperson. The immediate past-President will also serve on the Board. In addition, the Board will consist of not less than [#] nor more than [#] elected Directors. **[Note:** The state in which you incorporate your nonprofit will set the guidelines for the minimum number of board members that should be on your board.] The Board shall be as follows:

- Past-President
- President
- President-elect
- Treasurer/Secretary
- Community Manager

[Note: Additional officers may be required based on individual club needs.]

Section 2. Term Limits

Board members may serve no more than two consecutive years in any one position and no more than [X] consecutive years on the board. **[Note:** Kellogg recommends no more than 6-8 consecutive years on the board.]

Once a board member has been off the board for at least one year, they may be eligible to participate on the board again.

Each member shall hold office until (i) his or her successor has been elected or reviewed and approved by the Board of Directors, (ii) his/ her resignation, (iii) he or she ceases being an active member of the club, (iv) he/she shall have been removed from office by [#] vote of the Board of Directors. See “Article IV Section 4” for Removal of Officers or Resignation.

Past Presidents of the club may not serve as President of the club for a period of four years after their term as president concludes.

Section 3. Attendance

The Board of Directors shall attend all meetings of the Board with the exception of [#] absences per year excused by the President. Additional absences require Board approval. More than one unapproved absence from Board meetings within a year is grounds for removal from the Board.

Section 4. Removal of Officers or Resignation

Any member of the alumni club can submit a request for review or Board member removal from the club to the club President (or if President review/removal, to the President-Elect) for any act that is a violation against the club mission, has breached the spirit in which the Club functions, has been negligent in its board member duties, has brought discredit to the reputation of the Club or the School or has otherwise acted in ways deemed inappropriate by the Club or School.

The club President (or President-Elect if for the review/removal of the President) will talk to the Board member in question and may decide to present it to the board and Kellogg Office of Advancement. The board member can then be removed by a simple majority vote of the board.

Section 5. Reinstatement of Membership

By an affirmative vote of [#] of the directors present at a regular or special meeting of the club, a former or suspended director may be reinstated to membership on such terms as the Board may deem appropriate.

Section 6. Vacancies

If an officer position becomes vacant for any reason, the [Board of Directors or Executive Committee] shall have the power to appoint any qualified person to fill such vacancy, who shall hold office for the unexpired term of the predecessor officer and until a successor is elected and qualified.

Section 7. Duties of the Board of Directors

President or Co-Presidents: The President(s) shall be the chief executive officer(s) of the club and shall have general supervision and control of the affairs of the club.

The President of the club shall serve as Chairman of the Board meetings. He or she will select a replacement from the Board if absent. The President(s) shall preside over meetings of the officers and members of the club.

The President(s), along with the Treasurer (or other officer of the club), shall enter into contracts on behalf of the club, subject to approval of the Board.

The President(s) facilitates the development of a strategic plan and calendar of events for the club, in partnership with the Office of Advancement.

The President(s), in partnership with the Office of Advancement and the club leadership, plans for well-suited successors for the Officers to assure the continuation of a successful and effective Kellogg Alumni Club.

The President shall serve as the registered agent in the club's Articles of Incorporation. [**Note:** This may be the role of the Treasurer instead.]

President-Elect: The President-Elect shall be the chief operations officer of the club and shall be responsible for the management and operation of the committees of the club through the committee chairpersons.

The President-Elect shall assume all powers and duties of the President in the event that the President shall be absent or unable to complete his term of office.

Treasurer: The Treasurer shall collect all money payable to the club, shall arrange for safekeeping of funds of the club, shall make disbursements from such funds in accordance with prudent business practices, shall keep the club's financial records, and shall report to the Board as to receipts and disbursements.

At the annual meeting, the Treasurer shall give a report of the club's receipts, disbursements, and financial condition to Board members.

The Treasurer shall complete the annual financial report procedures required by the State and Federal government.

The Treasurer will be authorized to open a bank account in the name of the club and deposit all funds therein.

The Treasurer shall serve as the registered agent in the club's Articles of Incorporation. [**Note:** This may be the role of the President instead.]

Secretary: The Secretary shall prepare and distribute/post the meeting agenda, keep the minutes of club meetings, serve as custodian of the records of the club, conduct correspondence and liaise with the Office of Advancement on the results of the meetings.

Community Manager: The Community Manager makes a commitment to helping build the Kellogg community online. This includes, but is not limited to, welcoming new members to the space, initiating conversations on topics of interest and sharing helpful discussions. This position will work closely with Kellogg's community manager to make the club's online presence a meaningful place for members and a valuable place for the Board.

Article V. Executive Officers of the Board

Section 1. Composition

The Executive Officers of the Board shall provide general direction and ensure that club activities adhere to bylaws and Kellogg Clubs Operating Guidelines. It is responsible for annual planning and documentation of plans, processes and best practices. The Executive Committee shall be as follows:

- Past-President
- President
- President-elect
- Treasurer

Section 2. Management and Purpose

The Executive Officers of the Board are responsible for reviewing results of the past year, connecting strategy to the day-to-day operations of an organization and providing guidance for the coming year's plan. Duties include:

- Review and approval of changes to bylaws
- Review and amend strategic plan based on market needs
- Review and approval of the outgoing President's duties
- Review and approval of the incoming President's plans for the coming year

In addition to monthly Board of Directors meetings, the Executive Committee shall schedule [2-4] strategy meetings per year in coordination with their regional alumni relations officer and/or KAC Club Partner (if applicable).

Article VI. Elections

Section 1. Recruitment Process

The Board of Directors will review the mission, vision, goals and strategies of the organization and then determine any new skills, knowledge and other attributes that future board of directors need to possess in order to advance the strategic plan.

[Note: Because board recruitment and nominations are vital to club succession, the identification and recruitment process should be a year-round, ongoing activity. It should include setting clear recruiting priorities, updating job descriptions and clarifying board member responsibilities.]

Section 2. Nominating Committee

The President(s), with the approval of the [Board of Directors or Executive Committee], will appoint a Nominating Committee.

The Nominating Committee is charged with collecting, reviewing and presenting candidates for membership on the Board of Directors and for additional voting members. The Committee maintains the list of qualified available candidates.

[Notes:]

- If following an academic calendar year schedule, it is recommended that clubs form a nominating committee in the spring.
- Nominating committees should include an odd number (three or five) of members who are knowledgeable about both the strategic directions and priorities of the organization and the workings of the board (it may be beneficial to your club to invite a former or present executive board officer to chair the nominating committee).
- Clubs may want to ask nominees to submit an application with one of more of the following:
 1. Letter of intent and level of interest in serving on the Board
 2. Description of what the candidate believes to be the major concerns facing the community and the skills or experience he or she can contribute
 3. Description of how the nominee will provide the necessary time for board service in light of his or her current work demands

Section 3. Nomination and Election Processes

[Note: Nomination and election processes vary from organization to organization. Two different models have been outlined below:]

[Option 1:] Elections at the annual meeting

The Nominating Committee shall nominate for the consideration of the voting members of the Club a slate of officers and Directors to be voted upon at the Annual Meeting. The Nominating Committee shall notify the Board in writing (which may be by email) of the proposed slate [30-60] days prior to the Annual Meeting of the Club.

The consent of each candidate must be obtained before his or her name is placed in nomination.

If there is an objection to the slate by a Board member(s), that member(s) must notify the Nominating Committee [#] after the slate has been released. The Nominating Committee will ask that member(s)

to submit a petition signed by [#] of board members, specifying the candidate(s) to be challenged and new nominee(s), [#] days prior to the annual meeting.

[Note: Clubs may ask that petitions include the following items from the nominee:

1. Letter of intent and level of interest in serving on the Board
2. Description of what the nominee believes to be the major concerns facing the community and the skills or experience they can contribute
3. Description of how the nominee will provide the necessary time for board service in light of his or her current work demands
4. Written consent of the challenger to be nominated]

Election of Board members and officers is held at the annual meeting. At the meeting, the Nominating Committee will present the slate(s) and the [Board or voting members] shall vote. The slate that passes by a quorum shall be considered elected.

[Option 2:] Approval of slate at the board meeting and elections at the annual meeting

The Nominating Committee shall nominate for the consideration of the voting members of the Club a slate of officers and Directors to be voted upon at the Annual Meeting. The Nominating Committee shall notify the Board in writing (which may be by email) of the proposed slate at least [three] days prior to the Board meeting that precedes the Annual Meeting of the Club. The consent of each candidate must be obtained before his or her name is placed in nomination.

At such meeting, the Board shall consider and vote upon the proposed slate. If the proposed slate passes by a quorum, it shall be deemed approved by the Board.

If the slate does not pass by a quorum and there is a challenge, the Nominating Committee must receive a petition signed by [#] [voting or board] members, specifying the candidate(s) to be challenged and new nominees, [#] days prior to the annual meeting.

[Note: Clubs may ask that petitions include the following items from the nominee:

1. Letter of intent and level of interest in serving on the Board
2. Description of what the candidate believes to be the major concerns facing the community and the skills or experience he or she can contribute
3. Description of how the nominee will provide the necessary time for board service in light of his or her current work demands
4. Written consent of the challenger to be nominated]

If any such petition is received, a new slate of candidates will be announced and all proposed slates shall be communicated to voting members [#] days prior to the Annual Meeting. Election of Board members and officers is held at the annual meeting. At the meeting, voting members shall consider and vote upon the proposed slates. The slate that passes by a quorum shall be considered elected.

If there are no challenges, the notice of the Annual Meeting of the Club shall include the names of all persons nominated to serve as Directors and officers and all persons who will continue in office. The slate shall be deemed to have been nominated without the need for any seconding nominations at the Annual Meeting. Any other names for any of the other positions to be filled may be nominated and seconded from the floor at each Annual Meeting, provided the consent of the nominee has been obtained.

Section 5. Notification of New Officers

Notification of new officers shall be communicated promptly to the Kellogg Alumni Relations Office and posted on the club's website.

Article VII. Distribution of Assets

Section 1. Distribution of Assets

[Note: By law, upon dissolution (termination), a nonprofit corporation must donate any excess assets to another organization within the meaning of section 501(c)(3) of the Internal Revenue Code or to the government. If planning on obtaining 501(c)(3) tax-exempt status, the IRS requires certain wording. The IRS offers this sample language]:

[Sample purpose for clubs incorporating as 501(c)(3)]: Upon the dissolution of the corporation, club assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government or to a state or local government for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction in the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

[Note: Naming a specific organization, such as Northwestern University , to receive your assets upon dissolution will only be acceptable if your articles state that the organization is exempt under 501(c)(3) at the time your dissolution takes place and your articles provide for an acceptable alternative if the specific organization is not exempt.]

[Sample purpose for clubs incorporating as 501(c)(7)]: Upon the dissolution of the corporation, assets shall be distributed to... [Note: Include here where assets shall be distributed, such as Northwestern University. If not Northwestern University, assets need to go to such organization or organizations organized and operated exclusively as social and recreation clubs or for charitable or educational purposes as shall at the time qualify as an exempt organization or organizations under IRC 501(c)(7) or IRC 501(c)(3) of the Code as the Board of Directors shall determine]. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction in the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

Article VIII. Ethics/Conflicts of Interest

The Kellogg Alumni Club of [name club here] represents the Kellogg School of Management to its alumni constituents and should therefore operate in a manner that is both consistent with and reinforcing of the core Kellogg School of Management brand.

Section 1. Ethics/Conflicts of Interest

Club officers, directors and members shall operate in a professional/ethical manner that does not allow for the mixing of personal or commercial business with Club activities or communications.

[Note: The bylaws should contain language prohibiting inurement (members profiting from the club) and outlining how the club will use its money. The IRS offers this sample language for bylaws/constitutions]:

No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to, its members, trustees, officers or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the mission statement.

[Note: The bylaws/constitution must clearly prevent the Club from participating in politics, lobbying or otherwise attempting to influence legislation. The IRS offers this sample language for bylaws/constitutions]:

No substantial part of the activities of the Kellogg Alumni Club of [name of club here] shall be the carrying on of propaganda or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Section 2. Data Confidentiality

The Club will consider all alumni data as highly confidential information. The Club will not use membership and/or alumni data for commercial purposes. This data is available for networking purposes only. The Club will protect this data from theft and/or misuse with high-security passwords, firewalls and other appropriate measures.

Article IX. Amendments to Bylaws

Section 1. Amendments to Bylaws

Proposed amendments to these Bylaws shall be presented to the Board of Directors in writing. These proposed amendments shall become effective if approved by a [X] majority of the directors.

Leadership Responsibilities

All Club and Affinity Network Leaders

- Know and understand the group's bylaws and governance structure
- Maintain communications with the Alumni Clubs and Affinity Networks Team on activities, events and financials
- Manage historical records and current files that will serve as a reference for future officers

Club and Affinity Network Presidents

- Plan and conduct board meetings
- Ensure that officers complete and submit reports by deadlines
- Maintain a contact list of the club or affinity network leadership team
- Set the leadership tone by being efficient, inspiring and enthusiastic
- Officially represent the club or affinity network at civic affairs
- Delegate responsibility to other members of the board
- Work closely with individual officers and be prepared to coach and mentor when necessary
- Attend leadership training and networking opportunities in order to bring information back to the leadership team
- Ensure board members adhere to policies pertaining to alumni procedures
- Hold an annual program planning session to evaluate the group's strengths and areas for improvement
- Appoint volunteers in accordance with club or affinity network bylaws

Club and Affinity Network Treasurers

- Manage all financial details, including, but not limited to, bank accounts, reimbursements, venue deposits and varied bills
- Serve as billing contact for all club or affinity network financial matters
- Manage the process for obtaining an EIN and bank account, if required, and maintain the bank account
- Keep signatures on bank account up to date and provide annual reports to the club or affinity network leadership team and the Office of Alumni Relations
- Prepare a budget for approval by the leadership team

How to Incorporate as a Nonprofit Entity

1. Draft Articles of Incorporation. Articles of Incorporation are an official statement of creation of an organization filed with the appropriate state agency. The content requirements vary from state to state. As a general rule, you should include only what the law requires. Your bylaws, which are more easily amended, will handle more detailed policies to govern your organization.

Normally, you would include the following items in the Articles of Incorporation:

- Name of the corporation
- The organization's specific purpose
- Duration of the corporation's existence
- Names and addresses of the initial board of directors
- Provisions for distribution of assets when the corporation is dissolved

2. State-Specific Requirements. Each state operates independently, with different fees, guidelines and regulations. For example, some states require nonprofit organizations to register with the attorney general's office and send periodic reports on the allocation of the nonprofit organization's funds. Clubs and affinity networks are encouraged to contact their secretary of state and request all of the forms and information required to:

- Incorporate as a nonprofit corporation
- Apply for state and federal income-tax exemption (this is done after the IRS has granted the club tax-exempt status)
- File annual reports (this is in addition to filing an annual return)
- Amend the articles of incorporation

We encourage clubs and affinity networks to contact their state secretary's office for the most up-to-date information.