



The Office of Schools Marketing Committee

## **Keeping in Touch with Alumni & Friends**

### **Keeping in Touch with Alumni and Friends**

Keeping these constituents well informed of what is going on with their alma mater is critical to the success of recruiting new students, fundraising and annual appeals. This section provides you with program ideas to help keep you in touch with alumni and friends.

### **Table of Contents**

- **Creating Stronger Alumni Relationships**
  - **Creating Effective Alumni Groups**
  - **Sample Alumni Interest Survey**
  - **Sample Alumni Information Sheet**

## Creating Stronger Alumni Relationships

### Introduction

Alumni are the living history of your school. A strong relationship with your graduates should be cultivated because *it is good education*, not just because they can provide financial support for the school. In fact, there is no better way to guarantee failure in your efforts to develop a supportive alumni group than to ask for support without having cultivated a sense of connection and ownership. This takes time and effort.

The materials in this section focus on creating a relationship with your alumni, and then keeping efficient records.

### Creating Stronger Alumni Relationships Supporting Documents

- “Creating Effective Alumni Groups” – notes and an outline

#### *Application*

While the outline focuses on schools that are in the early stages of developing alumni groups, the notes apply even if you have an active organization.

- Sample Alumni Interest Survey and Sample Alumni Information Sheet

#### *Application*

Record keeping is essential to a well-run alumni group. These forms will help you solicit input and support from *alumni you have already cultivated*, and track their responses and other information.

## Creating Effective Alumni Relationships

The following outline presents in step-by-step format the elements in the development of an alumni group or association. They are geared to schools, which are in the beginning stages of the process, but can also serve as a checklist or evaluative instrument for programs in other stages of development.

### I. INTRODUCTION

- A. Should be part of overall PR/Communications planning
  - 1. Fits school mission, philosophy
  - 2. One of many activities
  - 3. Should have goals, budgets, evaluation

### II. DEFINITION

A. Adapted from Jerry Jarc “Alumni Associations are formed to create/maintain relationships with graduates, to facilitate ongoing relationships among graduates, to maintain goodwill and to provide opportunities for graduates to help sustain, enhance and support the school for future generations.”

### III. PURPOSE

- A. To build and share community
  - 1. Coleman/Greeley -- reason for success of Catholic School
  - 2. Living community with history and future
  - 3. Catholic school is more than students and faculty
- B. To provide core of support
  - 1. Group with history of ownership
  - 2. Useful for planning, enrichment, recruitment, volunteers
- C. To support development and fundraising
  - 1. Obvious need and objective
  - 2. Wait for right time (see below)
  - 3. Not the only motive, or even the best/first
    - a. Will sense and resent insincerity

#### IV. GOALS: The four “I’s” -- in proper order

- A. *Identification* -- who/where are they?
- B. *Interest* -- create the need to know
- C. *Involvement* -- create the desire to connect
- D. *Investment* -- time, talent, and treasure

#### V. PROCESS

- A. Someone takes the initiative, creates the commitment
  - 1. ID core group, consult, establish mindset
    - a. May be principal, need not be final mover
    - b. Assign introductory tasks to core group
  - 2. Create and budget resources -- funds and personnel
- B. *Identification*
  - 1. ID both those who are and those who know
  - 2. Obvious groups
    - a. Graduates
    - b. Parents/families of graduates
    - c. Parents/families who are graduates
    - d. Spouses and families
  - 3. Create vehicles for contact -- goal is data base -- computerize
    - a. Alumni specific (e.g. newsletter)
    - b. Community: parish bulletins, school newsletters, etc.
    - c. General community: newspapers, flyers, malls, etc.
    - d. Direct mail
      - i. Last known address
      - ii. Family address
      - iii. Pay for address correction
      - iv. “Phone home” activities
    - e. Social networking sites (e.g. Facebook, LinkedIn, etc.)
- C. *Interest*
  - 1. Establish contact persons, “captains”
  - 2. Newsletters, notes, contact book
  - 3. Involve students
  - 4. Establish plan of activities
  - 5. Do not ask for money yet
- D. *Involvement*
  - 1. Familiarize graduates with mission, philosophy, activities
  - 2. Make simple requests that guarantee positive response

3. Invite for kick-off event
    - a. Open house
    - b. Meet?
    - c. Traditional activity?
    - d. Hall of Fame
    - e. “First Farewell” program
    - f. “Connecting the Dots” program
  4. Do not ask for money yet
- E. *Investment* -- invite support -- NOW you can ask for money
1. Support of what? -- mission and plan
  2. Make invitations as attractive as possible – people sympathize with losing causes, they don’t necessarily support them financially
  3. Make invitation as specific as possible
    - a. Where, when, who, why, how long?
    - b. Which goal(s) is it intended to meet?
    - c. If fundraising, what is target? – what positive effect will accrue?
  4. Create variety of opportunities for gifts
    - a. In-kind
    - b. Presence, advice
    - c. Deferred giving
    - d. Networking
  5. Develop plan for recognition
    - a. Always say thanks
    - b. Involve students
  6. Some obstacles
    - a. Time -- wrong time or too little time allowed
    - b. Other loyalties -- e.g., college or spouse’s school
    - c. Bad experience
    - d. Apathy/other involvements

## VI. ACTIVITY

- A. Levels of commitment
1. Major -- board, committee work -- organizational leadership
  2. Specific tasks -- representatives, volunteers -- implementation
  3. Participation -- general membership and support
- B. Types of activity
1. Reunions
  2. Presence at school activities
  3. Curricular/extra-curricular involvement
  4. Recruitment/retention

5. School Advisory Committee membership
  6. Honors and commemorative activities
  7. Newsletters and contact vehicles
  8. Informal advice/support
  9. Mentoring current Middle School children
- C. Fundraising/Advancement activities
1. Determine needs and goals
  2. Establish strategies
    - a. Direct mail -- annual fund/alumni fund
    - b. Phone-a-thon
    - c. Grant writing -- contacts, expertise
    - d. Deferred giving -- especially wills and insurance
    - e. Capital campaign
    - f. Endowment
    - g. Consider consultant support
- D. Special problems of merged schools
1. Identify key contact people
  2. Bind them both to mission and personalities -- make them insiders
  3. Recognize/celebrate divided loyalties and ties
  4. Transfer loyalties over time



The Office of Schools Marketing Committee

### Sample Alumni Interest Survey

Name: \_\_\_\_\_ Class Year: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone(s): (H): \_\_\_\_\_ (W): \_\_\_\_\_ (Cell): \_\_\_\_\_  
 Email: \_\_\_\_\_

Please check any area that you have an interest in at any level of participation.

#### Class Representative

- I would be interested in becoming an active class representative and attend monthly meetings to help organize and operate the association.
- I would be interested in becoming a special class representative and help with a special activity of my interest. This commitment generally involves attending quarterly, semi-annual or annual meetings. (Indicate your interest in the survey below)
- I would be interested in participating in the activity indicated below.

#### Development/Fundraising

- Phone-a-thon  Auction  Newsletter  Phone-a-thon Team Captain  Auction Sponsorship  Ad Solicitation  Phone-a-thon Team Caller  Auction Gift Gathering  Ad Purchase  Phone-a-thon Volunteer  Auction Attendance

#### Activities and Events

- Monte Carlo Night  Softball/Sports Tourney  Class Reunion  Hall of Fame Dinner  Golf Tournament  Walk-a-thon  Grandparents' Day  Steak Fry

#### Services

- Newsletter  Database Management  Publicity/Marketing Projects  Writer  Development Committee  Development Projects  Layout  Marketing Committee  Representative to Athletics  Mailing Assistance  Recruitment Committee

#### Other

Please indicate below any other interests you may have in this space.

*Please return the completed survey to:*

St. Patrick Alumni Association  
 123 Shamrock Road  
 Greenville, NJ 12345  
 Email: [St.Patrick@spsnj.org](mailto:St.Patrick@spsnj.org)



The Office of Schools Marketing Committee

## Sample Alumni Information Sheet

We really want to hear from you! Where have you been? What is new and exciting? How big is your family? Do we have your current address? Interested in what your former St. Patrick friends and acquaintances have been up to? We want to hear what you have been doing. We also want to share with you how St. Patrick is continuing to grow.

Therefore, we need to hear from you! Update St. Patrick's by sending us your news—either through this form or by email ([St.Patrick@spsnj.org](mailto:St.Patrick@spsnj.org)) whenever you have something to tell us—no matter how big or small. We look forward to hearing from you!

### Personal Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone(s): (H): \_\_\_\_\_ (W): \_\_\_\_\_ (C): \_\_\_\_\_

Email Address: \_\_\_\_\_

Birthday: \_\_\_\_\_

Marital Status: S M D W Name of Spouse: \_\_\_\_\_

Names and Ages of Children: \_\_\_\_\_

### School & Professional Information

St. Patrick Graduation Year: \_\_\_\_\_

High School Attending or Attended: \_\_\_\_\_

College Attending: \_\_\_\_\_

Major: \_\_\_\_\_

Other Degrees: (Degree Name, School Attended) \_\_\_\_\_

Business and Position:

\_\_\_\_\_



The Office of Schools Marketing Committee

**News**

News about yourself, family, and or other graduates you know:

---

---

---

Do you want to take an active part in the Alumni Association? Yes No

Are you willing to serve as a class representative? Yes No

Thank you for completing this form. Please send it to:

St. Patrick Alumni Association  
123 Shamrock Road  
Greenville, NJ 12345  
Email: [St.Patrick@spsnj.org](mailto:St.Patrick@spsnj.org)