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Courtesy of Mesa Community College

Training Camp

Schools large and small host training programs for their alumni volunteers—but how can you measure success?

By [Leah Kerkman Fogarty](#)

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Grinnell College alumni love talking about their alma mater, but that enthusiasm hasn't always translated into high reunion attendance. Advancement staff members at the Iowa college saw a way to increase alumni engagement by creating more opportunities to help out at reunion, beginning with revamped training for its 50th reunion volunteers. With better structure and more-detailed tasks, the program led to an overall higher level of engagement.

It was a big effort with a big payoff. Attendance jumped from 18 percent for the 50th year reunion in 2011 to 41 percent in 2012, when parts of the new volunteer training program were piloted. The following two years, when Grinnell rolled out the entire training module, 50th year reunions had record attendance.

"This group of volunteers, with the training that we provided, helped us create a new benchmark for 50th reunion engagement—it was extraordinary," Jayn Bailey Chaney, director of alumni and donor relations at Grinnell, says of the Class of 1963. "They raised \$2.48 million for their 50th reunion efforts. Before that, our 50-year reunions were raising in the high six figures."

Using alumni volunteers as university ambassadors is a no-brainer, say advancement professionals. Most universities and colleges offer some kind of orientation or training for their alumni volunteers, but in recent years the trend has been to provide more robust, dedicated training. Many institutions hold training days, often tied to another on-campus alumni event, such as homecoming or an alumni weekend.

"The biggest advantage of on-site training is to give our alumni volunteers an understanding of what's happening on campus and what they need to be better at their roles," says John Pine, director of alumni outreach and programs at New York University.

Starting from scratch

"When trying to engage alumni, we quickly realized that we didn't have enough human resources to do all that we need and want to do," says Kristin Stetler, senior associate director of alumni relations at Bucknell University in Pennsylvania. "Volunteers help us do our strategic work. They are a way for us to reach out to our 52,000 alumni."

But using unpaid, non-staffers, no matter how good their intentions, can give many alumni relations professionals hives. Solid training is key to ensuring that volunteers are best representing their alma mater—and delivering the right messages and impressions.

"We want to know what they need from us, and we want them to know what we expect from them in return to ultimately achieve our mission," says Rebecca Keith, executive director of talent management at the Indiana University Alumni Association. Keith's philosophy is that volunteers are unpaid staff. Because of that, they should be part of the full talent management cycle: cultivation, retention, orientation and onboarding, training and development, performance management, and succession planning.



The scope of volunteer training programs can vary depending on an institution's size, budget, and staff limitations, but the key elements should remain the same.

Think before you train: Establish buy-in, and solicit suggestions from all interested parties, from staff members to alumni volunteers.

Tailor the training: Think about what specific details your alumni volunteers need to best represent your school, and create programming that addresses those issues.

To web or not to web: Provide support for your alumni volunteers through online resources, from webinars to web-based training modules.

- **Post-event follow-up:** Ask for feedback on how to improve the program for next time.

Think before you train

Like any complex organization, universities can have several people in the role of volunteer manager. When Catherine Biggs was hired for that position at the U.K.'s University of Cambridge two years ago, she found that many of the university's 31 colleges and various museums had their own volunteer managers—but many did not solely focus on that task. So Biggs set up a [Cambridge network group](#) to ensure consistent management and stewardship of volunteers.

"This has proved to be a godsend," Biggs says. "People love coming to the meetings. Many are doing volunteer management off the side of their desk," so they appreciate the guidance she provides, from protecting donor data to addressing U.K. visa restrictions for volunteers.

If staff buy-in is an important first step, creating and communicating program goals is a close second, Chaney says. "Volunteers want work that is meaningful," she says. If an organization hasn't thought about how it wants to use its volunteers, it will be a wasted opportunity, and staff members will be "spending too much time figuring out how to keep volunteers busy."

Getting volunteer buy-in for training is as important as staff buy-in, Pine says.

When he launched a training weekend aimed at familiarizing volunteers with the university's mission and goals, Pine created a committee from the university's various clubs and boards. "I used that committee as a focus group to develop a strategy for creating the [NYU Alumni Volunteer Conference](#)," Pine says. "We have a long tradition of active volunteers, and I wanted to make it even stronger."

Tailor the training

Once staff members and volunteers have both weighed in, you're finally ready to plan the training program.

Some of the details may be mandatory. Biggs at Cambridge is developing a program on U.K. laws that govern volunteering. Bucknell asks volunteers who deal with sensitive information—such as those helping with fundraising—to sign a confidentiality agreement.

Training programs should inform volunteers about current institutional priorities. Enrollment figures, branding initiatives, and capital campaign goals are commonly presented during orientation or training. Breakout sessions can provide information specific to various affinity groups. During these gatherings, international alumni group leaders or individual college alumni leaders can meet and learn from each other.

Organizers stress the importance of fun, too. One of NYU's most popular training events, Pine says, is an alumni speed-networking session, where attendees mingle with fellow volunteers, albeit quickly. Other universities offer attendees coveted swag, such as gear in red and white stripes, a signature of IU's training events.

When developing the two-day Bucknell University Alumni Leadership Summit, organizers considered the essential skills volunteers need to carry out their specific roles. "They have to understand what alumni relations' mission is, what our goals are, and how we fit into development and the broader university goals," Stetler says.

That may mean reminding alumni about how their alma mater has changed since they've graduated, says Marcy Snitzer, coordinator of alumni relations and communications in institutional advancement at Arizona's Mesa Community College.

"If I'm sitting with someone who went to Mesa in 1970, they know a very different institution," Snitzer says. "Our alumni advisory board members need to know our current programs and degrees and what our current student population looks like—they need to know what Mesa looks like today."

Sometimes this means educating volunteers about how to deal with preconceived notions about an institution.

At NYU's volunteer conference, a session called "Quieting the Naysayers" gave alumni talking points for combating negative comments about their alma mater. "It was about how to deal with negative energy around NYU," Pine says. "We armed our volunteers with tools to become better advocates."

To web or not to web

Training doesn't have to be done face-to-face. Virtual training lets you educate and connect with volunteers throughout the year at less cost. At Indiana, an email marketing maven—who's also an alumna—hosted a webinar to educate other volunteers on the university's email marketing software. As a result, staff members freed up some of their time, the alumna felt appreciated and valued, and volunteers gained a better grasp of the software.

"For staff and volunteers, we're continuing to learn—it's not just happening once a year," says Rachael Jones McAfee, IUAA's director of alumni communities and volunteer management. "Staff members are learning from volunteers, volunteers are learning from staff, volunteers are engaging in peer-to-peer learning. So if we can offer a wide variety of mediums for interactions to happen throughout the year, that is where the richest education happens."

In addition to online webinars, Indiana also has a dedicated Facebook page for alumni leaders and an intranet for alumni volunteers, which offers tools, news, and tips, from managing membership lists to recruiting millennial volunteers. The university, McAfee estimates, offers volunteer training opportunities to alumni at least once a month.



At Bucknell, Stetler's office hosts three web-based meetings per year for its alumni club volunteers to share and learn from each other, apart from the university's biannual volunteer leader summit. The events are held in the evening, Eastern Time, so people across the world can participate. "We've had club leaders from Australia and the West Coast call in," Stetler says. "We do a

balance of university and programmatic updates with club leaders sharing with one another."

You don't always need staff to support volunteers. At Mesa Community College, Snitzer assigns each incoming board volunteer to a veteran board member, who acts as a mentor.

"Volunteer-to-volunteer interaction can be rich," she says. "Sometimes they ask questions that they might not be comfortable asking me."

Post-event follow-up

Like any new program, the first year of a volunteer training program will be a learning experience.

"You take a lot of advice and do a lot of research, but ultimately, you're throwing spaghetti against the wall and seeing what sticks," NYU's Pine says.

Evaluating what worked and what didn't is key to keeping volunteers interested in future training events. Indiana's webinar series was launched to address alumni volunteers' suggestions in a more timely fashion than at the annual event.

Grinnell staff members set up annual calls or in-person meetings to provide feedback on a volunteer's performance and to learn what the volunteer needs, Chaney says. "That one-to-one interaction is important," she says. "Yes, we have monthly messages that go out to some of our alumni volunteers. But those are easy to ignore. It's a lot harder to ignore a phone call."

It's also important to offer praise, Pine says, which is why NYU awards outstanding programs and volunteers at its alumni volunteer conference. A panel of board members chooses the winners.

"I view that awards ceremony as a win-win," Pine says. "It was a win for the people who felt proud of what they got, but also because other people heard specific examples of amazing programs that our volunteers are doing to engage their fellow alumni."

Organizers say the whole point of a large-scale training event is to get your alumni volunteers energized, invested, and eager to represent your university. Over time, you will see how one idea can grow and spread—all because of a training session.

Keith Epperson, the alumni board president at Missouri's [Truman State University](#), knows this from experience. Several years ago, he presented a session about using alumni volunteers to organize freshman send-offs at various chapters—a chance for incoming freshmen and parents to connect with local students and alumni in their own regions. Today, says Epperson, almost every one of the association's 10 chapters hosts a send-off.

Providing training for your volunteers shows that you've invested in them. In turn, they will invest in you.

Volunteer Training Program Dos and Don'ts

DO borrow and share ideas. Turn to your colleagues at other schools and see what they are doing in terms of volunteer training. "There's no reason to reinvent the wheel," says John Pine, director of alumni outreach and programs at New York University. He borrowed from Emory University's volunteer training event, he says, when planning NYU's first one.

DON'T overreach or overplan. If you're a small school, you may not have an extensive volunteer base or the budget for large-scale training. Marcy Snitzer at Mesa Community College in Arizona provides orientation materials and follows up with each new alumni board volunteer one-on-one. The Athenian School, a private middle and high school in California, hosts volunteer training just one night a year in the fall.

DO think about your guest list. Who would benefit most from your training event? If the

answer is new volunteers, you might consider travel stipends, which NYU and Iowa's Grinnell College offer, to encourage younger alumni to attend.

DO invite as many as the budget allows. Allie Rowe, the Athenian School's director of development, holds an annual volunteer training for parents who help with the school's fundraising efforts. She encourages as many people to come as possible. "It's great to have this excuse to provide information on how we work," Rowe says. Those who attend her training event, she says, "end up being our most supportive donors," because they understand and appreciate how critical the school's fundraising is.

DON'T underestimate the power of face time. Organizers of volunteer training events prefer in-person orientation over online meetings. "One of the beauties of that on-campus experience is that we are capturing their time and attention. You don't do that with a webinar or online training experience," says Jayn Bailey Chaney at Grinnell. Most volunteer trainers suggest using online programming to supplement, not supplant, in-person training.

DO take it on the road. To attract a broad range of attendees, think outside the campus. Indiana, New York, and Bucknell universities have all hosted regional training events in cities with a large number of alumni volunteers.

About the Author

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Leah Kerkman Fogarty is a writer and editor living in Northern Virginia. She has covered nonprofit education topics her entire career.

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