



**EDUCATIONAL OPPORTUNITY ASSOCIATION**

A Midwest Association of TRIO and College Access  
and Success Professionals

# TRIO Alumni Engagement Toolkit

The toolkit was developed as part of the final project of Emerging Leaders  
Institute Cohort 2021.

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### INTRODUCTION

You may be reading this guide because you have been asked to implement a process that involves connecting with your program alumni to obtain information and engage them in your activities, events, and perhaps reach out to them for the purposes of donations and giving. This toolkit serves as a resource as ideas delineated below could be replicated in your locations, settings, and programs.

This guide provides a step-by-step process for determining what engagement activities can take place in your locations and programs, and which components need to be developed and modified to meet the needs of your program. This toolkit serves as an initial idea box and defines how the alumni engagement plan can be developed.

### TIPS FOR FACILITATORS

- Identify alumni of your program and gather contact information, including email addresses, phone numbers, and their whereabouts locations.
- Identified alumni participants should receive a *Welcome Letter* from the Program Director emphasizing their alumni status.
- Invite alumni participants to events/activities by sending flyers.
- Each event/activity should be evaluated and assessed to meet the needs of your program participants.

### TOOLS CONTAINED IN THE FACILITATOR'S GUIDE

Templates are provided below, and they can be modified to meet your individual needs. In this guide, you will find examples of:

- *Welcome Letter* - a one page overview to be sent to alumni (**Appendix A**).
- *Sample Flyer for engagement events and activities* (**Appendix B**).
- *Sample Letter for Donations/Giving* (**Appendix C**)
- *Sample Evaluation and Assessment* (**Appendix D**)



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## ENGAGEMENT ACTIVITY IMPLEMENTATION AT THE LOCAL LEVEL

### ⇒ Virtual Happy Hour

- Utilize online platform at your disposal to host an event: Zoom, Teams, or Skype
- Limit the happy hour to an hour
- A shorter time frame will encourage alumni to attend who have with busy schedules
- Develop interactive activities and questions for discussion
- Examples: Have attendees come prepared to answer a question (e.g., favorite drink), share their favorite activity/event as a TRIO student or a theme that attendees can follow
- Provide an opportunity to exchange contact information
- Provide RVSP form, provide the link to the form during the event or as a follow up email.

### ⇒ Virtual Trivia

- Utilize online platform at your disposal to host an event: Zoom, Teams, or Skype
- Create 4-5 categories/round with up to 10 questions to be read aloud to teams
- Categories can be broad such as movies, literature, TRIO, etc.
- Provide a Google Form with team name, drawdown for each round and short answer space to type in answers to each question
- Each team will have one person submit the Google Form on behalf of their team
- After each round, facilitator will give answers to trivia questions
- A facilitator or additional helper will need calculate each team's score
- Once each round in completed, the final scores will need to be calculated.
- If possible, provide winning team with a small prize.

### ⇒ #Throwback Options

- Utilize social media outlets to post pictures of alumni from their times in your program. Retrieve photos from trips, events, conferences, individual highlights, publications and/or any other alumni awards and achievements.



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- Verify the policy requirements to post personal information or photo on social media.
- Encourage alumni in contact to post and tag photos of themselves when they were in your program.
- Provide them with taglines such as #TRIOFUN; #TRIOLeaders; #TRIOTeams; #TRIOTeams; #TRIOSTEM; #TRIOGrad; #TRIOWORKS; #EOAAlum; #YourStateInstitution.

⇒ **Alumni Surveys**

- Create a listserv for your alumni, send quarterAsk for Feedback, to express their opinions on various matters. Provide specific questions that may benefit programs?
- Ask them to share their TRIO story



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## ENGAGEMENT ACTIVITY IMPLEMENTATION AT THE STATE/REGIONAL LEVEL

### ⇒ Alumni Professional Development

- Host small 1-2 day virtual workshops focused on areas that may be important to alumni, i.e. Negotiating your first Position, Becoming a part of TRIO as Staff, Becoming a Public speaker, Improving your Resume or CV, Strengthen your Professional Portfolio by Volunteering with TRIO, etc.

### ⇒ Alumni Engagement Awards

- Create 2 EOA Chapter awards to recognize chapter alumni engagement at the annual conference.

### ⇒ Alumni Conference Track

- Create a permanent conference track to solicit proposals about Alumni Engagement at the program, state, regional or national level.
- Target Alumni software companies as potential vendors or sponsors of future EOA conferences.

### ⇒ Alumni Business Listing

- Create a directory of Alumni owned Businesses by category.
- Promote businesses on EOA Website and share through EOA listserv.
- Invite businesses to conferences as vendors and or sponsors.

### ⇒ Alumni Adhoc Committees

- Establish at least 1 Adhoc committee to assist with additional responsibilities associated with Alumni, i.e. Social Media, Website, special programming, etc
- Evaluate the need for additional committees as needed

### ⇒ Alumni Discount Program

- Investigate feasibility of establishing EOA Alumni Program to share benefits from specific companies in the regions, insurance, hotels, restaurants, etc.

### ⇒ Speaker's Bureau

- At the state and regional level, create a list of Alumni willing to serve as keynote or panelist. Group by key TRIO topics, i.e. Financial Literacy, Leadership, Student



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Involvement, STEM, College Transitions, Unique Careers, Nutrition Tips, etc. Share via website or EOA and chapter listservs.

⇒ **Alumni Day**

- At the state and/or regional levels establish a day when all graduating students are recognized as future TRIO Alumni. This could happen at end of the year award ceremonies or a set day like **May 1.**
- Present small token, like a TRIO Alumni lapel pin, button or key chain.
- At Regional level, create incentive drawing (30-50 prizes) for all students who register with the directory\* in the EOA region. (T-shirts, phone charger, gift cards, padfolios, etc). Note: This directory could be the EOA subgroup on the national alumni website or an EOA established directory.



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## **DONATIONS/GIVING: POSSIBILITY FOR IMMEDIATE IMPLEMENTATION**

### ⇒ **Student Conferences/Workshops**

- Send alumni request letters (see Appendix C) to help students to cover the costs for conferences, competitions, and other professional workshops. Identify a point person or committee members to disseminate information requests from programs about current student needs - stories and item requests. Any correspondence can be share on all online platforms and via letters.

### ⇒ **Donate Technology**

- Request alumni to donate usable and working technology that they may no longer in their organizations/institutions. These items could be useful for students who are trying to enroll in college or complete a college degree.

### ⇒ **In-kind Items**

- Request alumni to donate in-kind items such as web cameras, STEM kits, calculators, student guides, critical thinking board games. Create an Amazon wish list for alumni to purchase directly.

### ⇒ **Student Fees**

- Request alumni to assist students with student fees for college applications, tests, and graduation fees for graduate students.



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## **DONATIONS/GIVING: IMPLEMENTATION WITH STRATEGIC PLANNING**

### ⇒ **Career Days**

- Request alumni to donate their time for students to learn more about their careers and connect.

### ⇒ **Emergency Funds**

- Provide alumni with stories of current students who experience stress and who have basic needs to succeed. Send letters (**Appendix C**) with funding requests.

### ⇒ **Alumni Funded Scholarships**

- Set up alumni funded scholarship for pre-college, college, and returning adult learners. Send letters (Appendix C) with scholarship need ideas.



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### APPENDIX A: WELCOME LETTER

Dear TRIO Alumnus/a,

As President of the Education Opportunity Association (EOA), I want to congratulate you on becoming the newest member of the TRIO alumni community. TRIO is a large community with over [\[insert number of alumni\]](#) living alumni spread all over our region of Illinois, Indiana, Iowa, Kansas, Michigan, Missouri, Nebraska, Ohio, and Wisconsin.

TRIO has been your support system throughout your educational journey. Throughout this time, you have learned new skills that have set you on your future path. The future is unknown and can be daunting, but we hope you continue to build your network of TRIO support- specifically with EOA Alumni. Our EOA Alumni Committee offers opportunities for virtual and personal connections with your former cohorts and other alumni. By joining our EOA Alumni Directory, you will receive a wealth of resources and be able to utilize the experience of fellow TRIO alumni. We are here to help you stay connected through programs and events we sponsor and organize, including:

- Career networking
- Social events
- Fundraising
- Mentoring

Be sure to register to the EOA Alumni Directory. The directory makes it easy to connect with all TRIO alumni in the region and we hope you take advantage of the resource.

If you have suggestions for alumni events in your area or ways to improve communication, please let me know at [\[president email\]](#), contact [EOA Alumni Committee Chair at \[email\]](#), or send your ideas to any member of the EOA Alumni Committee.

In closing, let me again congratulate you on your accomplishments and welcome you to the TRIO Alumni family!

Sincerely,

[EOA President](#)



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APPENDIX B: SAMPLE FLYER



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ALUMNI EVENT

EVENT  
TITLE

00/00/0000 at 0:00 PM	EVENT LOCATION
	Additional details for event Specific attire Benefit (fundraiser, etc.)

REGISTER HERE: [WWW.XXXXXXXXXX](http://WWW.XXXXXXXXXX)  
QUESTIONS? NAME | EMAIL ADDRESS



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## APPENDIX C: SAMPLE LETTER DONATIONS/GIVING

Dear TRIO Alumnus/a,

We here at [\[Program Name\]](#) are so proud of our recent achievements with our program participants, and we would like to thank you for being a part of our TRIO Community. However, our mission continues to serve more students in need with support services, technology, funds for living accommodations, school supplies, and books. We need your help to continue our work.

As a federally funded program, though, we completely rely on community and alumni support to provide for our students in need. None of our efforts would be possible without the help of donors, volunteers, and supportive community members like you.

Would you please consider donating, perhaps, technology that you may no longer use? If you would like to make a gift, please visit our donation page here: [\[insert link\]](#)

We thank you for your efforts and support. With your help, many students will have an opportunities to achieve their dreams.

Sincerely,

[Your TRIO Family](#)



## APPENDIX D: SAMPLE EVALUATION AND ASSESSMENT

1. Throughout the program the administrators:
  - a. Distributed adequate information regarding my role and responsibilities
    - i. Strongly agree
    - ii. Agree
    - iii. Disagree
    - iv. Strongly Disagree
  - b. Provided an adequate timeline to fulfill my position
    - i. Strongly agree
    - ii. Agree
    - iii. Disagree
    - iv. Strongly Disagree
  - c. Communicate changes in a timely manner
    - i. Strongly agree
    - ii. Agree
    - iii. Disagree
    - iv. Strongly Disagree
  - d. Coordinated effective platforms for the program experience
    - i. Strongly agree
    - ii. Agree
    - iii. Disagree
    - iv. Strongly Disagree
2. What could have been done better?
3. What was done well?
4. From your vantage point, what are some disadvantages of the program?
5. From your vantage point, what are some advantages of the program?
6. What recommendations do you have for future program?
7. Share your most memorable experience from the program?
8. Testimonial (optional): Use this space to share how your involvement with the program has impacted you?



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## RESOURCES

Alumni Engagement Best Practices for Higher Education:

- <https://sproutsocial.com/insights/alumni-engagement-best-practices/>
- <https://pagely.com/blog/alumni-engagement-best-practices-higher-education/>
- <https://blog.alumniaccess.com/34-inexpensive-alumni-engagement-ideas>

National TRIO Alumni Association:

- <https://trio-alumni.hivebrite.com/>

Guide to Alumni Giving:

- <https://www.donorsearch.net/alumni-giving/>
- [https://journals.sagepub.com/doi/full/10.1177/0899764020977687?casa\\_token=uMfbM8EF-W8AAAAA%3A\\_4CVshN55yTKzdsc2PWPjLE5u8Y7OA7TBr5wcLxbQ8\\_SZTVgjCMoqMhw37Fh5PNk1DdgLOZDIQ](https://journals.sagepub.com/doi/full/10.1177/0899764020977687?casa_token=uMfbM8EF-W8AAAAA%3A_4CVshN55yTKzdsc2PWPjLE5u8Y7OA7TBr5wcLxbQ8_SZTVgjCMoqMhw37Fh5PNk1DdgLOZDIQ)