



THE OAKLAND SMALL SCHOOLS FOUNDATION'S

**ULTIMATE GUIDE TO
PLANNING A SUCCESSFUL
HOUSE PARTY OR SMALL
EVENT**

SCHOOL EDITION

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FUNDRAISING EVENT: PLANNING CHECKLIST

Two Months Prior to House Party:

- Determine financial goals and campaign angle.
- Acquire host's contact list and add to invite list.
 - Guest list should mostly include new targets (people we can introduce to school). Do not invite a lot of people who already know and love your school – they already donate and don't need convincing.
- Confirm "ringer" (similar to sponsor who is a donor and will publicly encourage guests to give).
- Acquire ringer's contact list and add to invite list.
- Establish date for the event.
- Work with host about responsibilities (if house party or host at a venue).
- Prepare a preliminary agenda and guest list.
- Determine venue and confirm availability.
- Conduct site visit to venue, if required.
- Create committee from school and development team / divide responsibilities.
- Create calendar with mini-deadlines to ensure progress.
- Establish budget for the event (if house party, host provides).
- Determine food and beverage needs (if house party, host provides).
- Determine audio-visual needs and order them if needed.
- Draft PowerPoint presentation or create colorful visual display (if applicable).
- Invite and confirm speakers – principal, parent, teacher, and student.
- Create event contact list (internal).

Four to Three Weeks Prior to Party:

- Send out invitations with RSVP – Evite.com, Vertical Response Email, Postcard or invitation card (if you want to do a paper invitation ask OSSF for the invitation template).
 - In invite, stress that we are catering and need an accurate headcount to add some guilt / obligation so more RSVPs actually show up day of event.
 - If parking is difficult, include parking tips.
- Finalize agenda (internal and public) and create program.
- Confirm speakers (ringer, principal, parent, student, teacher).
- Finalize materials list.
- Compile RSVP list.
- Determine seating / furniture needs and acquire.
- Finalize food and beverage plans and order from caterer (if necessary).
- Review and update event budget (if house party, host provides).
- Communicate event information to speakers and acquire bios (if necessary).
- Divide up responsibilities at the event.
- Create event evaluation form (optional).
- Finalize PowerPoint presentation or create colorful descriptive board of information.

Week of the Event:

- Confirm food order (if house party, host provides).
- Acquire utensils, plates, napkins, etc. (if house party, host provides).
- Make copies of all materials / handouts.
- Confirm agenda and make changes as needed.
- Re-confirm event responsibilities with committee.
- Prepare sign in sheets, nametags, and signage as needed.
 - For bar parties, etc. have signage that says "Cover - \$x" prepared and displayed.
- Create checklist of day-of items and responsibilities.
- Create talking points for staff (both OSSF and school) and host.
 - Info about school and goals / performance.
 - About OSSF and what OSSF does / offers.
- Coach principals on dealing with teachers: remind them that they are representing the school and are at an event not to drink / socialize with themselves but to help the school raise money.
- Create flowchart of event agenda, including back-up plans.
- Update event contact list. Distribute to team – request the house party host's contact list to remind people of event.
 - Make reminder phone calls to confirm RSVPs.
 - Send out a reminder VR email.
 - Make sure enough targets are going to attend – if not, consider canceling event.
- Test all audio-visual equipment (when applicable).
- Acquire / make donations box.
- Practice presentations.
- Contact local media (when applicable).

Immediately Following the Event:

- Pack all materials and clean up.
- De-brief with team (fundraising results, evaluation data results).

FUNDRAISING EVENT: MATERIALS LIST

Event Logistics:

- Signage
- Sign-in sheet
- School marketing (brochures, newsletter, banners, fact sheets, tee shirts)
- Principal business cards
- Cover or suggested donation signs for sign-in table and door
- Nametags
- Table tents
- Parking passes
- Envelope with petty cash
- Envelope for event receipts/ invoices
- Event contact list
- Masking tape
- Markers
- Stapler with extra staples
- Audio-visual equipment (laptop, projector, microphone, speakers)
- Balloons to mark house

Audience Materials:

- Agenda
- Event packet
- Writing instruments
- Donor cards
- Remit envelopes
- Donations box
- Name tags (optional)

Food and Beverages: (Note: at a house party, host is responsible for)

- Food
- Beverages
- Napkins
- Cups
- Plates
- Utensils
- Serving utensils
- Knives
- Paper towels
- Clean up spray
- Garbage bags
- Table tents for identifying food
- Coffee condiments (tea, sugar, creamer, stirrers)
- Food condiments (salt, pepper, peppers, mayo, mustard)
- Tablecloths
- Mints
- Water



GUEST LIST

List emphasizes TARGETS (potential donors and new people introduced to School)

School: _____

Event: _____

Date: _____

NAME	Phone Number / Email	CONTACT Who knows this person?	STATUS Has been contacted? When?	RESPONSE From the target	GIFT Potential

EVENT SCHEDULE

2 Hour Event:

- First 30 minutes – mingle, hors' d'oeuvres, acquire critical mass.
- Host addresses crowd, gives background on event: 5 minutes.
- Principal speaks – gives background of school, introduces parent – 5 min (no talk of money).
- Parent and/or student speaks – highlight why they send their kid to the school or why they like their school. Mention specific projects and activities, introduces teacher – 5 min (no talk of money).
- Teacher or Vice Principal speaks – talk about why they choose to work at the school and mention specific projects or initiatives they like that use extra funding – 5 min (no direct talk of money).
- Host makes pitch for funds – speaks about his/her love of the school and the amount he/she is giving. States event's fundraising goal and total campaign goal. Challenges friends for matches. If there is a ringer in the group, they make a donation and encourage others to also do so.

*Note: Turn off audio-visual screens when people are speaking or re-position speakers as it is hard to see people when they are backlit.

STORY AND PITCH

(The following points should be covered by the speakers)

Basic Information about the School: (Presented by the Principal)

- School Name: _____
- Number of years school has been in operation: _____
- Number of students: _____
- Grades: _____
- Demographics of students: _____
- Neighborhood school is located in: _____

Parent Talking Points:

- Why do you like the school?
- Why did you send your kids to the school?
- Why do you stay at this school?

Student Talking Points:

- Why do you like the school?
- What is your favorite part of school (i.e. class, subject, special project or activity)?

School Talking Points: (Presented by a teacher and/or principal)

- School theme and innovative style.
- What inspired school's creation?
- Goals for school.

OSSF Talking Points:

- Assists the school in operations, fundraising, and acquiring and managing resources.
- Safe vehicle for donations to be processed.
- Donations are tax deductible because OSSF is a 501c3.
- Pays school's bills from the school's fund and manages school's accounts.
- Assists with numerous other things to help the school be efficient.

Project Talking Points: (Presented by event host and/or principal)

- Describe project and benefit to students: _____
- Outline cost of the project: _____
- State fundraising goal for the year: _____
- State fundraising goal for this event: _____

Pitch: (Presented by event host and/or principal)

Speaks about his/her love of the school and explicitly makes a donation. States event's fundraising goal and total campaign goal. Challenges friends for matches. If there is a ringer in the group, they make a donation and encourage others to do the same.



GUEST LIST – FOLLOW UP

List emphasizes TARGETS (potential donors and new people introduced to School)

School: _____

Event: _____

Date: _____

NAME	Phone Number / Email	CONTACT Who knows this person?	ATTENDED?	GAVE?	POTENTIAL to host future HP or sponsor Giving Circle?	CONTACTED by whom and results	NEXT STEPS

EVENT FOLLOW UP

- Perform post-event budget review.
- Prepare and deliver follow-ups (thank yous, meeting notes, etc.).
 - Thank you to host.
 - Love note (OSSF personalized postcard) to big donors.
 - Salesforce generated thank you to all donors within 30 days.
- Inform host of any checks or online donations received from people on their invite list.
 - Have host (or OSSF) follow up with no-shows to check-in and see if can schedule a school site visit or still persuade them to donate.
- Collect the sign-in sheet.
 - Enter people in attendance into school's Salesforce database.
 - Keep sign-in sheets in office for a while to track any donations that come in later (to see if they are from people that attended the event).