



THE OAKLAND SMALL SCHOOLS FOUNDATION'S

**ULTIMATE GUIDE TO  
PLANNING A SUCCESSFUL  
SITE VISIT**

SCHOOL EDITION

## FUNDRAISING EVENT: PLANNING CHECKLIST

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### **Two Months Prior to Site Visit:**

- Determine financial and community-building goals and campaign angle.
- Decide who to invite.
  - 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.
- Establish date for the site visit.
- Prepare a preliminary agenda and guest list.
- Create committee from school and development team and divide responsibilities.
- Create calendar with mini-deadlines to ensure progress.
- Determine food and beverage needs (i.e. bagels and coffee for morning visit).
- 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, phone call, 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.
  - Include driving directions to the school.
- Finalize agenda (internal and public) and create program (should include speaking program, classroom tour information, and any food logistics).
- Confirm speakers (ringer, principal, parent, student, teacher).
- Finalize materials list.
- Compile RSVP list.
- Finalize food and beverage plans and order from caterer (if necessary).
- Divide up responsibilities at the site visit.
- Create event evaluation form (optional).
- Create colorful descriptive board of information about the school (optional).

**Week of the Event:**

- Confirm food order.
- Acquire utensils, plates, napkins, etc.
- Make copies of all materials / handouts.
- Confirm agenda and make changes as needed.
  - Make sure classrooms you plan to visit will be doing activities and not taking tests. If taking a test, change class.
- Re-confirm event responsibilities with committee.
- Prepare sign in sheets, nametags, and signage as needed.
- 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.
- Update event contact list. Distribute to team and make confirmation calls.
  - Make sure enough targets are going to attend – if not, consider canceling or rescheduling site visit.
- Test all audio-visual equipment (when applicable).
- Make sure student work is displayed in school hallways and classrooms.
- Practice presentations.

**Immediately Following the Event:**

- Pack all materials and clean up.
- De-brief with team (potential partnerships brokered? Potential big donors to continue fostering relationships with?).



## FUNDRAISING EVENT: MATERIALS LIST

### **Event Logistics:**

- Signage
- Sign-in sheet
- School marketing (brochures, newsletter, banners, fact sheets, tee shirts)
- Principal business cards
- Nametags
- Event contact list
- Audio-visual equipment (laptop, projector, microphone, speakers)

### **Audience Materials:**

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

**Food and Beverages:**

- Food
- Beverages
- Napkins
- Cups
- Plates
- Utensils
- Serving utensils
- Knives
- Paper towels
- Clean up spray
- Garbage bags
- 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, have food set out, wait for everybody to arrive.
- 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).
- Break up into groups (if needed) and visit a couple of classrooms. Point out school landmarks on the tour and introduce attendees to teachers and students.
- Principal makes pitch for funds – speaks about his / her love of the school and their needs and goals for the school. States total campaign goal. Thanks attendees for coming and requests their support in the coming months and years.

\*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 states total campaign fundraising goal.  
Talks about the current challenges the school faces and requests assistance.



## 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

- Divide up attendees among Principal, Development Team members, and/or OSSF staff to do individual giving campaign follow-up and nurturing.
- Prepare and deliver follow-ups (thank yous, meeting notes, etc.).
  - 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).