



SCHOLARSHIPS FOR EDUCATION CHOICE

at SAGAMORE INSTITUTE

Fundraising Toolkit Guide

Small Donor Event (20 or under)

Purpose: To invite potential donors to hear about the opportunity in a setting that encourages dialogue and interaction.

Types of events: Be creative, and design an event that fits the style of your community. You don't need to spend a lot of money to have a successful small gathering; providing refreshments can be simple (coffee and donuts) or more elaborate.

Here are some ideas to consider:

- Breakfast or coffee before school/work at the school
- Learning session (breakfast or lunch) hosted at a financial advisor's office – the firm's staff can then be invited to learn more about the program.
- Breakfast or lunch hosted at the school or Sagamore's headquarters in Indianapolis
- Gathering at the school in conjunction with an activity that is already scheduled (grandparent's day, concert, etc.)
- Evening event (dinner, dessert, or wine/cheese reception) at the school, in a home, or at Sagamore's headquarters in Indianapolis (see "Parents Take the Lead" to learn how one school is implementing this)
- Any of these options could be held live, outdoors, or virtually.

Invitation timeline: If you would like someone from Sagamore Institute to attend/present, please contact us as early as possible in your event planning process so that we can get it on our calendar. NOTE: It is important to get RSVPs and confirmations on attendance at your event so that you will be prepared.

WHO TO INVITE:

- Anyone that you have identified as a potential donor to this program (board members, steering committees, volunteers, alumni, grandparents, business owners with a connection to the school).
- Although parents of current students may be potential donors, parents of students who receive the SGO scholarship are not a primary audience.
- Financial services professionals (tax preparers, accountants, financial advisors, wealth planners, etc.) with a connection to your school are great to have in your audience.
- Also include (if possible) at least one current donor who is willing to share their experience.

One month before event:

- Send invites to those you want to attend. You can use electronic invites (e-vite, mailchimp, etc.), email invitations, and/or paper invitations. Older audiences may respond better to a written invitation or an email followed by a phone call. See samples in toolkit.
- If you are inviting a previous donor, follow up with a phone call or email to ask if they would be willing to share a little about their donation experience at the event (what motivated them to give, the ease of giving, the receipting and claiming the tax credit).
- Considering adding a blurb in the school newsletter.

Two weeks before event:

- To those who have not responded, repeat the invitation with a phone call (it may take 2-3 invites before a commitment is received).
- To those who have responded, send a reminder that the event is coming up in two weeks.

One week before event:

- To those who have not responded, extend a “last chance” invitation via email or with a phone call (it may take 2-3 invites before a commitment is received).
- To those who have responded, send a reminder that the event is coming up in one week.

One day before event:

- Send a final reminder including time and location to everyone who has committed to attending. If you will be serving food, let them know that as well (for example: coffee and donuts will be available or lunch will be served at noon)

TOOLKIT CONTENTS:

- Sample Email Invites
- Sample Mail Invites
- Sample Bulletin/Newsletter Invites
- Donor Tri-Fold (customize to be school specific)
- Donor Event Presentation Power Point (be sure to customize the slides with your school name and information)

<http://www.scholarshipsforeducationchoice.com/forms/small-donor-event-toolkit/>

Format: You will want to design your format to encourage conversation, interaction and questions. Keep this in mind when determining your space needs (for example, round tables will encourage more interaction than chairs in a row). Keep the timeline limited and be sure that you honor the participants by starting and ending on time! Be sure to have copies of your donation material (our donor tri-fold with your school logo at a minimum, plus the tri-fold designed for participating families in case there are parents present).

Whatever format you use, be sure to take time toward the beginning and again at the end to explain

to the audience the unique value that your school provides. If you have a short video promoting the school, consider showing the video. You might also have a teacher or parent talk briefly about what the school means to them. Remember that while the SGO program is a great tool to help donors, their primary motivation for giving is to support your school.

PHONE 317.472.2052

EMAIL scholarships@sagamoreinstitute.org

WEB scholarshipsforeducationchoice.com

SCHOLARSHIPS FOR EDUCATION CHOICE
IS A PROGRAM OF SAGAMORE INSTITUTE

Format Option 1 - Panel Discussion: Include a current donor, financial services professional, someone from the school, and/or someone from Sagamore Institute (see sample in the toolkit).

- **Introductions** - the school representative introduces the panel and their role
- **Questions for Panelists** - have each panelist answer or allow the discussion to progress based on the answers. Select from the following potential questions:
 - What are the benefits of giving through the Tax Credit Scholarship Program? (each panelist will likely share a different perspective).
 - For donor representative, what inspired you to give through this program?
 - For donor representative, tell us about how you became familiar with the Indiana Tax Credit Scholarship Program.
 - For Sagamore representative; once Sagamore receives a gift, what communications can the donor expect from you, specifically regarding the tax credit? How does Sagamore award the scholarship money? What students qualify as recipients?
 - For Sagamore representative, what is the range in size of the gifts you receive? Who can give through this program?
 - What are the main points you'd like for attendees to take away from this discussion today?
 - To the Audience - what benefits do you see to giving to the program? What are your questions?

ACTIVITY OPTION

We want to be careful to engage our donors with our schools in ways that extend beyond their wallets. Consider asking your guests to write a simple note of encouragement to students or teachers, perhaps linked to an upcoming event (standardized test, graduation, etc.). Just provide notecards, something to write with, and perhaps an example or two. Encourage your guests to be creative and have fun! Make sure you invite them to attend upcoming school events or arrange a special tour for those interested in seeing the school.

Format Option 2 - Power Point Presentation: See the Power Point in the toolkit. Be sure to adjust the first slide to include your school name - you can customize throughout with school logo and information. Print out the presentation and include the slide notes. Here are the slide titles and a brief explanation:

Slide 1: Welcome - someone from the school welcomes those who have come and gives an overview on how the school is making a difference in the lives of the students.

Slide 4, 5: Tax Credit - explain the tax credit - use the note provided in the notes section

Slide 6: Federal Deduction - provide an overview of how the federal deduction works

Slide 7: Ways to Give - explain and direct donors to either your own site for an online giving option or SEC's site. Ask us about setting up text-to-give before your event!

Slide 8: Students & Households – shows the eligibility requirements and the income limits. Starting in the 2026/27 school year, there will be no income eligibility requirements.

Slide 9, 10: Gift Impact – feel free to exchange the data points with your school specific data points. Ask SEC for those numbers. You may decide to use only one of these slides, or you can use both. You can also customize with quotes from your own parents.

Slide 11: Call to Action – encourage people to give to see how the process works, and to ask questions so that they are equipped to share it with others.

Q/A Time – encourage those attending to ask questions about the program, school, etc. (It is nice to encourage those you know ahead of time to ask questions during this time so that others will be comfortable doing so). If you are unsure of the answer to the question let the person know that either you or someone from Sagamore can get back to them (be sure to retain their contact info and follow up).

The “ASK” – either the Sagamore person or someone from the school asks those in attendance to participate by donating. Make sure that you have plenty of donation forms on hand.

PARENTS TAKE THE LEAD

One great example of implementing a small donor event comes from Clay and Paula Purswell. Their sons attend Fortune Academy and they took the initiative to open their home and invite some people to hear about the opportunity to support families and students by donating through the SGO. They worked with the school to get invitations out, secured a speaker from SEC, put together some refreshments (wine, cheese, nuts, soft drinks, etc.) and opened their home. That initial event led to five more events during the 2018-19 school year; each event included an invitation not just to give but also to host. The Purswells made it easy for others to host by helping to provide the refreshments at each event.

The format used was like Format Option 2 above. Before the SGO presentation (using PPT), someone from the school talked about the distinctives of Fortune Academy. After the SGO presentation, someone from the school gave examples (without names) of families/students who have been impacted by SGO scholarships in the past and communicated the need for this year. The Purswells also spoke at each event, communicating what drew them to the school, and conveying their passion for making sure that children who need this unique environment have access to it. The donations didn't follow every event and they didn't come in all at once. But by the end of the year, the school saw SGO donations triple over the previous calendar year, and they secured a significant number of new donors.

Do you have someone who can advocate for your school in this way? The message is powerful coming from parents who can say “this school made a difference for my child.”

Format Option 3 – Donor Brochure Walk through: Here is a suggested agenda (see tri-fold brochure in the toolkit – be sure to use one that has been formatted for your school with the name of the school prefilled and the logo of the school on the front cover. SEC can do this for you or you can add it yourself):

Welcome – someone from the school welcomes those who have come and gives an overview on how the school is making a difference in the lives of the students.

SGO Program Overview – someone from Sagamore Institute or the school introduces the SGO program, talks about the value of this tool for the school, and explains how the program works (using the donor brochure as a guide). Here are the basic points to make as you walk through the brochure together.

- If you care about school choice, this is a great way to use tax dollars to impact school choice. Almost the full amount of the donation will fund students at x school.
- Donors receive a state tax credit worth 50% of the value of the donation and (if they itemize) a federal deduction on 50% of the value of the donation.
- Reiterate that we all pay state taxes. If you are employed, you are likely getting those taxes taken automatically from your paycheck at around 3%. Someone earning \$50,000 likely has about \$1500 in tax liability that can be eliminated by donating to this program.
- Explain that there are three ways to give – check made out to Sagamore, donating online, or non-cash assets (stocks and securities).
- Walk through the FAQs on the brochure
 - Sagamore Institute is an Indianapolis based public policy research organization that cares about education excellence.
 - No limit on how much one individual or corporation can give; unused credits can be carried forward for 9 subsequent years. There is a limit on the amount of credits available statewide and they do run out. Check the Home page on the SEC website to Check Remaining Credits
 - Income eligible Pre-K-12 Indiana students can receive the scholarships.
 - Donors cannot designate their funds to go to a particular student.

A SAMPLE “ASK”

Do not hesitate to ask boldly! You believe in what your school is doing, and you want more students to be able to attend – you can ask simply, boldly and clearly. Here are a few sample lines to try:

- Would you donate now to provide scholarships for students to attend INSERT SCHOOL NAME?

- You can provide scholarships for students to attend; here’s how you can donate now. (Explain the ways – check with donor form, online, text, or stock).

Tweak and practice one that you like so that it is clear and concise.

Q/A Time – encourage those attending to ask questions about the program, school, etc. (It is nice to encourage those you know ahead of time to ask questions during this time so that others will be comfortable doing so). If you are unsure of the answer to the question let the person know that either you or someone from Sagamore can get back to them (be sure to retain their contact info and follow up).

The “ASK” – either the Sagamore person or someone from the school asks those in attendance to participate by donating. Make sure that you have plenty of donation forms on hand.

Thank and dismiss

Follow up: It will be very important to follow up within a couple of days with those who attend, to thank the givers and to see if others have questions/feedback. We suggest either personal notes, phone calls, or both. All who give will receive a receipt letter from Sagamore Institute, but this does not replace the expression of gratitude from the school.