



Open House Planning Guide

Resources and tips for effective
youth program site visits

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Open House Overview

Open houses give program stakeholders (like current & potential funders, current & potential board members, along with school and community partners) an opportunity to observe your program in action, meet your leadership, staff and participants, and learn more about your organization and your mission.

The information these individuals acquire at the open house, and the experience they have, will impact their funding and partnering decisions, so it is important for your guests to see a well-run, engaging, effective program with quality youth engagement.

It is also important for all staff interacting with the guests to be knowledgeable about your programs and prepared to answer questions. Your fundraising/philanthropy team members (aka development) and program leadership must coordinate closely to be as prepared as possible.

This guide will help prepare your team to confidently run an effective open house or site visit.

Open House or Site Visit?

Site visits and open houses are similar in format, with some key differences. Site visits are smaller and are held for a more strategic, targeted list of invitees. They are often the format that should be pursued for small groups of key, high-level funders or stakeholders who already know your program. Open houses are more general, and designed to raise awareness of your program. These events can be more broadly publicized within your local network - consider including elected officials, community influencers, school/district representatives, etc.

Generally speaking, your open house or site visit should:

- Take place at an active program site
- Last for about 1 to 1.5 hours
- Include an introduction, site tour, and wrap-up with time for Q&A

3 Keys to a Successful Open House

Let's take a look at the three key components of an open house, the introduction, site tour, and conclusion:

1. The Introduction

The appropriate program staff member (usually an executive or development team member) welcomes guests and gives a brief overview of your program goals before introducing other leadership staff. Site leadership will then provide an overview of a typical day for participating youth at the site, highlighting key program components (i.e. academics, STEM, life skills, field trips, etc.) and discuss the relationship with the school partner.

2. Behind the Scenes

Site leaders, development staff, organization leadership, and/or other staff lead tours of about 3-7 guests. If possible, divide guests according to interest and possible "hooks" and assign tour guides accordingly.

Tours should include several rooms of varied ages and activities. Tour leaders should do a brief introduction before each room to introduce the class being visited, explain what they are currently working on, and give background on the staff member who is teaching. Assuming the youth have been prepped beforehand, guests should be encouraged to interact with the participants.

All open house staff should be prepared to answer questions about the program. A list of FAQ's and answers can be helpful to prepare (reference the fact sheet questions to get started)- you should not assume



Arly Tip:

Highlight areas of interest to each particular group.

For example, if two tour guides are visiting the same room, the first tour guide may point out the curriculum to school district personnel and the next tour guide may spotlight the free snack/meal the children are eating to funders.

that anyone in any role knows the key information about your program that you want conveyed during the visit.

Be sure to explain to your team that these groups are NOT evaluating them, or their kids, they are there to learn more about the program and to support them!

3. The Wrap-Up

Guests return to the original meeting space for refreshments, Q&A, and reflection. Use this time to leave your guests with memorable highlights and important messages!



Arly Tip:

We've found great success in assigning a youth ambassador in each classroom on the tour. The youth ambassador is tasked with coming to the door to greet the group, introducing themselves and the activity currently underway, and answering any questions. Tour leaders may engage the youth ambassador in at least one classroom with questions.



Planning Timeline

As you prepare your open house timeline, here are a few points to keep in mind:

- While the timeline should be followed when possible, actual planning time will probably vary greatly—it might take several days and meetings, or just one or two planning meetings.
- Many of these tasks will be subject to additional activities (i.e. the finalization of program start dates and site leadership) which may not follow this timeline exactly, though this can still serve as a useful checklist.
- We have created an editable **Site Visit Checklist** that mimics the information below for you to use for your own planning purposes.

Stage 1: Set the Date

8 weeks before

TASK	OWNER	NOTES / TIPS
Begin to identify potential invitees	Development & site leadership	It is helpful to create this high-level list and then drill down into specifics from there
Work with site leadership and other organization staff to determine the best dates & times for a visit Note: This will likely be an ongoing process, subject to visit leader availability, and the goals for the invitees	Development (In coordination with leadership)	Mondays & Fridays, along with field trip days, are not ideal Don't schedule during first & last week of the program, or during testing periods. Ensure the site offers specifics your proposed guests are interested in (i.e. STEM, arts, etc)
Coordinate with staff to confirm desired date & time for open house	Site leadership	

Stage 2: Confirm Visit Details & Send Invitations

4-5 weeks before

TASK	OWNER	NOTES / TIPS
Create guest list	Development & site leadership	Using the high-level list you drafted in stage 1, list out specific invitees with contact information and areas of interest
Send invitations 3 weeks in advance; plan to send 1-2 reminders (to those who haven't responded) and a reminder the night before to those who have RSVP'd	Development (In coordination with leadership)	Coordinate with other staff to ensure the appropriate contact invites each guest
Reserve a meeting space for guests & staff to meet, greet, discuss the program(s), and participate in Q&A	Site leadership	This should be a quiet space where refreshments can be served
Identify & prepare site staff for visit	Site leadership	<p>Communicate to teachers/staff when guests will be stopping by their classroom</p> <p>Make your team aware of any attire expectations (i.e. all wearing program t-shirts)</p> <p>Collaborate on identifying Youth Ambassadors</p>
Ensure a welcoming and content-rich environment	Site leadership	<p>Post youth artwork/projects on the walls/ display, any themes/slogans, etc.</p> <p>Consider having kids create artwork and/or poster boards to welcome guests (and potentially help create thank yous!)</p>

TASK	OWNER	NOTES / TIPS
Identify classrooms for visit with a range of grades & activities that will give a good impression of the program	Site leadership	Gain input from development as needed
Prepare 'ambassador' youth	Site leadership	<p>The youth ambassador is tasked with coming to the door to greet the group, introducing themselves and the activity currently underway, and answering any questions</p> <p>At least one classroom should have prepared children who can interact with the visitors</p>
Obtain security clearance with school/site if needed	Site leadership	

Stage 3: Collateral & Document Creation

2-3 weeks before

TASK	OWNER	NOTES / TIPS
Begin to create visit agenda	Development & site leadership	See below for a schedule example
Relay classroom information to development staff (class numbers, subjects to observe, etc.) to ensure alignment with development's objectives	Site leadership	Compile any helpful documents like calendars, daily schedules, enrichments, field trips, etc

TASK	OWNER	NOTES / TIPS
Assign visit roles for program staff	All pertinent staff	Who will welcome guests, who will lead the tour, who will serve as spokesperson, etc
Create a fact sheet on site if desired	Development & site leadership	Useful to ensure all pertinent staff are prepared to answer questions from guests Check out our free briefing document template
Select takeaway collateral for guests	Development	Curate a program overview document with input from development and site leadership—include bios of staff & key leadership, maybe also fast facts about school like youth served etc. Previous summer/program impact data, sample curricula, brochures
Send a reminder invitation (or two!) to guests who haven't RSVP'd	Site leadership	Actively review the guest list throughout the planning process—if there are not enough confirmed attendees, then it may be better to reschedule
Obtain security clearance with school/site if needed	Site leadership	

Stage 4: Final Meeting Before the Visit

1 week before

TASK	OWNER	NOTES / TIPS
Provide guests with final logistic details for the event as well as an external agenda, if desired (1-2 days before)	Development & site leadership	Discuss entry, directions, parking, and restrooms Make sure to consider factors like construction etc. going on at site
Finalize agenda	Development & site leadership	What specific lessons will be taking place that day? Get as much info on site goings-on for the day as you can in advance
Finalize staff roles	Development & site leadership	
Determine photography needs	Development & site leadership	Consider having a few team members prepared to capture photos throughout the visit, including: <ul style="list-style-type: none"> • Group photo of attendees • Interaction of attendees and youth/ staff • Artwork, etc that was created specifically for the event
Review speaking points, FAQ's	Development & site leadership	Hand out briefing document to internal team members assisting with the visit
Confirm meeting space	Development & site leadership	Make accommodations for guests' comfort— for example, many sites don't have AC, so consider fans, understand/plan for any mobility concerns, etc.
Assign responsibility for preparing reception room; discuss desired lay out	Development & site leadership	

TASK	OWNER	NOTES / TIPS
Assign responsibility for refreshments	Development & site leadership	When purchasing, keep it light! Stakeholders don't want to see tons of money spent on their entertainment (juice, muffins, and coffee work well)
Determine signage & assign responsibility for printing and posting	Development & site leadership	
Remind staff about open house/ site visit	Site Leadership	Highlight any expectations (attire, FAQ prep, greeting expectations, reminder of which rooms will be visited and when, etc)
Collect all other materials	Development	Name tags, pens, tape, collateral, business cards, site maps, etc.

Stage 5: Day of the Event

TASK	OWNER	NOTES / TIPS
Wear program t-shirts/ polos and name-tags	All staff	Discuss school entry, directions, parking, and restrooms Make sure to consider factors like construction etc. going on at site
Set up a meeting space with chairs, refreshments, and collateral	Whoever assigned	Refer to your agenda for details
Post signage (arrive early to do this)	Whoever assigned	Refer to your agenda for details
Finalize staff roles	Whoever assigned	Refer to your agenda for details

Stage 6: Event Follow Up

Within 1 week after

TASK	OWNER	NOTES / TIPS
Send thank you notes to attendees	Site leadership	<p>For a personal touch consider adding a picture or two from the day, or artwork from a participant in the program!</p> <p>Be sure to follow-up with any information or materials guests requested</p>
Send a thank you to school/site management	Site leadership	Refer to your agenda for details
Share thank you's and gratitude with staff and youth for welcoming guests	Site leadership	
Evaluate visit with team	Site leadership	Take the time to meet with your team to hear how they felt the visit went! Were they impressed, how did the room visits go, did they highlight anything that received special feedback, what types of questions were asked, etc. Take notes so you can incorporate into your next open house

Best Practices: Do's

- **Communicate, communicate, communicate**
 - Have prep meetings/phone calls.
 - Ensure all staff (development, program coordinators, site leaders) understand the purpose of open houses and what their roles will be.
 - Provide site staff with an overview of the open house planning process before planning begins.
 - Explain to staff that these visitors are NOT evaluating them, or their students, they are there to learn more about the program and to provide support!
- **Begin the planning process as early as possible**, given the constraints and timing of the program planning overall
- **Actively review RSVP lists throughout the planning process**
 - If you have a small number, consider rescheduling or shifting to smaller group or 1:1 site visit format.
 - Not everyone who RSVP's will attend, so if you are hoping to have 10 attendees, you want to have 12-14 RSVP's.
- **Research your stakeholders** & relay that information to all pertinent staff
- **Engage the kids in your program**
 - Have ambassadors in classrooms.
 - Consider a youth leader for a tour.
 - Come prepared with questions to facilitate visitor & youth interaction.
- **Ensure the appropriate organizational staff member invites guests** (i.e. if someone has an existing relationship with a guest, have them extend invite).
- **Ensure the appropriate organizational contact is present** and helps to lead the tour.
- **Anticipate problems**, and have contingency plans.
- **Let site staff know how the visit went afterwards** (and give them the opportunity to share their feedback: it takes the whole team!).

Best Practices: Don'ts

- **Don't schedule open houses the first or last week of your program**, and avoid Mondays and Fridays/ field trip days. Sometimes programs see an attendance dip around the July 4 holiday, so you may wish to avoid that week as well.
- **Don't assume responsibilities are understood.**
- **The 'owner' column on the checklist has suggestions**, not set assignments, based on who is likely best suited to take care of a certain task. For every task, ensure responsibility is discussed and assigned—not assumed.
- **Don't use jargon**, such as acronyms like OST, ELL, etc., and don't simply refer to 'months gained' without an explanation. Assume your guests may not know what you are discussing. Explain the program aspects the way you would to a stranger.
- **Don't forget the logistics**
 - Discuss school entry, directions, parking, and restrooms.
 - Ask about special circumstances at site (for example, is there construction which impacts parking and entry?)
- **Don't include unnecessary individuals on the visit.**
- **Don't make promises** to stakeholders that site leaders may not be able to deliver on.
- **Don't make unplanned visits or stops.**
- **Don't share every aspect of the program** - highlight key information your guests would be interested in learning about and keep it to pertinent information only.
- **Don't over-schedule sites** - though geographic and timing constraints are a challenge, site visits and open houses should not interfere with the participants' ability to receive the program benefits.

Open House Agenda Example

Open House Schedule: 9:00 am - 10:00 am

- 8:30 - 8:45 **Program staff set-up** meeting room and wait in lobby for guests
- 8:45 - 9:00 **Guests arrive**, staff welcome them in lobby and lead to meeting space
- 9:00 - 9:15 **Welcome & introductions** with light refreshments
- **Development:** (5 minutes)
 - Welcome guests - thank for coming, outline schedule for the day
 - Share your purpose - provide an overview of the problem your program is designed to address
 - **Program coordinator** or appropriate leadership: (10 minutes)
 - Brief description of district relationship & history (if applicable)
 - Explain the program model
 - Explain the program site setup
 - Share what makes your program different
 - Any relevant school information
 - Highlight special initiatives (enrichments: what they are & why they were chosen, special events, curriculum, field trips, etc)
 - **Transition to classroom tours**
- 9:15 - 9:45 **Classroom tours** (30-40 minutes)
- Break groups up into several tours
 - Outside each classroom, explain: grade level, teacher's role at school; what they're studying; how it's different from the last classroom visited; things to look out for (specific teaching skills; teacher/ tutor relationship; kids with IEPs/ special ed; specific improvements made through the program or anecdotes)
 - One classroom should include an opportunity to hear participants speak / read

- If it does not interrupt the classroom activity, introduce visitors to participants
- Conclude class visits and lead back to meeting room

9:45 - 10:00

Conclusion

- Program coordinator, site manager, and development available to answer questions
- Depending on the audience, consider asking guests to write and share a reflection from their visit (record these on heart-shaped papers and post at the staff room for staff to see what resonated)
- Thank everyone for coming

Potential Questions & Fact Sheet

Ensure all of your tour leaders feel confident and prepared to answer questions about the site. Below are some thought questions to get started. Once completed, put this information into your **briefing document** and share with your leadership and team members.

- How long has this program been offered by the organization?
- How long has the organization been working with the school/partner?
- What are the goals of the program? What outcomes do you track? Do you have data to share from previous years?
- How many youth, and what grades, are served in this organization?
- How many youth, and what grades, are served at this site?
- Are there any special initiatives at this site? How do these meet the community's needs?
- What subjects will the visitors be observing during the tour?
- What are the relevant demographics of the site (i.e., a high English second language (ESL) population) and how does this impact the program?



Engaging Participants



Tips for the kids in your program:

Here is a way you might introduce the children to your visitors.
“We have some visitors in the class today: they want to learn a little bit about our program.”

Check out the following prompts for ideas to help support kids in sharing their thoughts:

- Can someone tell me what you’re learning about in class today?
- What is your favorite part of our program?
- How is this program different from the school year?
- (If applicable) Did you go on any trips? What were your favorite?
- (If applicable) These people work for foundations: they help make sure you can go on those field trips and keep coming to the summer program!
- Can anyone tell me what you want to be when you grow up?
- Do you have any questions for our visitors? About their jobs?

Open House Invitation Example





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