



# YOUR SAGE SOCIAL TOOLKIT

---

Thank you for hosting a SAGE Social! This toolkit includes the following items to help you prepare for your event: a planning checklist, sample invitation, sample agenda, and a volunteer time record. By tracking your volunteer hours, you help us communicate to our funders and the broader community the value of your service to SAGE.

## [Planning Checklist](#)



## [Sample Invitation](#)



## [Sample Agenda](#)



## [Volunteer Record](#)



For your reference, the last page of this toolkit includes a copy of the questionnaire that we distribute to guests at the end of the Social.

If you have any questions, please do not hesitate to contact Steve Higgs at 971-717-6570 or [shiggs@wearesage.org](mailto:shiggs@wearesage.org). You may also review our *SAGE Socials Questions and Answers* sheet if you have basic questions about hosting a Social.

**We are excited to work with you!**

## Suggested Planning Checklist to Host SAGE Social

### **3 to 4 WEEKS BEFORE SOCIAL:**

- \_\_\_\_\_ Set the date with SAGE (contact Steve at (971) 717-6570 or [shiggs@wearesage.org](mailto:shiggs@wearesage.org))
- \_\_\_\_\_ Draft your invite list – the rule of thumb is to invite two times as many people as you would like to attend (aim for 10-15 attending, as space allows)
- \_\_\_\_\_ Draft and send your invitation (see enclosed sample). If finding your house is confusing, include a map and your phone number
- \_\_\_\_\_ Record your time on the volunteer record (continue to do so until your Social)



### **2 WEEKS BEFORE SOCIAL:**

- \_\_\_\_\_ Keep a list of who's coming
- \_\_\_\_\_ Call those who have not RSVP'd and ask if they're coming (see enclosed script). Only a small number of the people you invite will RSVP before they get a phone call; people are more likely to come if you call them
- \_\_\_\_\_ Contact SAGE to check-in on plans and provide an update on your RSVPs list

### **1 WEEK BEFORE SOCIAL:**

- \_\_\_\_\_ Call your RSVPs to confirm that they can still make it
- \_\_\_\_\_ Ask a friend to serve as a greeter to welcome people, take coats, sign people in, and help with last-minute details
- \_\_\_\_\_ Think about what you might say at the Social. We'll ask you to kick off the event by introducing the facilitator and sharing brief remarks about why you invited the group to your Social

### **DAY OF SOCIAL:**

- \_\_\_\_\_ If necessary, put out clear signage to guide people to your home
- \_\_\_\_\_ Prepare any food and drinks planned (sorry – SAGE is not able to reimburse you)
- \_\_\_\_\_ Make sure there is enough seating for everyone
- \_\_\_\_\_ Get excited! Your energy level can make a real difference to how well it will go
- \_\_\_\_\_ The SAGE facilitator will plan to arrive about 20 minutes before the event begins. He or she will bring a sign-in sheet and name tags for your guests.

### **PARTY TIME!**

- \_\_\_\_\_ As guests arrive, ask them to sign in on the sheet
- \_\_\_\_\_ Give your volunteer time record to the SAGE facilitator

**Enjoy Your Social!**

## Sample Invitation for SAGE Social

**Subject: SAGE Social – so future generations can thrive**

Dear [Friend's name],

I recently learned about a Portland-based nonprofit group called SAGE that inspires people over fifty to share their gifts of time and talent to safeguard opportunities for younger and future generations. I'm concerned about the challenges that coming generations face and, like SAGE, I think each of us can make an enormous positive difference in the lives of those who will follow.



For that reason, I'm hosting a SAGE Social at my [home, community center, place of worship] at [insert date and time]. I'd like you to join me and a few of my friends for this small group conversation [over drinks/snacks/dessert]. Our Social will be led by a volunteer facilitator who will ask us to share a little background about our lives, the opportunities we had when we were younger, and any concerns we have about the challenges facing younger and future generations. We'll then explore solutions, including causes and initiatives that align with our interests and concerns. At the close of the conversation, SAGE highlights specific and meaningful volunteer opportunities with local nonprofits that work on issues of importance to future generations.

Please send me a note or call me at [insert phone number] within a week or so to let me know if you can attend. Please feel free to bring a guest.

I hope you'll be able to attend. I think you will enjoy the Social.

Sincerely,

[Your Name]

### Suggested Language for Follow-Up Calls to Confirm Attendance

Hi, this is [name]. I sent you an invitation to meet and learn about SAGE at a small gathering I'm having at my [home, community center, place of worship]. I hope you can join us – will you be able to come?

## Sample Agenda for SAGE Social (based on evening event)

- 6:40 Facilitator arrives (helps host with last minute details)
- 7:00 Guests arrive
- 7:10 Host introduces facilitator; facilitator leads round of introductions
- 7:15 Facilitator introduces SAGE, and leads discussion on opportunities guests may have had when they were younger, and concerns about challenges facing younger and future generations
- 7:40 Facilitator leads discussion on some ways that people over fifty are giving forward to safeguard opportunities for coming generations, and guests explore solutions
- 8:05 Facilitator shares information on SAGE's programs, meaningful volunteer opportunities with local nonprofits, and asks guests to complete a questionnaire
- 8:15 Closing remarks







**sage**  
Senior Advocates  
for Generational Equity

# INTEREST QUESTIONNAIRE

*Thank you for participating in a SAGE Social.  
Please complete this form and leave it with your facilitator as you depart this evening.*

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Address: \_\_\_\_\_

**I would like to:**

- Receive SAGE's e-newsletter.
- Receive information about hosting or co-hosting a SAGE Social for a different group.
- Receive information about participating in SAGE's Fellowship Program.
- Receive information about forming a *Big Shift* Reading Group.
- Possibly volunteer for SAGE on a future project.  
(interests/skills: \_\_\_\_\_)
- Support SAGE (all contributions will be matched dollar-for-dollar by a donor's challenge grant).
  - For this matching grant, I pledge \$\_\_\_\_\_. Please send a reminder to the following address.  
 \_\_\_\_\_ City, State \_\_\_\_\_
  - I am leaving a ( ) check or ( ) cash donation of \$\_\_\_\_\_ in the basket on my way out.

1. What did you like best about the Social?
2. What one thing would you change to improve the format of the Social?
3. Do you have thoughts about promoting the work of SAGE?
4. Did this event motivate you to learn more about generational equity or to give forward?  
If yes, in what way?

\_\_\_\_\_

\_\_\_\_\_

**THANK YOU!**