Fundraising Step-by-Step

Step 1: Preparation

Who should I contact?

Make a list of possible organizations to call. Use your FRANK list to contact people who can help you connect with organizations who need to raise funds. Make phone calls to those organizations and determine who is the decision-maker for fundraising campaigns and when they hold their fundraisers. Refer to the script and follow the instructions for your responses.

Possible Organizations to Contact

- **Schools**
  - Class trips, graduation, choir, band, cheerleading, dance teams, booster clubs, parent-teacher organizations

- **Sports Teams**
  - Little league, soccer clubs, hockey teams

- **Service Organizations**
  - Church youth groups, Lioness and Optimist clubs, Girl Scouts, Boy Scouts, SPCA, hospitals

How far in advance should I plan?

Ideally, allow at least one month for preparation and advertising the fundraiser before it begins.

Step 2: Meet with the Decision-Maker

Make phone calls to organizations and speak with the person in charge of fundraising. If you cannot reach that person, drop off a Fundraiser Information Sheet and Organization FAQs for that person. Follow the Fundraiser Selling Script to guide you on what to say.

When you set up a follow-up meeting, take the following materials with you:

- Dip samples
- Fundraiser Information Sheet and Fundraiser Order Form
- Organization FAQs
- Successful Fundraising Tips
- Fundraiser Timeline

Most meetings will only be 5–15 minutes long, especially if you are invited in to talk to a committee during their monthly meeting.
If you do not book the fundraiser at your meeting, make a note of when to follow up with the decision-maker.

Tips:

- Bring prepared dip samples and pretzels in disposable containers for the decision-maker or committee to sample. Leave the samples behind for them to enjoy after you are gone. **Note:** when making samples to be enjoyed in small quantities, be sure to prepare the dips as per the directions on the label. Stronger flavour sells better! Remember to be “food-safe” when you are sampling dips.

- Bring along current Catalogues to show the full Epicure line of products and leave them behind with your contact information.

Step 3: Preparation for the Fundraiser

There are two parts in preparing for the fundraiser: what you need to do as an Epicure Consultant and how you can help the organization to prepare.

You will need to decide what you will do and what the organization will do. **Note:** Make sure that you do not commit to doing too much. It should be up to the organization to provide most of the labour needed for the fundraiser. You can guide them on what is needed, but don’t get caught doing all of the work.

You will also need to determine what you will provide the organization at no charge and what they will be responsible for supplying and financing. We suggest that you provide the Fundraiser Order Forms for each participant as well as the template for printing Parent Letters, Fundraiser Information Sheets, etc. Actual printing of letter templates and other documents should be the responsibility of the organization.

What you need to do:

1. **Order supplies:** You will need to order one Fundraiser Order Form per participant, plus a few extras. These can be found on the Consultant website under Business Tools/Fundraisers.

2. **Order samples:** You may order up to 5 Fundraisers as samples. Additional samples will need to be ordered in sets of 12.

3. **Provide timeline:** Provide the Fundraiser Timeline to assist the organization with planning the fundraiser. This can be found on the Consultant website under Business Tools/Fundraisers.

4. **Provide templates:** Provide letter templates and the Fundraiser Information Sheet. These can be found on the Consultant website under Business Tools/Fundraisers.
Ordering Sample Fundraisers  
Code #4306  
$11.25 each, maximum order is 5

Ordering Fundraiser Order Forms  
Code #9113  
$6.00 for 50 forms

The Fundraiser Order Form is printed front and back with a glossy photo of the dips on the front and the order information on the back.

What the organization needs to do:

1. **Set fundraiser dates.** Use the Fundraiser Timeline available to plan their fundraiser.

2. **Line up volunteers** to help with:
   a. Promoting the fundraiser/sending out announcements
   b. Distributing **Order Forms**
   c. Delivering orders

3. **Set fundraising goals.**

4. **Set up a way to track goals and communicate progress** to keep people excited.

**Step 4: Ordering and Delivering Fundraisers**

**Ordering**

Once the organization has committed to the fundraiser and you have coached them on what they need to do, your job is done until it is time to place the Fundraiser order. The organization needs to give you a total number of Fundraisers required, along with a cheque made payable to you (for $15.00 x the number of Fundraisers sold). Make sure to deposit the cheque and give it time to clear the bank before you place an order with Home Office. You want to make sure all the funds are available prior to placing your order.

**Note:** You will need to determine up-front if you will require your organization to order Fundraisers in cases of 12. If they do not order in multiples of 12, you will need to be prepared to pay for and keep any Fundraisers that are remaining. We recommend that the organization purchase dip mix selections in sets of 12. The most any organization will have remaining is 11 Fundraisers. They can advertise these extra selections and most likely can easily sell them.

**Tip:** Even though you don’t need the individual Fundraiser Order Forms to place your order with Home Office, be sure to get copies of each individual Order Form – even if you have to borrow the Order
Forms and make copies yourself. These are essential for your follow up with potential Customers after the fundraiser is over.

**Delivery**

You will receive the Fundraisers in sets of 12. You will need to place your labels on these jars prior to delivery to encourage reorders. Once you have done this, you can deliver the Fundraisers to your contact at the organization. It will be their responsibility to divide the dip mix selections and get them to the participants. The participants will then deliver individual orders to their Customers.

**Step 5: Follow Up with the Organization**

After you have placed the orders, find out who the winning class or top sales person is and award them the prize of your choice.

Once all the Fundraisers have been delivered, follow up with the leaders of the organization. Find out what worked well and what they would do differently next time. Make a note of the timing of their next fundraiser. Ask for their help in promoting the Epicure Selections® Extraordinary Cheese Dip Fundraiser to other organizations.

**Step 6: Use Contacts to Build Your Business**

Make sure to take advantage of all of the possible new Customers from the fundraiser. Follow up with them to see how you can serve them after the fundraiser. Refer to How to Profit from Fundraisers for more detailed information.