# **An Organizers Guide - Fundraising with Equal Exchange**

Congratulations on choosing Equal Exchange as your group’s fundraiser!

Now your group can:

1) Raise money for projects and programs that are important to you

2) Give your family, friends, and community great-tasting, organic, ethically sourced products

3) Support farming communities, authentic Fair Trade and worker co-operatives.

By fundraising with Equal Exchange, you are supporting an alternative trade system that benefits small-scale farmer co-ops worldwide while raising awareness about conscious consumerism in your own community. Above-market prices, Fair Trade premiums, and long term partnerships give hope to farming communities through economic support. Every purchase makes a difference!

Inside you’ll find:

* Pre-Fundraiser Tips ***pgs.2-12***:
* Fundraising FAQs ***pgs. 2-5***
* Tips on how to run a successful fundraiser ***pgs.*** ***6-7***
* School incentive ideas ***pg. 8***
* Letter template for Schools ***pg***. ***9***
* Important Dates template ***pg***. ***10***
* Instructions on distributing catalogs ***pg.*** ***11***
* During-Fundraiser Tips ***pgs.12-13***:
* Tips for how to collect orders and money envelopes ***pg.12***
* Money Tallying forms ***pg. 13***
* How to send your order to Equal Exchange ***pg. 13***
* Post-Fundraiser Tips ***pgs.14-16***
* Received Order Confirmation & Missing Order Forms for schools ***pg. 14***
* Missing Orders forms ***pg. 14***
* Tips for packing and distributing orders ***p.15***
* Thank You letter template ***pg.*** ***16***

Thank you for partnering with us! Keep your community connected to Equal Exchange fundraising for announcements and helpful tips to help you raise more money. Learn how >> [Introduce us!](http://blog.equalexchange.coop/introduce-us/)

What worked well for you? Your stories inspire others to do similar activities in their communities, so we invite you to share your stories, quotes and photos! Join other Equal Exchange Fundraisers on [Facebook](https://www.facebook.com/groups/EEFundraising/). And, please connect us to other organizers within your community so our partnership can continue!

Contact us with questions, ideas, and your stories! fundraising@equalexchange.coop

**Fundraising FAQs**

**What kind of profit margin does Equal Exchange offer?**

 You'll earn 40% profits with our catalog fundraiser.

 For event and table sales, you choose the retail prices and your profit margin! We recommend selling your products at 1.5x the purchase price.

**How much do the fundraising catalogs cost?**

Catalogs and posters are free! Order forms and money envelopes are included with the catalogs. Order a few extra catalogs to be certain you don’t run out during your fundraiser.

Need a few more? Call or email our friendly Customer Service team at 774-776-7366 or communityorders@equalexchange.coop.

**Can I receive samples to share with my group?**

You may purchase our [**Organic Foods Variety Pack**](http://shop.equalexchange.coop/organic-foods-variety-pack.html) on our web store to share with your group and promote your fundraiser, or order it at a discount on your [**Catalog Agreement Form.**](http://go.equalexchange.coop/WF-2016-05-FR-Agreement-Landing-Page_LP-Catalog-Agreement-Form.html)

**Do you offer promotional materials to help our group sell?**

Yes! Find helpful tips and resources for your entire fundraiser on our [**Tips & Resources**](http://equalexchange.coop/ee-and-you/fundraising/resources) page.

**How long do you recommend for collecting orders?**

We recommend running your catalog fundraiser for three weeks total. Three weeks is long enough for each participant to have time to collect orders from friends and family, and short enough that they don't forget about it. To account for those folks who wait until the last minute, we recommend setting a deadline two weeks after distributing catalogs. Then, extend the deadline to the third week — you'll be glad to receive those late orders!

Should a later order come in after you submit your final order form, fill out a new master order form and submit separately.

**Can we fundraise year-round?**

Yes! To receive more catalogs, please send an email to communityorders@equalexchange.coop.

Please note that shipping chocolate when temperatures are 70 degrees or more may incur an extra $10.00 insulation fee. This summer shipping policy is in effect May 1st through September 30th.

**I have a small group or am an individual. Can I still do this fundraiser?**

Yes! We are happy to accommodate small groups and individuals. When everyone is motivated to participate, small groups can be very successful!

### **Ordering**

**I didn't order enough catalogs. Can I order more?**

Yes! E-mail us at communityorders@equalexchange.coop and let us know how many you need. We will ship them right away.

**Is there a minimum order?**

There is no minimum order.

**Will Equal Exchange pack each student's order separately?**

No. We ship your catalog order in bulk with paper shopping bags to help you sort and distribute products. This is the fastest and least expensive way! Tips for distribution, click [here](http://equalexchange.coop/ee-and-you/fundraising/wrap-up).

**What is the turnaround time between placing our order & receiving it?**

You will receive your order within 10 business days.

**How much does shipping cost?**

|  |  |
| --- | --- |
| **Order Total (Wholesale price)** | **Shipping Charge** |
| $0 - $44.99 | $7.95 |
| $45 - $89.99 | $9.95 |
| $90 - $134.99 | $12.95 |
| Above $135 *(catalog pricing approximately $190)* | **Free** |

\*You can find special shipping instructions for Hawaii and Alaska [**here**](http://shop.equalexchange.coop/shipping-and-returns)**.**

**Can we order other Equal Exchange products besides those listed in the catalog?**

You may add on products that are not listed in the fundraising catalog by asking for these products in comment section of the order form submission page or call our customer service team after you submit your order at 774-776-7366. You can receive lower wholesale for products not listed in the fundraising catalog by ordering products by the full case. We do not guarantee you will make a profit on items not listed in the fundraising catalog.

**>>Tip – Plan a table sale or tasting event!**Receive special wholesale pricing for cases of product by creating an account for your organization on our [**web store**](http://shop.equalexchange.coop/organization/account/create/)(to see the special pricing, you must be logged into your account), or by requesting a [**wholesale catalog.**](http://equalexchange.coop/ee-and-you/community)You can sample products in the catalog to boost sales during your campaign or sell directly at your event!

**We've collected all our orders and filled out our master order form. How do we submit our final order?**

Upload your master order form to our website. [**https://equalexchange.coop/ee-and-you/fundraising/order**](https://equalexchange.coop/ee-and-you/fundraising/order)

If you must place your order via phone, please call 508-427-5208 before 4PM EST Monday-Friday. Be ready to provide item totals and item codes.

**When do we receive our profits?**

With a catalog fundraiser, you receive profits as you go! At the end of your catalog sale, once you receive your order, your group sends payment to Equal Exchange for the wholesale cost of the products only. You keep the 40% profit, of the total amount that you raise, upfront.

**I am missing some items and/or have additional items? What do I do?**

Email us at communityorders@equalexchange.coop and include the information (product description and order number). We will send those items to you as quickly as possible. If you have extra items and would like to keep them to use as incentives, please let us know because we will have to invoice you for those additional items. If you would like to return them, we can schedule a pickup with UPS. Just email us the products you will be returning and the address they will be picked up from and we will handle the rest.

### **Food Facts**

**Are the chocolate bars without nuts processed in the same facility as those with nuts?**

Most of our 80g (2.8 oz) chocolate bars are made in Switzerland and are made in a facility and on equipment that also processes hazelnuts and almonds. There are no peanuts present in the facility, but because of the severity of peanut allergies and the risk of cross-contamination before ingredients arrive at our facility, they are listed on the allergen statement. It reads: "May contain milk, peanuts, hazelnuts, almonds & coconut."

The only bar where nuts are listed as an ingredient is our Dark Chocolate with Almonds.

**Do you have a Kosher-only fundraiser?**

Currently, we do not offer a Kosher-only fundraiser, but most of our products are certified Kosher. If you are interested in receiving a list of the products in our fundraising catalog and their kosher certifications, please send an email to fundraising@equalexchange.coop.

### **Misc**

**Is Equal Exchange Fundraising an environmentally friendly fundraiser?**

Yes! Equal Exchange Fundraising offers organic & fair trade foods and gifts and is an environmentally-friendly alternative to conventional fundraisers.

Organic farming practices mean that no chemicals or pesticides are used in the production of most Equal Exchange products — which benefits the farmers, the surrounding environment, birds and other wildlife, as well as the people who enjoy these products. Over 98% of Equal Exchange coffees are certified organic by volume. The overwhelming majority of these organic coffees are shade-grown. Some of the coffees that are not shade-grown are produced in places where deforestation has already occurred; the land in these areas is in transition and in the process of being restored with agro-forestry systems using coffee as the principal crop. From our perspective, shade-grown certification does not significantly alter the practices of farms that are already Fair Trade and organic certified.

Fair Trade principles also encourage sustainable farming practices so that farmers are able to remain on their land and enjoy productive harvests. Additionally, many of our farmer partners are involved in land diversification projects and other environmentally-focused projects within their communities.

**Do you have lesson plans for teachers about Fair Trade or chocolate co-operatives?**

Yes, our curriculum for grades 4 – 9, [**Win Win Solutions: An Introduction to Fair Trade and Cooperative Economics**](http://equalexchange.coop/ee-and-you/education/for-your-classroom/curriculum), is available online to download one unit at a time. You can find additional educational resources on our [**For Your Classroom**](http://equalexchange.coop/ee-and-you/fundraising/classroom)page. You can also use our History of authentic Fair Trade Comic Book. Available in [English](http://equalexchange.coop/sites/default/files/HistoryofFairTrade.pdf) and [Spanish](http://equalexchange.coop/sites/default/files/SpanishFullComic.pdf).

**Tips for a Successful Catalog Fundraiser**

***Build a good team:***

* An effective team consists of folks that bring different skills to the table, so cast a wide net! Try involving parents that are new to school -- it’s a great way for them to get involved in the school community.
* Look for the:
	+ **People Person.** Find someone who is great at sending out short, friendly reminders to the parent community throughout the fundraiser and rallying support. This person should be well-connected and active in the community and on social media.
	+ **Money Manager.** Find someone who is detail-oriented and good with numbers to keep track of how the money is coming in.
	+ **Task Master.** It’s important to have someone who can keep track of fundraising milestones. This person can be in charge of deadlines and keeping team members and the community on schedule.

***Set goals:***

* Set a goal for how much money your group wants to raise. Take a look at our different products and determine how much product your group will need to sell to meet your goal. Our online [**profit calculator**](http://equalexchange.coop/ee-and-you/fundraising/profit)will help you determine this.
* Make your goal clear and mention it as much as possible. Build a fundraising goal board. Post our [**goal chart**](https://eqex.imagerelay.com/sb/675b11fe-c401-4731-8c9d-bdf697774108) in visible places so participants can track their progress. Keep everyone motivated by filling in your progress bar together as you go along.
* Let everyone involved know how much they have to raise – individually or as a group / class - in order to reach the overall fundraising goal.
* Have a plan for the number of fundraisers you plan to do this year. Be sure not to overload your group or your prospective customers with too many fundraising campaigns. Doing just a few will allow you to focus your efforts for success.

***Promote, promote, promote:***

* Serve samples at a large event to spike sales. You can set up a table at community or school events to let people try the products and talk to them about your upcoming fundraiser.
* Write an article for the local newspapers or community bulletins. Submit a copy to other community groups for their own newsletters. Think broadly: reach out to schools, workplaces, places of worship, or local community groups. Make sure to tell them about your group, your purpose, and how they can order products.
* Create a display on a community bulletin board describing your group and sharing information on how to order.
* Post about your fundraiser on your social media pages. (Tips for social media <https://blog.equalexchange.coop/boost-fundraising-with-social-media/>) Encourage all involved in your group or your school to share your posts so that their friends and family know about the fundraiser and hopefully will be motivated to buy something! You can find pictures and content to post[**here**](https://equalexchange.coop/ee-and-you/tools)**.**

***Show them how an Equal Exchange Fundraiser is different:***

* This isn’t your usual popcorn, artificial candy or cheap knickknack fundraiser! Be clear about what you’re offering: organic, fairly traded and truly delicious coffee, tea, chocolate and more --things they’ll be excited to try and share with friends and family.
* Use our [**pamphlets, brochures, and posters**](http://shop.equalexchange.coop/gifts-more/education-and-display.html) from our different products that feature information about our farmer partners and about how and where the product was made. Many of our materials are free and can be ordered online.

***Rally support for farmers:***

* Inspire and engage customers with information about what their purchase will make possible, both for your group and for the farmers behind the products.
* Get all of your participants excited by connecting the fundraiser to what is important to them -- it will take on greater meaning for them. (Teach about fair trade and reach your fundraising goal!) Help draw the connection between small-scale farming communities and the things they see in the fundraising catalog with our [**videos, presentations and more**](http://equalexchange.coop/ee-and-you/fundraising/classroom). They can also take what they learned and use them as talking points when discussing the fundraiser with potential buyers!

\***Columbia Falls Spotlight:** This school had student council reps give a presentation in their classroom prior to the fundraiser about Equal Exchange and the importance of Fair Trade.

***Have a kick-off event:***

* Gather your community to announce your fundraiser and get everyone excited! Announce your overall goal, any incentives (if you have them planned), and the schedule of your fundraiser.
* **For schools**:
* An assembly is a great way to get faculty, administration, and students involved. Make the assembly fun and entertaining and try to involve as many as you can.
* Have each homeroom teacher distribute the catalogs right after the kick-off assembly while the kids are still excited!

**\*Columbia Falls Spotlight:** This school had their choir participate in the assembly and put on a short skit about how to sell and collect orders.

**Incentive Ideas for Schools**

Incentives are the best way to get all in your school excited to fundraise. We suggest free or low-cost, fun experiences that let the class celebrate as a group and take a break from their normal routine. Below are some memorable and popular ideas we recommend:

***For the top selling homerooms:***

* Pizza party hosted by the principal
* Dress-up or dress-down day
* Wear your favorite team’s jersey to school
* End of the day movie
* Pajama day
* No homework day
* Extra recess
* Lunch outside

***For the top selling students:***

* Principal for the day
* Lunch with the principal
* Announce morning announcements
* Feature in the school newspaper
* Photo on the school bulletin

***End of Fundraiser Assembly:***

Once your fundraiser is over, all the money is counted, and all the products are distributed hold an End of Fundraiser Assembly. After over a month of hard work, this is a great way to thank everyone for their participation, recognize top sellers, and have fun!

**\*Columbia Falls Spotlight**: Check out the [**write up**](http://www.hungryhorsenews.com/article/20161207/ARTICLE/161209990)about Columbia Fall’s End of Fundraiser Assembly in their local newspaper! See how they recognized their top sellers and what their principal had to do because their school reached their fundraising goal.

**For Schools**

**Letter Template-***For Parents*

The catalogs have arrived!

On your mark... Get set… Go!

We are kicking off our annual fall fundraiser! This year we are partnering with Equal Exchange, a worker-owned cooperative that offers fairly traded products produced by small-scale farmers around the world.

We are offering delicious and organic chocolate, coffee, cocoa, tea, gift boxes and more! The items are reasonably priced and our group makes 40% of the profit on every product we sell.

Our group’s fundraising goal is **$X,XXX.**

Together we can raise the funds to support:

· \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

· \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

· \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Catalog order forms are due on **[Enter Date].**

And you can expect to see your products during the week of **[Enter Week].**

Please make sure you collect the payment at the time of the order. Customers may pay by cash or by check. If they decide to pay by check, they can make it out to **[Name of your School/Organization].**

Thank you for your support and please feel free to contact me with any questions or concerns!

 **Organizer’s name & email**

**Important Dates**

Presentation about fair trade: **[Enter Date]**

Fundraiser kick-off & catalog distribution: **[Enter Date]**

Catalog fundraising days: **[Enter Dates]**

Hand in compiled orders and checks to organizer: **[Enter Date]**

Product distribution: **[Enter Week]**

Notify organizer about missing products: **[Enter Date]**

**Catalog Distribution Tips**

* Give everyone a catalog and encourage everyone to sell, even if they can only sell a few items.
* Have participants fill out the collection envelope before they leave. Have them list:
	+ Due date
	+ Their name
	+ Phone number
	+ Homeroom teacher (if applicable)
	+ School (if applicable)
* Remind them to collect money at the time of the sale.
* Remind them of the overall fundraising goal and how they will help reach it.

**Collecting Orders and Money Tips – for large groups**

* Encourage participants to turn in completed collection envelopes as soon as possible.
* Count money and match with orders as you receive them.
* Put each participant’s order in a separate envelope. Label with name, total amount collected, and any other organizational information you need.
* If someone is short on their money, make note of this and let the key organizer know.
* Put all the participants’ envelopes into the master envelope (for big groups, separate accordingly).
* Put each student's name and total on the master envelope for your group. This is so the organizer can easy recognize the top sellers from different groups or classes.
* Turn the master envelope into the fundraising organizer.

**\*Columbia Falls Spotlight:** Leslie DiMaio, the fundraising organizer, created these tips and instructions to help the teachers at her school better facilitate catalog distribution and collection.

**Individual Money Tally Form-***For Teachers & Students*

Homeroom:

Student Name:

Date:

Order Total: Amount Short:

Student Signature:

Homeroom Teacher Signature:

**Class Money Tally Form-***For Teachers*

Total homeroom money due:

Total homeroom money received:

Student Name: Amount Short/Extra:

Student Name: Amount Short/Extra:

Student Name: Amount Short/Extra:

Student Name: Amount Short/Extra:

Student Name: Amount Short/Extra:

Student Name: Amount Short/Extra:

Student Name: Amount Short/Extra:

**Ordering Information**

**To Compile the Master Order:**

1. Collect individual catalog order forms and payments from your participants. Be sure to double check the total product quantities and dollars due on each individual order form.
	1. Check that the total packages ordered per product (the total of each column) along the bottom are correctly totaled.
	2. Check that the total dollar amount due (in the bottom right hand corner) equals the sum of the price per product multiplied by the total number of packages per product.
2. Download the Master Order Form **here.** Only use with MS Excel (2007 or later). If you do not have Excel, please email fundraising@equalexchange.coop.
3. Go to the **blue “Enter Orders” tab** and begin entering your order by participant. Use one column per order form.
4. Click the **red “Order Summary” tab** to fill in your billing and shipping information.
* Check that the totals listed in the top right hand corner match the totals that you have.
1. Save the document on your computer desktop then upload it onto our web submission form located here: [**https://equalexchange.coop/ee-and-you/fundraising/order**](https://equalexchange.coop/ee-and-you/fundraising/order)
2. Print a copy of the **Order Summary tab** for your records.

 For more instructions, check out our [**video**](https://equalexchange.wistia.com/medias/h8yrryjmq2)**.**

\*If you are from a larger school, you can have each homeroom teacher fill out the master order form and then you can gather them in a folder, with each form saved as the teacher’s last name. Make sure you label the folder with your school’s name. You can send the folder to fundraising@equalexchange.coop and we will compile the orders for you.

**I Received My Order-***For Students*

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ‘s homeroom, received \_\_\_\_ / \_\_\_\_\_\_ items.

I understand it is my responsibility to deliver the individual orders to my customers, as soon as possible.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Student signature Teacher signature

 **Missing Order Form-***For Students*

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Homeroom Teacher: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note the missing item by item name, item code, and total amount missing.

See example below:

Name of item Item Code Total

Hot Cocoa Mix X-1 2

\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_

\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_

\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_

\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_

\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_

**Tips for Packing and Distributing Orders-** *For You*

Below are our step-by-step packing and distributing tips. You can also [watch our video](https://equalexchange.wistia.com/medias/h2cf7cs4q7)!

1. Now that you have placed your order with us, start recruiting volunteers for a packing party. You’ll need plenty of enthusiastic helpers to unpack and sort your order! Bring snacks and drinks to keep the process energized and fun!
2. Let all know which day they will be receiving their Equal Exchange products.
3. Unpack the boxes:
	1. We suggest having a box cutter or pair of scissors on hand to open the boxes, but be careful not to cut into the products inside. *Don’t cut too deep.*
	2. Unpack and line up products in the order they appear in the catalog. This makes an easy assembly line for volunteers to pack orders. This blog post can help you plan your space. [**https://blog.equalexchange.coop/prepare-distribute-fundraising-order/**](https://blog.equalexchange.coop/prepare-distribute-fundraising-order/)
	3. Grab a red bag and an order form and fulfill the order. Double check that the order was packed accurately after filling. Place the order form in the bag with the products, and then place the bag in a labeled area for that student's class or grade.
	4. For extra clarity, write the name of the participant on their red bag.
4. Clean up:
	1. Break down and recycle leftover cardboard boxes.
	2. Have participants retrieve their orders from a secure location.

*What to do with extra products:*

Once all the orders have been filled, you may have extra products on hand (check the **“Order Summary**” tab on your master order form to verify). Extras are easy to sell or give away as parent/teacher gifts or raffle prizes. If you would like to return them, please contact us at 774-776-7366.

**Thank You to Participants-***For You*

***Email Template***

Dear **[Enter Name]**,

Thank you for participating in **[Enter School/Organization’s Name]** fundraiser! Your generous contribution helped us raise **[Enter Amount]**, which will be used for **[Enter Information].**

We greatly appreciate your support in helping us reach our fundraising goals! With your purchase, you have also helped support the authentic Fair Trade movement and the small-scale farmers who produced your products.

We hope you enjoy everything!

***Other suggestion:***

Use social media, your website and newsletters to post a **thank you** message to all who participated in your fundraiser. Using social media let’s others share your post. Include pictures and stories of whatever your catalog campaign raised money for. This helps lay the groundwork for a successful fair trade fundraiser for next year!