Wine & Cheese Fundraiser Planning Guide

Thank you so much for being interested in holding a home-based wine and cheese party to benefit the Cure JM Foundation! The Cure JM Foundation is actively working to find a cure for juvenile myositis so that no child will have to suffer with this cruel disease. The fundraising you do will help get us closer to that goal.

This Fundraising Tool Kit was developed by the Cure JM Foundation to assist you. It's filled with tips to try to help you be able to succeed and to keep you from having to reinvent the wheel. If you need additional assistance, please feel free to contact Shannon Malloy by email (shannon@curejm.org) or by phone (760-487-1079) for additional information. We want to help you have a great event.

Wine & Cheese Home Party

A home-based fundraising event is a warm, relaxed way to raise funds. The format of this type of event is very flexible and you can do what feels comfortable to you.

The idea of a home-based party is to invite people who may be interested in and capable of supporting Cure JM to raise funds for the Cure JM cause. It’s an especially great way to introduce people to Cure JM and ask them, for the first time, to give to Cure JM. It’s also a wonderful way to bring together people who have already been introduced to Cure JM, but who are not yet supporters of Cure JM, to invite them to be a part of the Cure JM family of friends and advocates.

In brief, you hold an event in your home, serve refreshments, and mingle. At some point during the evening, a very brief program is presented in which information about Cure JM is shared, and someone who is part of the program, invites guests to support Cure JM.

Guests

Most home-based events are relatively small. They can be attended by as few as 8 people and as many as you feel comfortable hosting in your home. Generally, parties that are about 16-30 people are great—a lot fewer and people feel “put on the spot” when there is an ask and a lot more and the party no longer feels intimate. The size of the party is entirely up to you and what you feel comfortable entertaining in your home. Some wine and cheese parties, in very large homes, have as many as 135-150 guests.
You’re encouraged to invite as many friends, family members or associates as you would wish to introduce to Cure JM. In making a guest list, please contact one of the Cure JM fundraising staff members to assist you in identifying people who live in relatively close proximity to you who have expressed an interest in Cure JM. Some of the people who are already familiar with Cure JM living in your area may be willing to help with the party in some way. Cure JM can help you finalize your event invitation list.

A Cure JM Board member or family member near you may also be willing to partner with you to produce the party, to co-host, to prepare food or share in the costs of hosting.

**Note:** even though this is a fundraising event, it is best not to charge people admission to attend. If you do charge people to attend and you serve alcohol, you may need to consult the local alcohol ordinances because local authorities may consider this “selling alcohol.” It is best for this to be treated as a private home party in which guests are treated as they would be at any other home party where the refreshments are offered gratis.

Also, when serving alcohol in your home, you will want to make sure that all guests have a way to get home safely. Be sure to offer food and other, non-alcoholic beverages. Please drink and serve responsibly.

**Food**

There is no need to prepare a large amount of food or elaborate dishes. Providing some light hors d'oeuvres is great. To keep things simple, consider pairing the wine and cheese with crackers, fruit (fresh and dried) and dark chocolate.

If you are very short on time, you might want to work with a caterer to prepare the food.

**Format and Theme:**

While this guide recommends and discusses a wine and cheese format, other formats can be used such as a backyard BBQ. A more formal event is preferable when potentially high dollar donors are in attendance. A more formal reception also helps to set the tone for an ask that you want to be given serious consideration. This toolkit is written with those who are planning a wine and cheese event, but it could easily be adapted for those who wish to conduct their in-home party with a different format.

If you wish, you can make this a wine tasting and invite a sommelier, a professionally trained wine expert. You can ask at your favorite fine restaurant about their sommelier or at a local winery. Having a sommelier can be a great deal of fun because a sommelier will tell you interesting things about the wine’s flavor and history and may even have suggestions on how to taste the wine such as “You must take 3 sips of this wine in order to experience the full flavor. On sip one…” Be sure, if you decide to go in that direction to consult with the sommelier in advance to ensure that you have things set up as needed. You might need, for example, containers to collect undrunk wine. The sommelier may also have suggestions on food pairings.
You can choose a theme if you wish—an upcoming holiday or seasonal theme always works well. Near the end of the year, when people are in a giving spirit, is a great time to host one of these events, but it isn’t necessary to wait until the end of year to hold an event.

In addition to themes surrounding the calendar, you can also pick a theme centered on a particular type of wine or cheese (all Italian wines, all goat cheese, etc.).

**Wine**

Some notes on wine: The typical (750 ml) wine bottle serves 4 or 5 glasses (depending on how much you pour). Most people estimate 4 glasses/bottle. Typically, guests consume 2 glasses of wine per hour. So what you generally need are:

\[
\frac{2 \times [\text{# of guests}] \times [\text{# of hours}]}{4}
\]

You may wish to purchase an extra bottle or two to ensure that you don’t run out. Typically a selection of 4-5 different wines is a good mix.

There are some online wine calculators that are useful:

- [http://www.tableandvine.com/party_planning.html](http://www.tableandvine.com/party_planning.html)

Recommended wine temperatures:
- Whites & Blushes: 55° - 60°, refrigerate a few hours
- Reds: 60° - 65°, refrigerate for 15 minutes or chill in an ice bucket for 5 minutes

There are many sources of information about wine selection and wine and cheese pairings on the internet and on YouTube. Here are just a few

- Wisconsin Cheese Food Service has a great online tool that will help with pairings. You can choose a cheese you like and it will recommend several different types of wine. You can also start with a type of wine you like and it will suggest cheeses. [http://www.wisconsincheesefoodservice.com/menuing/courses_and_pairings](http://www.wisconsincheesefoodservice.com/menuing/courses_and_pairings)
- [https://www.youtube.com/watch?v=GCbCqBy1bqU](https://www.youtube.com/watch?v=GCbCqBy1bqU) – pairing cheese with wines by Artisanal Premium Cheese
- Your local wine shop should also be able to make some great suggestions.

**The Party Program**

Recommended Party Length: Approximately 2-2.5 hours

I. Arrival/Mingling – 1st hour
Guests arrive and mingle. Take coats. Welcome your guests. As party host, make introductions.

Talking points:
- The organization has been critical for our family.
- Share story of personal connection to the cause
- JM is incurable. While some experience remission, for many the disease is life-long battle. The disease can even be fatal.
- We need a cure now.

II. Presentation (approximately 1 hour into party – duration 15-20 minutes—no more)
- Host gathers everyone into same room. Thank any co-hosts, sponsors, or friends who have helped with the party.
- Again, thank everyone for coming to learn more about JM
- Introduce “special guest” from Cure JM (board member, staff member, or key volunteer who is going to make presentation Shannon, Rhonda, Mitali, Shari, etc.). Note that the Cure JM staff can assist you in determining whether or not there might be a Cure JM funded researcher in your area who is appropriate to invite to be a part of the presentation. If no researcher or member of the Cure JM leadership team is present as a “special guest,” host himself or herself may offer the presentation. Most people do not want to hear the same person speak for an extended period of time (unless the speaker is incredibly entertaining), so it’s helpful to mix it up a little and have different Cure JM friends to offer different parts of the presentation.
- Presentation – Keep to 20 minutes or less (including host’s preliminary words):
  - Brief intro to Juvenile Myositis (5 minutes)
    - Group of rare and life-threatening autoimmune diseases, in which the body’s immune system attacks its own cells and tissues.
    - Primarily affects muscle and skin – might sound minor, but heart is a muscle, most of body is either skin or muscle and illness can be fatal
    - At present, there is no cure
    - We need a cure and are working for a cure.
  - Story (either presenter or other Cure JM member) – (5-7 minutes)
    - Story Narrative:
      - One of their Family member suffers symptoms
      - Diagnosis (may have taken tons of time)
      - Emotions since diagnosis - shocked, fearful, …
      - Found Cure JM and what Cure JM means to family (some examples include):
        - Key source of information
        - Source of community/family/support – others who understand
        - Source of hope – research not being done by others in the medical community because of rare incidence
        - Cure within reach
Video: very brief (5-7 minutes) (Optional). Suggested videos from Cure JM website: [http://www.curejm.org/teamjm/video.php](http://www.curejm.org/teamjm/video.php) or Cure JM YouTube Channel: [https://www.youtube.com/watch?v=gXlobnnqbig](https://www.youtube.com/watch?v=gXlobnnqbig)

Ask (2 – 5 minutes) – Party Host or Other Cure JM representative -
This is very brief because the stories have done their work. This is not a hard-sell at this point. This should be a simple ask with information on how to give. Example:

- When I invited you to this evening’s party, I let you know that we would learn more about JM and raise funds for Cure JM. As you can see, this disease is very serious and it has profoundly affected our family’s life and the lives of others. It’s a rare, orphan disease, not supported by any other nonprofit organization. Cure JM is so important to me that I serve on the Board of Directors (or Advisory Committee) and personally contribute to this organization. I’d like to invite you this evening to help make a difference in the lives of children who are affected by donating to Cure JM. This evening, you can make a donation by check or [Volunteer Board Member or Staff member] over there has a square reader so we can also accept credit cards. Any gift that you can make is greatly appreciated. I want you all to stay and to continue enjoying the good wine and food and, of course, I’ll be here if you want to ask any questions.

Costs

As host or hostess, you will need to pay or solicit donations for the food and wine you serve. If you cannot secure donated wine, there are several ways to get it at a reduced cost. If you have a favorite restaurant that you frequent or a personal/professional connection to a restaurant owner, sometimes the restaurant owner can successfully requested donated wine from his or her supplier. Most wine stories and wineries are asked often for donations. Consider asking your local, favorite wine shop or winery if you could purchase the wine at a wholesale cost or if they might ask their supplier to donate. If you purchase all of the wine at the same place, you may be able to negotiate a volume discount.

Another thing to ask for that might help with costs—ask if the store or restaurant will take back un-opened bottles after the party.

You can also save on the cost of food by asking for food to be donated. Consider asking a favorite restaurant to donate a platter of appetizers. Often grocery stores are willing to donate a platter or food such as produce.

Co-hosting the party is a great way to split the costs of the party. If co-hosting, you can also pool resources like wine glasses. Should you and your co-host not have enough wine glasses, local party rental shops do rent them.

You can also ask a business to sponsor the event. Requests for a sponsorship are more likely to be successful if you have a personal connection to the business owner or manager.
Planning Timeline

6-8 Weeks Prior to Party

- Complete your Third Party Fundraising Application form from the Cure JM Foundation website. The fundraising guidelines and application form can be found at [http://www.curejm.org/teamjm/fundraising_guidelines.pdf](http://www.curejm.org/teamjm/fundraising_guidelines.pdf). If you have not already, please send the completed application form to fundraising@curejm.org or fax to 760-230-2243. Once your event has been approved, you'll be on your way!

4-6 Weeks Prior to Party

- Send out invitations. Old fashioned hand-written (or computer printed), paper invitations are still very nice. Evite or Facebook invitations also work well. Encourage people to RSVP, but note that most won’t or won’t RSVP until very close to the party.

- If you plan to use a caterer, you will want to do that right away, especially if your party is large. The more popular the caterer and the larger your party, the earlier you need to book a caterer. If you are planning to have a very large party, a caterer will need to be booked months in advance.

- If you are not using a caterer, you will want to plan your menu. If you are planning to ask local restaurants or wine shops to assist you by providing free food or wine, you should ask right away.

- If you need to rent any equipment (like wine glasses), you will want to reserve it right away.

1 Week before Party

- Send a friendly reminder to guests (email is perfect). If you still haven’t had RSVP’s, you might make phone calls and ask if your guests will be able to attend. Note that some people consider that rude. Personally, I call and just let people know that you’d really like them to come: “I so want you to meet [person]” or “I really hope you can attend.” 9 times out of 10, people just haven’t gotten around to RSVP’ing and many people appreciate the reminder and that you care enough to call.

- Go ahead and purchase any food that won’t perish (like cheeses and baking supplies). Pick up or arrange for pick-up/delivery of your wines.

1 Day before Party

- Re-arrange your home any way that is necessary to allow for the traffic flow of people.

- Make any last minute grocery purchases (for example, fresh fruit or vegetables) that you weren’t able to purchase the week prior.
1 Hour before Party

- Open several of your wine bottles that you are certain will be drunk.
- Bring cheeses out of the refrigerator so that they can warm to room temperature. Leave the cheese covered until time for the party to begin so that the aromas of stronger cheeses do not overwhelm the milder cheeses.
- Set out appetizers

Following the Event

- Clean-up.
- Return rented glassware.
- Thank your guests for coming with a personal note.
- Thank any businesses that may have contributed or sponsored.
- Report on fundraising results to your guests and any sponsors.
- Send to Cure JM a report about the event.
- Send to Cure JM any money checks written, money collected, or pledge cards filled out.

Supplies

In addition to food and wine, you will want to have on-hand:

- Glassware (wine and water glasses)
- Salad or desert plates
- Napkins
- Name tags (optional)
- Credit card reader (Cure JM has a Square card reader to attach to an iPad or cell phone)
- Pens for check writing
- Sign in sheet or guest book
- Pledge Cards if people would prefer to make a gift later, rather than that evening
- Cure JM bracelets if you wish to distribute them
- Favors (optional) for guests to take home
- TV and equipment to show video (such as hooking tv up to a computer or the internet, Chrome Cast, or having the video available on DVD).

Final Tips & Tidbits

Traditionally, red and white wine are served in two different size glasses. Red wines are served in larger, more rounded glasses which allow the wine to open and breathe better. White wines are traditionally served in smaller, more narrow glasses. (Do not fret about this if you are unable to scare-up different glasses).

Wine bottles can make fun thematic decorations (wine bottles with candles in the top; wine bottles with a fresh rose in them).
Small tables stationed all around your home are wonderful to allow guests to set glasses down while talking or eating.

You can offer all guests with Cure JM bracelets as they enter and take pictures of all guests holding up their bracelets.

If you may not have all of the guests names and/or contact information, consider a guest book or sign-in sheet to capture information.

If you don’t have a home that is large enough to host the event, consider other places in the community. Places that offer the opportunity to make a painting while enjoying wine, for example, are often entertaining experiences for your guests.

Questions, Help, & More information

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