



*To build partnerships among volunteers, families, and the community to transform lives and revitalize neighborhoods by enabling families in need to earn and own a simple, decent, affordable home.*

## Third-Party Fundraisers

Habitat for Humanity Portland/Metro East (Habitat) appreciates all who want to help us further our mission. One of the many ways to support us is by planning an event to raise funds for our affiliate, known as a "third-party fundraiser." We are grateful for funds raised; they help us to continue building locally.

As an event organizer, we ask that you assume the responsibility of creating an event without any (or very limited) staff assistance. The nature of these fundraisers limits us because we cannot schedule, budget, nor predict a reliable source of revenue from such events. Therefore, we reserve our resources for Habitat special events and fundraising efforts but will be happy to provide support as listed below.

Thank you in advance for your time and energy on this project. We have put together the following so all participating parties are clear on their roles and responsibilities.

## The Process...

### Before Your Event

Please mail, fax, or e-mail a completed "Third-Party Fundraiser Description Form" as follows:

Tracy Matchett, Development Coordinator  
Habitat for Humanity Portland/Metro East  
P. O. Box 11527  
Portland, OR 97211

Fax: (503) 287-4649

E-mail: [tracy@habitatportlandmetro.org](mailto:tracy@habitatportlandmetro.org)

### Next

You will be contacted by Habitat to let you know if your event has been approved.

Each request will be considered individually. Generally, the following typically will not be approved:

1. Fundraisers falling in close proximity to a Habitat event.
2. Fundraisers that rely heavily on the use of Habitat staff and/or volunteers.
3. Fundraisers that require significant response from our mailing list to generate the majority of revenue.
4. Fundraisers planned by businesses or individuals known to conduct themselves in a manner incompatible with our mission.

### After Your Event

1. Please submit all contributions along with a "Third-Party Fundraiser Summary" to Tracy Matchett at the address above.
2. Be sure to thank each donor and supporter!

# A Few Guidelines...

## Staff

Generally, Habitat will not provide staff or volunteer support for third-party fundraisers.

## Marketing

The Habitat name and logo cannot be used to promote a third-party event without prior staff approval. All approved third-party fundraisers should submit copies of printed materials which include Habitat's name/logo prior to printing or posting on a website.

Terms of the donation shall be advertised in marketing and promotional materials. This includes: the portion of the ticket price which will be donated, the duration of the fundraiser, and any maximum contribution amount set (ex. 50% of profits, one-time donation of \$1,000, or all proceeds).

Any contact with media must be coordinated with Habitat.

## Funding

Please keep accurate accounts of your event. Habitat will not incur third-party expenses or provide any funds for third-party events.

Contributions may be tax-deductible:

- \* If individual donors would like a receipt from Habitat, they need to make their donation in the form of a personal check payable to Habitat for Humanity Portland/Metro East.
- \*A donation of cash or items solicited on our behalf is tax-deductible only when it is made directly and entirely to Habitat. We will determine what types of gifts can be considered tax-deductible prior to solicitation, as we are the only agents who can verify the gift to the IRS.
- \*When a portion of the charge or "suggested donation" to the participant is not tax-deductible, a statement to that effect must be included in all appropriate materials.
- \*If your event is held in December, please ensure that gifts and accompanying documentation are turned in or mailed to Habitat by 12/31. This will ensure that donors are eligible for tax benefits in the calendar year the gift was made.

## Recognition

The following is recognition available for approved third-party fundraisers:

### Fundraiser contributing \$100 - \$999

- Use of Habitat for Humanity Portland/Metro East's name, not logo
- Handouts about Habitat
- Advertisement on website (if open to public, and with advance notice)

### Fundraiser contributing \$1000 - \$4999

Those listed above, plus:

- Advertisement in newsletters (if open to public, and with advance notice)
- Recognition on Habitat's website

### Fundraiser contributing \$5000+

Those listed above, plus:

- Use of Habitat's logo
- Press Release sent to media by Habitat (if provided by organizer)
- Habitat representative available to speak at your event
- Opportunity for one group volunteer day on site (up to 10 people)

# Third-Party Event Description Form

## Proposed third-party event

Name of event: \_\_\_\_\_

Date(s): \_\_\_\_\_

Location(s): \_\_\_\_\_

Target Audience: \_\_\_\_\_

Detailed event description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you need staff support from Habitat to complete your event? \_\_\_\_\_

If yes, please provide details. \_\_\_\_\_

\_\_\_\_\_

## Contributions

What is the total amount of revenue you estimate will be generated from this event?

Total Revenue anticipated \$ \_\_\_\_\_

Total Expenses projected \$ \_\_\_\_\_

What percentage of the Net income will Habitat receive? \_\_\_\_\_

Any maximum or guaranteed minimum that will be contributed: (max/min) \$ \_\_\_\_\_

Source(s) of Income (ex. Ticket sales, auction, etc.) \_\_\_\_\_

\_\_\_\_\_

Anticipated Corporate Sponsor(s): \_\_\_\_\_

\_\_\_\_\_

Types of Expenses (ex. Printing, food, location, etc.) \_\_\_\_\_

\_\_\_\_\_

## Event Organizers

Primary Contact: \_\_\_\_\_

Title: \_\_\_\_\_ Company: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Day Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_ Other: (\_\_\_\_) \_\_\_\_ - \_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_ - \_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Secondary Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Day Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_ Email: \_\_\_\_\_

I have read and agree to follow Habitat for Humanity Portland/Metro East's third-party fundraiser guidelines.

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Signature

Date

Thank you, your third-party fundraiser will be reviewed and you will be contacted.

Tracy Matchett, Development Coordinator  
tracy@habitatportlandmetro.org / (503) 287-9529 ex. 25

