



Third-Party Fundraisers

A helping hand from our community



Planning a Third-Party Fundraiser

Habitat for Humanity Portland/Metro East appreciates all who want to help us further our mission. One of the many ways to support Habitat 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 or predict a reliable source of revenue from such events. Therefore, we reserve our resources for Habitat-sponsored 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.

Fundraiser 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.

- Any contact with media must be coordinated with Habitat.
- 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).

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.

Third-party fundraisers are a fun way to be creative, have fun and raise money for Habitat.

Recognition

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

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Fundraiser contributing \$100 - \$999

- Use of Habitat’s name, not logo.
- Handouts about Habitat.
- Advertisement on website (if open to public, and with advance notice).

Fundraiser contributing \$1,000 - \$4,999

Those listed above, plus:

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

Fundraiser contributing \$5,000+

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).

The Process

Before Your Event

Please mail, fax or email a completed “Third-Party Fundraiser Description Form” (right side of this sheet) to Tracy Matchett, Development Coordinator, at the address below or tracy@habitatportlandmetro.org. Tracy can also answer any questions at 503.287.9529 x25.

Next Steps

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:

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

After Your Event

- Please submit all contributions along with a “Third-Party Fundraiser Summary” to Tracy Matchett at the address below.
- Be sure to thank each donor and supporter!

Third-Party Fundraiser Form

Please mail, fax or email to Tracy Matchett.

Event Information

Event Title: _____

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): _____

Event Organizers

Primary Contact: _____

Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Day Phone: _____

Other: _____

Fax: _____

Email: _____

Website: _____

Secondary Contact: _____

Title: _____

Day Phone: _____

Email: _____

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

Signature _____ Date _____

