



Habitat
for Humanity®
Sault Ste. Marie & Area

third-party fundraising guide



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GETTING STARTED



Thank you for choosing to hold a fundraising event for Habitat for Humanity Sault Ste. Marie & Area! We want your fundraising activity to be successful and we want to support you in any way we can.

Every year, third-party events raise money for people who need affordable, decent, and safe housing. From bake sales to golf tournaments to bike races – every event supports the creation of affordable homeownership.

Established in 2002, Habitat for Humanity Sault Ste. Marie & Area is a nonprofit organization working toward a world where everyone has a decent place to call home.

Habitat for Humanity brings communities together to help families build strength, stability and independence through affordable homeownership. With the help of volunteers and Habitat homeowners, we provide a solid foundation for better, healthier lives in our service area, in Canada and around the world.

Organizing an event is a fun and fulfilling experience. This toolkit was created to help you execute a successful fundraising event.

Thank you for your support of Habitat for Humanity Sault Ste. Marie & Area.

HOSTING YOUR EVENT

Hosting a fundraising event is a fun and easy way to support Habitat for Humanity Sault Ste. Marie & Area. When you host an event to benefit Habitat for Humanity Sault Ste. Marie & Area, you'll help provide decent, affordable, and safe homes for local families and create a positive impact within the community.



Types of Events

There are lots of different ways to support Habitat for Humanity Sault Ste. Marie & Area. Here are a few examples of different events you can host:

- **Galas/Parties:** Host a gala, dinner party, concert, fashion show, BBQ, craft party, paint night, or picnic
- **Sporting Events:** Gather your friends and organize a run/walk, off-road race, bike event, mountain climb, scavenger hunt, or tournament
- **Product Sales:** Capitalize on your unique talents and passions through jewelry sales, food fairs, garage sales, car washes, bake sales, and craft sales
- **“In Lieu of” Events:** Have guests make a donation to Habitat for Humanity in lieu of gifts for birthdays, graduations, bridal showers, weddings, bar and bat mitzvahs, or any other occasion

Event Details

Once you know what kind of event you'll be hosting, you'll need to choose an event name, date, time, and venue. When selecting your event date, make sure you consider which dates would be most convenient for attendees and consult a calendar to avoid booking your event on scheduled holidays.



Registering Your Event

Please fill out our Third Party Fundraising Agreement Form and submit it to Habitat for Humanity Sault Ste. Marie & Area. Once we have key information about your event, we can promote it on our website, ReStore, and on social media!

Creating a Budget

It's important to create a financial goal for your event, as well as plan for appropriate expenses. We've created some templates to help track spending in the Budget section on p. 7.



Promoting Your Event

Now that your event details are established, you need to reach out to the community! There are lots of free ways to promote your event and increase attendance and revenue:

- Contact your local media (newspaper, radio, and TV station - we have lots of good contacts!)
- Share it on social media! Leverage free platforms, like Facebook, Twitter, Instagram, and Youtube to help reach out to the community and share information about your event
 - Keep in touch with us on our social media so we can help promote your event too!
- In all promotions, ensure you include all of your key event details (date, time, place, cause), why you have created this event, how you decided to support Habitat for Humanity Sault Ste. Marie & Area, and why it's important to your community



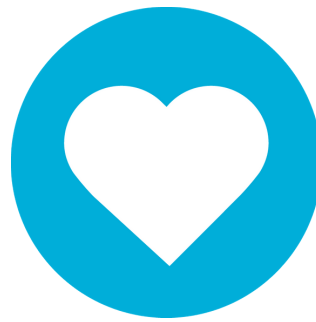
Executing Your Event

To help your event run smoothly, organize a committee, create a detailed event plan and assign tasks to execute your event. It's best to create this plan in advance and ensure you have enough staff/volunteers to ensure a successful event.



Thank Your Participants

The people who support and attend your event are key to your event's success. Make sure you take the time to thank all of your participants, as well as your committee and volunteers. You can also let your participants know how much money was raised and any plans for future events. You can thank people through in person or through a letter, an email, or on social media.



Donating Event Funds

After your event, Habitat for Humanity Sault Ste. Marie & Area requires that proceeds are issued within 30 days. It is important to submit the funds and appropriate reporting within this deadline to ensure proper tax receipting.

Aria donated all of her money that she earned through her lemonade stand to help families afford decent housing. Thank you for your donation, Aria and John of JL Builders!

BUDGET

When organizing an event, you will generate revenue (through registration fees, donations, sales, etc.) and also may incur expenses (from printing, catering, entertainment, etc.).

It is important to maintain a list of your generated revenue and expenses, to help Habitat for Humanity Sault Ste. Marie & Area issue receipts appropriately and to keep accurate financial records of your event.

Below is a budget template to get you started on outlining your estimated revenue and expenses and track them against the actual revenue and cost of the event.

REVENUE	Projected	Actual
Line 1 (E.g. Sponsorship)		
Line 2 (E.g. General Donations)		
Line 3 (E.g. Ticket Sales)		
Total Revenue (A)		
EXPENSES	Projected	Actual
Expense Item 1 (E.g. Printing)		
Expense Item 2 (E.g. Venue)		
Expense Item 3 (E.g. License Fees)		
Total Revenue (B)		
	Projected	Actual
Balance		

HOW WE CAN HELP



We want your fundraising / awareness activity to be successful and we will do what we can to make that happen.

Resources

We can provide our high quality images of our logo for use in promotional materials (brochures, posters, website, etc.) for your event. We may also be able to offer other resources such as brochures, advice on event planning, or speakers from Habitat for Humanity Sault Ste. Marie & Area!

In addition, we can provide a letter of authorization to validate the authenticity of the event or promotion as a fundraiser for Habitat for Humanity Sault Ste. Marie & Area, assist you in designating your contribution to a specific area of the organization, and provide charitable tax receipts to donors.

Promoting Your Event

We can help to promote your event by creating an event listing on our website and social media, and even getting in touch with our contacts in the news media!

If you would like your event promoted on our website, please provide the following information well in advance of the desired posting date:

- Name, date, time and location of the event
- Contact information including name and phone number/email address
- High resolution image that represents your event
- Short description about the event (3-5 sentences)

Key Messages

The following are key messages for Habitat for Humanity Sault Ste. Marie & Area. You can use these messages to develop event communications materials and connect your audience to the cause. If you require further information or key messages on a specific project, please contact us.

- **Our Mission:** We bring communities together to help families build strength, stability and independence through affordable homeownership.
- **Our Vision:** A world where everyone has a safe and decent place to live
- **Our Values:**
 - Housing for Everyone
 - Human Dignity
 - Partnership
 - Faith in Action
 - Diversity and Inclusiveness



Habitat for Humanity[®]

Sault Ste. Marie & Area

POST-EVENT CHECKLIST



Wrapping Up

Congratulations! Your fundraising event has taken place and was a successful one. Thank you for putting in all of that work for a good cause.

We have listed items below to help you pull together the information that Habitat for Humanity Sault Ste. Marie & Area will require to issue receipts and document your event appropriately.

Financial Tracking Sheets

- Budget Tracking Template with itemized totals of revenue received and expenses

Cheques/Cash Donations

- Completed Revenue Tracking Template with donor names, complete addresses and donation amounts
- Cheque(s) made out to Habitat for Humanity Sault Ste. Marie & Area
- Cash with the total amount counted and verified
- Credit card information complete with expiry date, name on card, amount to be charged and phone number of the donor

Gift In-Kind Donations (if applicable)

- Completed Gift In-Kind Tracking Template with donor names, complete addresses with contact information and the retail value listed on each item
- Official invoice or receipt for each gift in-kind item received that would like to receive a tax receipt issued for the item donated

Photos

We'd love to see your photos and show off your event's success on our social media, newsletter, and website! Please send high-quality images (.jpeg, .tiff, .bmp, .gif) to us with permission to share.

THANK YOU

We are extremely grateful for the work and dedication required to put on a fundraising event. Revenue raised by the generosity of event organizers helps fuel everything we do. Proceeds raised from your event will help improve the quality of life for local families.



CONTACT US

Should you have any questions or require clarification on any details in this booklet, please do not hesitate to contact us:

Habitat for Humanity Sault Ste. Marie & Area
111 Elgin Street, Suite 303
Sault Ste. Marie, ON P6A 6L6

Pauline Pennett, Resource Coordinator
705-941-9646 ext.224
pauline@habitatsault.ca



APPENDIX



Thank you for supporting Habitat for Humanity Sault Ste. Marie & Area. We want your fundraising / awareness activity to be successful and we will do what we can to make that happen, including:

- Offer advice on event planning;
- Provide resources such as the Habitat for Humanity Sault Ste. Marie & Area (HFHSSMA) logo, brochures, speakers, etc.;
- Provide a letter of authorization to validate the authenticity of the event or promotion as a fundraiser for HFHSSMA; Assist you in designating your contribution to a specific area of HFHSSMA; and,
- Provide charitable tax receipts to donors who make a minimum \$20.00 tax-deductible donation through HFHSSMA. Please record donations on a HFHSSMA donation form.

Guidelines:

Please submit a Third-Party Fundraising/Awareness event application no less than two weeks prior to the proposed fundraising activity. Approval will be granted on a per event/promotion basis. Applicants must reapply annually for approval. We review the application to make sure that the fundraising activity complements the mission of HFHSSMA and enhances the current, positive image of HFHSSMA.

HFHSSMA is responsible for all fundraising and/or awareness raising events for HFHSSMA. HFHSSMA's name and logo are registered trademarks and permission must be given by HFHSSMA to use the name and logo in conjunction with your event or promotion. Once approved and if appropriate, HFHSSMA will provide a copy of the logo via e-mail. HFHSSMA must approve all advertising, marketing, and/or publicity that is intended for an external or public audience prior to distribution. Copies of your external public promotional materials should be submitted to marketing@habitatsault.ca. HFHSSMA reserves the right to withdraw the use of its name at any time.

The event or promotion name must be followed by "In support of", or "Proceeds to" followed by the HFHSSMA logo. For example, it is recommended that the title or name of the event should appear as "Golf tournament in support of Habitat for Humanity Sault Ste. Marie & Area". The event name "Habitat for Humanity Sault Ste. Marie & Area Golf Tournament" cannot be used. Use of HFHSSMA "Proud Supporter" logo is permitted for Third Party Fundraising events. Publicity may not imply that the event is sponsored or co-sponsored by HFHSSMA or that HFHSSMA is involved as anything but as the beneficiary.

HFHSSMA does not permit the following types of fundraising in a third-party context:

- Programs that raise money on commission
- Events that encourage/involve behavior that is counter to the HFHSSMA mission and/or programmatic activities
- Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity
- Direct solicitation (including, but not limited to, door to door canvassing, telemarketing or internet)

The public should be informed how HFHSSMA will benefit from the event or promotion. If HFHSSMA will not receive all the proceeds, then the exact percentage that benefits HFHSSMA must be stated clearly on all related publicity. HFHSSMA must be notified if another organization will benefit from this event.

For example:

- "All proceeds go to the Habitat for Humanity Sault Ste. Marie & Area"
- "All proceeds go to Habitat for Humanity Sault Ste. Marie & Area"
- "A portion (for example 50%) of the ticket price will be donated to the Habitat for Humanity Sault Ste. Marie & Area"
- "A portion (for example 50%) of the ticket price will be donated to "Habitat for Humanity Sault Ste. Marie & Area."

HFHSSMA is not financially liable for the promotion and/or staging of third-party fundraisers. The volunteer event organizer will obtain all permits and insurance. The volunteer event organizer agrees to handle all monetary transactions and present the proceeds to HFHSSMA within 30 days of the event. Under no circumstances will third party revenues and expenses flow through HFHSSMA.

HFHSSMA is committed to protecting the privacy of personal information about its volunteers, donors and other supporters. During running your event, personal information (such as addresses and phone numbers) from donors may be acquired. This information is always to be kept confidential, and only given to a HFHSSMA staff person and will not use acquired personal information for any purposes other than those related to the event unless prior consent has been obtained.

Charitable donation receipts will only be issued in accordance with the Canada Revenue Agency guidelines. The final decision to issue official donation receipts rests with HFHSSMA. Not all funds raised qualify for tax receipts. Please clarify details of your event and the receipts you would like to offer with HFHSSMA prior to your event.

HFHSSMA and all related entities are not liable for any injuries sustained by event volunteers or participants related to an event benefiting HFHSSMA and cannot assume any type of liability for your event. The organizer of the fundraiser or promotion event that is the subject of this agreement shall indemnify and hold harmless HFHSSMA, its officers, directors, and employees, from and against any and all claims, liabilities, costs, fines and expenses (including reasonable legal fees) arising out of any claims or suits, or threats of suits, which may be brought against HFHSSMA for any reason related to the third party fundraising event. The organizer's obligations here-under shall survive the termination of this agreement.

Donation Receipting Financial Donation

HFHSSMA will issue donation receipts for income tax purposes for any cash, cheque donation of \$20 or more. If an individual has donated, the receipt will be issued in the name of that individual at their home address. If a corporation has made the donation, and if a tax receipt is requested, the receipt will be issued in the company name at their corporate address. An individual or corporation cannot receive a donation receipt for money that was not donated by them (i.e. an individual cannot be designated to receive the donation receipt for monies they raised, only monies they donated themselves

Tax receipts cannot be provided if the donor received a benefit in return for the donation, e.g. an opportunity to win a prize, purchase a product, or a benefit included in the price of admission such as dinner or golf. In the latter example, receipts could be provided for any amount that is over and above the fair market value of the benefits received assuming the value of the benefits does not exceed 80% of the price of admission.

Any individual or business donors requiring tax receipts should have their donor details and donation amount included on a HFHSSMA donation form.

Monthly donations, whether made directly with HFHSSMA, or made through payroll deductions will be receipted annually.

In Kind Donations (i.e. prizes, product) A tax receipt can be issued for donations of in-kind equal to the fair market value of the property donated. To process in kind donations, CMHA LK needs a written invoice or other supporting documents that could ascertain the Fair Market Value of the in-kind donation. Gift certificates and services are not eligible for tax receipts

Corporations or businesses that agree to sponsor an event will receive an invoice or Thank You letter from HFHSSMA enabling them to claim back the full amount of their sponsorship as a marketing expense.

Third Party Fundraising Application

Event Name:

Date of Event:

Description:

Event Venue:

Main Contact:

Contact Phone:

Contact Email:

Number of attendees expected:

Do you require any HFHSSMA staff or volunteers to be present at the event? Yes No

If yes, how many:

Fundraising Goal:

Percentage to HFHSSMA:

I have read and agree to follow the Third-Party Fundraising Terms and Conditions set up by Habitat for Humanity Sault Ste. Marie & Area:

Signature of Applicant

Date

Signature of HFHSSMA Representative

Date
