



Third-Party Host Fundraising Event Guidelines

The tenants, staff, and Board of Directors of Homes First thanks you for your interest in hosting an independent third-party fundraising event to benefit affordable rental housing in our community. Events such as yours are important in the Homes First's efforts to raise funds and awareness of the need for safe, healthy, and affordable housing for everyone.

In addition to third-party fundraising events Homes First has one major fundraising event every year called Heroes for Housing.

As you read these guidelines, please don't get scared away! It's really not that hard to ensure you have a great event to support Homes First and that Homes First mission and reputation are protected! Questions? **Call 360-915-8176 and Marge will make your generosity as easy as possible.**

Please Note: The following fundraising activities are prohibited in conjunction with third-party event for the benefit of Homes First:

1. Programs that raise money on commission;
2. Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity; and
3. Direct solicitation (including but not limited to door-to-door canvassing or telemarketing).

Also of note is that if Homes First believes that an association with your event or any consequences that contribute to or result from your event may have a negative effect on the mission, credibility, or reputation of the Homes First, we will ask you to withdraw any and all use of the Homes First name in association with your event.

THIRD-PARTY EVENT GUIDELINES

I. Promotion and Logo Usage

- a. Homes First has no fiduciary responsibility for your event(s) and assumes no liability for its planning or execution, including all promotion, set-up, staffing (including volunteers), or the collection and management of funds/donations.
- b. You may request the use of an electronic-format logo ("have fun, do good, end Alzheimer's" graphic), which you may freely use in the promotion and carrying out of your event. You are strictly prohibited, however, from using any other trademark, service mark, logo or copyrighted materials of the Association for your event(s) without the express written consent of the Association.

- c. Homes First does not endorse products, firms, organizations, individuals, or services. Accordingly, your event(s) must be promoted and conducted in a manner that avoids any statement or appearance of an endorsement by Homes First.
- d. All promotional materials must clearly state that your **event is raising funds that will benefit Homes First rather than an event hosted by The Homes First**, and include the percentage or amount that will be donated to Homes First.
- e. The Homes First staff role is to support approval of third-party events. Homes First can also provide logos, materials, and other supporting documents as appropriate. **Staff typically do not attend third-party events due to multiple existing obligations annually.** Homes First will not solicit sponsors or auction items for your fundraising event—and does not provide any donor, volunteer, or celebrity contact information, mailing lists, press contacts, press releases, or formal advertising.

II. Finance and Tax Rules

Homes First will process only the final net proceeds of event(s). Under no circumstances will third-party event revenues and expenses flow through Homes First.

Homes First must receive all net proceeds within (30) business days of the conclusion of each event and/or promotion. The event host will also provide Homes First a completed *Host Report Form* recording the net donation and individual contributions.

Only your individual donors who have written checks to the Homes First will receive an official acknowledgement from the Homes First.

- a. You may not establish a bank or other deposit or transaction account in the name of Homes First. If payments are made to the organizer, and the event organizer is not an IRS qualified organization, the payments will not be deductible for income tax purposes. If the payments are made to Homes First, donations to Homes First are typically tax deductible, though you should consult your tax advisor.
- b. Homes First sales tax exemption(s) (on purchases) cannot be extended to any event or fundraising effort.
- c. In keeping with fundraising standards, no more than 25% of gross revenue from the event may be spent on event expenses. At least 75% of gross revenue must go to Homes First, and all material publicizing the event must list the percentage that Homes First will receive. For example, promotional/marketing materials should state, “Homes First will receive at least 75% of the proceeds collected for this event.”

III. Collateral and Communications

- a. Invites, press releases, brochures and all other written communication must be approved by Homes First before printing or going live via the internet.
- b. If there is an error in the print material(s), without approval from Homes First, Homes First has the full authority to request reprints and/or revisions, at the financial expense of the event host.

IV. Liability and Cancellation

All third-party events must:

- a. Comply with all federal, state and local laws applicable to any event, including fundraising rules and regulations.
- b. Determine the extent of and obtain its own liability insurance for the event sufficient to cover any claim that may arise out of the event. *Homes First will not provide our liability insurance for third-party events regardless of special circumstances that may arise.* The third-party event organizer agrees to indemnify and hold Homes First harmless from and against any and all losses, damages, costs, attorney's fees, expenses, and liabilities incurred in connection with, or with the defense of, any claim or action or proceeding arising out of or incurred in connection with the event.
- c. Obtain all permits and/or licenses necessary for fundraising in the city in which the event is to occur, the sale or service of liquor, and the hosting of raffles and/or games of chance.
- d. Homes First's Development Director must see all copies of permits and approve them prior to approval of the event.
- e. A letter from the main point of contact at the venue or host of the event [confirming agreement with the event date, time, and location of the event; as well as understanding that the event is third-party hosted by an independent event host] is required to be presented for Homes First's Development Director prior to approval of the event.
- f. Inform invitees and participants that the event is not produced, supervised or sponsored by Homes First and that Homes First is neither responsible nor liable for any acts or omissions related to the event.

V. Media

- a. Homes First needs to be informed of and approve all press and media coverage for third-party events.

VI. Miscellaneous

You, as the third-party independent event organizer, must register your event 30 business days in advance with Homes First by accepting these Guidelines.

I accept and agree to abide by the terms of these guidelines with respect to my Event (s) to Homes First. I hereby release and agree to indemnify and defend Homes First, its officers, directors, employees and agents, from and against any and all claims, loss, liability, damages and expenses (including reasonable attorney's fees and other costs of litigation) imposed against or incurred by Homes First arising out of or related to any event I host or any violation by me of these Guidelines.

Name: _____

Signature: _____

Date: _____

Please return the signed guidelines with applicable permits and letters from event venues/hosts confirming the event time, date, and location (see section IV) to:

Homes First
Attn: Development Director
5203 Lacey Blvd SE, Ste.A, Lacey, WA 98503

Or email to: openingdoors@homesfirst.org 360-915-8176

Upon receipt of your completed forms, you will receive an official letter from Homes First signifying our receipt of your signed guidelines and agreement form, indicating approval of your third-party event.

If Homes First has questions or needs clarification regarding your third-party event, a representative will be in touch with you via telephone and/or email for further clarification,

*You will also receive a post-event Host Report Form and return envelope for ease of turning in your collected contributions.

>>If you would like for an Homes First Representative to accept donations from your third- party event in person, such as a through a check presentation, Homes First will need four (4) to six (6) weeks notice of the desired date from the event organizer—to ensure a representative will attend.

INTENT TO HOLD A THIRD PARTY EVENT FOR HOMES FIRST

Organization and Contact Person Information

Organization Name/Address: _____

Or check here if applicable: ___ Not an "organization" – We are a group of individual volunteers holding event.

Contact Person Name/Address: _____

Your Relationship to Organization Holding Event: _____

(e.g., employee of organization holding event – give title; or volunteer of organization)

Contact Person:

Phone: _____

Cell Phone: _____

Email: _____

Fax: _____

If more than one contact person for Event, please provide in the spaces above the information for the additional contact person.

Organization or Volunteer Group's relationship to Homes First : _____

If you are already working with a staff member at Homes First (a Development Officer for example), please provide name: _____

Event Information

Date: _____ **Time:** _____

Location (city and venue): _____

Briefly describe the event: _____

How will funds be raised? Please circle all that apply:

Ticket/Table sales *** Silent or Live Auction *** Direct Donations *** Other: _____

Please be advised that raffles/games of chance require a license and strict laws apply to marketing & operation of raffles to raise funds. Purchase of raffle/gaming tickets is not tax-deductible. We suggest you obtain appropriate legal advice before selling raffle tickets.

Cost per person to attend event? _____

Cost to purchase table? _____

Alcoholic Beverages Served/Sold at Event? _____

Security Provided at Event? _____

What percentage of the event proceeds are to be designated for Homes First? _____

Will any other organization also receive a percentage of the event proceeds? Yes ___ No ___

(If yes, please state the other organization(s) and percentage(s): _____

Submitting Your Donation: All event proceeds should be made payable in a single check made payable to Homes First, or through our online giving portal. Please let us know if online giving is of interest and get you set up.

Remember: You must obtain approval from our Development Director prior to the printing, production, distribution or publication of any materials containing the Homes First name or logo. Homes First must review all materials in which our name or logo appears. If you plan to use the Homes First logo, including the logo our Director of Development will send you an appropriate and up to date file.

By signing below, you acknowledge that you have received, read, understand and agree to the Homes First Third Party Event Guidelines and that you are authorized to sign on behalf of your organization.

Signature of Organizer

Printed Name and Title: _____

Date: _____

TO BE COMPLETED BY HOMES FIRST AND RETURNED TO THIRD PARTY ORGANIZATION

APPLICATION APPROVED BY HOMES FIRST

Date: _____

Printed Name and Title: _____

* * *

Director of Development _____

Printed Name: _____

Signature: _____