



Habitat for Humanity Heartland Ontario's missions is: to mobilize volunteers and community partners in building affordable housing and promoting homeownership as a means of breaking the cycle of poverty. Our vision is: a world where everyone has a safe and decent place to live. Our values are the cornerstone of our commitment, we believe in housing for all, we believe in the worth and dignity of every human being, we believe we can best achieve our mission through meaningful and mutually beneficial partnerships, and we believe there is a role for everyone committed to our vision, mission and values...we believe in diversity and inclusiveness to enrich our organization.

### Special Event 3<sup>rd</sup> party Checklist

Event Name: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Location: \_\_\_\_\_ Budget: not applicable

Person Responsible: \_\_\_\_\_

Phone: (Day) \_\_\_\_\_ (Evening) \_\_\_\_\_ E-Mail: \_\_\_\_\_

Done	Action	Notes	Due Date	Person Responsible
<b>General</b>				
	Determine approval for event through Habitat for Humanity staff members			
	Determine event basics – what, where, when, why, who			
	Determine appropriate sponsors to approach for event Donations and Sponsors			
	MOU (Memorandum of Understanding) information sheet to be filled out for all sponsors donating time/material/funds			
	**Tax receipts only available to donors with approved paperwork and approval from Habitat for Humanity Heartland Ontario's Staff.			



<b>Program Details</b>				
	Map out detailed event timing			
	Determine required permits and get them if applicable			
	Identify any transportation/parking needs			
	Book sound system if required			
	Arrange for photos - ALWAYS			
<b>Promotion</b>				
	Develop promotion plan			
	Develop e-mailing/contact list with opt-out option, for the anti spam legislation. Before you email anything on behalf of Habitat for Humanity Heartland Ontario 3 <sup>rd</sup> party events, always remember to include the ASL (anti-spam legislation) consent form with your email. Please leave your email contact information before you leave, and we will send you the attachment			
	Draft invitation (with RSVP contact) if required			
	Habitat for Humanity Heartland Ontario has a collection of printed marketing material for you to use for your event. Just call me and we will design or send you what we have available. 519-455-6623 ext 228			
	Implement promotion plan in accordance with Habitat for Humanity Heartland Ontario mission: see heading			



<b>Event Staffing/Volunteers</b>				
	Identify volunteer/staffing needs			
	Determine volunteer shifts			
	Orient/train volunteers if required			
<b>For Event day</b>				
	Arrange arrival times for volunteers and access to venue			
	Compile contact list for helpers			
	Pack "special event kit" with tape, scissors, pens, paper, etc.			
	Check arrangements for garbage disposal and other clean up			
	Check any special parking arrangements			
<b>After the Event</b>				
	Complete clean up			
	Return all rented and other materials to appropriate personnel			
	Reconcile event - submit all donations to Habitat for Humanity Heartland Ontario within 30 days after the event.			
	Thank all helpers (including businesses, etc. who helped promote the event)			
	Review event for successes, improvements needed with Habitat for Humanity Heartland Ontario			



Memorandum of Understanding (MOU) Information Sheet

Generated by:

Date:

Name (Hosting Fundraiser):

Contact Person at event:

Address:

City and Postal Code:

Office Phone:

Mobile:

Email:

**Event:**

Name of sponsor/donor;

Address of sponsor/donor:

Details: of sponsorship/donation/in-kind gift

Value of sponsorship/donation/in-kind gift

\*\*Value amount needs to be backed up by proper documentation – as per the [CRA guidelines](#)

Tax receipt required?

Yes

No

Paperwork received for Receipt?

Yes

No



## Charitable Tax receipt Guidelines

Charitable tax receipt is given to individuals or groups who make a donation to a registered charity.

The donation must be made directly to Habitat for Humanity Heartland Ontario, without personal return.

One will not receive a tax receipt if purchasing a ticket to an event, buying an auction item or a raffle ticket

If a donation is eligible and a tax receipt is required, we will provide one for all donations of \$20.00 and over with the appropriate paperwork.

Processing receipts are done on a quarterly basis.

Gifts in Kind are gifts of property, other than cash and marketable securities. These include but are not limited to: supplies, equipment, books and art. Gifts in kind that are professional/personal gifts from an individual or company may be receipted for the value of the product only.

For gifts in kind of service, please connect the donor with a Habitat for Humanity Heartland Ontario Administration Staff to ensure proper [CRA guidelines](#) are followed for receipting purposes.

**When in doubt always ask before you promise a tax receipt!**

# A Donor Bill of Rights

**PHILANTHROPY** is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

## I.

*To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.*

## II.

*To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.*

## III.

*To have access to the organization's most recent financial statements.*

## IV.

*To be assured their gifts will be used for the purposes for which they were given.*

## V.

*To receive appropriate acknowledgement and recognition.*

## VI.

*To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.*

## VII.

*To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.*

## VIII.

*To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.*

## IX.

*To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*

## X.

*To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.*

### DEVELOPED BY

AMERICAN ASSOCIATION OF FUND RAISING COUNSEL (AAFRC)  
ASSOCIATION FOR HEALTHCARE PHILANTHROPY (AHP)  
COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION (CASE)  
ASSOCIATION OF FUNDRAISING PROFESSIONALS (AFP)

### ENDORSED BY

(IN FORMATION)  
INDEPENDENT SECTOR  
NATIONAL CATHOLIC DEVELOPMENT CONFERENCE (NCDC)  
NATIONAL COMMITTEE ON PLANNED GIVING (NCPG)  
COUNCIL FOR RESOURCE DEVELOPMENT (CRD)  
UNITED WAY OF AMERICA