



## **GUIDE TO THIRD PARTY FUNDRAISING**

**Thank you for your interest in helping our organization!  
Deborah's Place relies on the willingness of many individuals and  
organizations that generously initiate fundraising events and activities  
to raise money in support of our mission.  
We are grateful for your help!**

### **What is a Third Party Fundraiser?**

A Third Party Fundraiser is any event which is planned, hosted, and staged by someone other than Deborah's Place staff or Board as a group. The event planner and host might be an individual, a group, or an organization which wishes to support Deborah's Place by raising funds or soliciting in-kind support or donations from others.

Third Party Fundraisers can be as complex as a golf tournament or outing or as simple as a wine tasting party at home or a planned girls' night out with a fundraising focus. The key to the definition of these events is that they are planned, hosted, and managed outside the Deborah's Place structures and that they aim to bring in funds to support the programs of Deborah's Place.

### **Why Third Party Fundraising?**

Third Party Fundraising is a creative and individualized way to help Deborah's Place supporters in the community do their own thing to support the mission and programs of Deborah's Place. We might not all be able to write a check for \$10,000, but each of us can gather some friends, reach out to colleagues, publicize an event in our neighborhood or community and can work together to raise money for Deborah's Place in our own way.

Third Party Fundraising is a wonderful way to get the word out about Deborah's Place and expand the circle of support for the women in our programs even further.

### **How Does Third Party Fundraising at Deborah's Place Work?**

The following pages in this packet will guide you through the process of planning, managing, and executing your own Third Party Event on behalf of Deborah's Place. It is important that each and every person involved in the planning and management of these events read this packet thoroughly and maintain good communication with the development staff at Deborah's Place in order to ensure that your event goes smoothly and that funds are raised in a manner consistent with the mission and core values of the organization. Thanks so much for your dedication and support!

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## **How to Use This Packet:**

We deeply appreciate the commitment and investment of time and financial resources required in the successful execution of such initiatives. In order that both Deborah's Place and the Third Party have a clear understanding of expectations in the execution of such endeavors, and so Deborah's Place can assess whether we are able to participate in the particular initiative, these Third Party Fundraising Guidelines have been developed to steer the process.

Third Party individuals/organizations interested in donating proceeds from their events must read the Third Party Fundraising Guidelines, initial where indicated and sign as having accepted them. If initials are not provided at any point where indicated, Deborah's Place staff will contact the Third Party in order to be certain that they have read and understood the issue.

We suggest that you read through the packet carefully before deciding that a Third Party Fundraiser is what you want to do. If so, great! Start by filling out and sending in the enclosed application. You will then be contacted by a representative from Deborah's Place. Once your fundraiser is approved, the planning can begin. You will then have a wonderful event that benefits the women of Deborah's Place!

## **What You'll Find in these Guidelines:**

- Important Background on Deborah's Place Mission, Values, and Slogan
- Getting Started
- Event Ideas
- Organizer's Checklist
- Sample Budget #1 — Major Golf Classic
- Sample Budget #2 — Wine Tasting at Home with Friends
- Third Party Event Form
- Policies and Procedures
- In-Kind Contribution Form
- Donation Record Form

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## **Important Background on Deborah's Place Mission, Values, and Slogan**

Because the purpose of any fundraising event staged on behalf of Deborah's Place is to support the mission and programs of Deborah's Place, it is essential that all fundraising activities, including Third Party Events be conducted with attention to the mission and core values of the organization. It is the expectation of Deborah's Place that all Third Party Fundraising Events will be conducted in the spirit of the organization and with respect for the women who receive services in our programs.

### **Slogan:**

Deborah's Place - Breaking the Cycle of Homelessness for women in Chicago.

### **Mission:**

Deborah's Place breaks the cycle of homelessness for women in Chicago. Through a continuum of housing options, comprehensive support services, and opportunities for change provided by dedicated volunteers and staff, women succeed in achieving their goals of stable housing, sustainable income and greater self-determination.

### **Purpose:**

The value statements of Deborah's Place describe who we are. They are the result of a process which began in the spring of 1995 during a Board/Staff retreat and culminated with Board approval in May of 1996. Input was gathered from staff, program participants, volunteers, Board and Advisory Council members in an effort to articulate what's at the heart of Deborah's Place. The values apply to all aspects of Deborah's Place and promote similar values among all Deborah's Place constituents. We will use these values for recruitment and training, for program and personnel evaluation, and as a reference point in decision making.

### **Core Value Statements:**

*We seek to fulfill our mission through the expression of our core values*

- Encourage creative expression
- Support self-determination and choice
- Build community through relationships
- Deliver quality services with respect and empathy
- Honor diversity
- Advocate for affordable housing as a right

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## Getting Started!

### **Forming Your Committee:**

So you've decided that you would like to raise funds for Deborah's Place. Great! Perhaps the first question you should consider is... do I want to do this alone? The answer may be yes and that is perfectly fine. Many fundraising projects, if kept very small and simple, sometimes operate the best if done with fewer organizers.

However, if the project you have in mind involves selling tickets, tables, etc., and requires sponsors, promotions set-up and clean-up, you should consider getting others involved and form an organizing committee.

Ask friends, fellow workers and any others whom you think might like to be involved with a fundraising project. Appoint a Chair of the committee to help regulate meetings and designate responsibilities to everyone so that all have a role in the project.

### **Keep it Manageable:**

One thing to keep in mind when planning an event is getting the most out of a little. It's important to not get over extended or over commit on time or expenses.

Perhaps the number one reason why fundraisers fail is poor or, in some cases, no planning! People make hundreds of everyday plans, from planning breakfast to planning what to wear, to setting the days schedule.

Therefore it makes perfect sense that before any fundraising can begin, a plan must be formed. Questions must be asked and the answers provided at this point. The first question that should be asked is... What kind of fundraising project should we do? Here is a list:

### **Suggested Events:**

- Anniversary/Birthday\*
- Auction
- Bowl-a-thon
- Car Wash
- Casual Days (at your place of work)
- Dance-a-thon
- Golf Outing
- Skate-a-thon
- Hop-a-thon
- Ladies' Night Out
- Penny Carnival
- Sporting Tournaments
- Suitcase Party
- Sales - Baked goods, BBQ, etc.

\*In lieu of gifts at your next special event (birthday, anniversary, etc), ask guests to make a contribution on your behalf to Deborah's Place..

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## Organizer's Checklist

- Event** - Decide what type of fundraising project best fits the various environmental factors. i.e. location, participants, etc.
- Plan** - Form a committee of friends and co-workers to plan the event. Appoint a chairperson and assign individual responsibilities to other members. Set the event's goals and create an appropriate budget. Sample budgets follow to help guide you. Remember not to over commit on time or expenses.
- Date & Time** - Select a specific date and time for the event taking into account holidays and major or political events. Weekends are usually best. Don't forget to have a back-up plan for rain if planning an outdoor event.
- Location** - Choose an appropriate area - shopping malls, public parks, private homes, etc. Make sure facilities are adequate - electricity, water, wheelchair accessibility, etc.
- Licenses** - Be sure to check with local authorities (city hall, police department, etc.) to make certain permits are applied for if required. Remember six to eight weeks is needed to process almost any permit.
- Program** - If the event consists of more than one activity, plan a program and arrange for someone to be in charge of each activity.
- Tickets** - If the event will raise money through admission, try to sell as many as possible in advance. Friends, service clubs, etc. may be able to help.
- Decoration & Music** - Colorful decorations and background music will lend a festive air to the special event and will help draw public and media attention.
- Sponsors/ Prizes** - Plan ways of obtaining necessary prizes and covering expenses through sponsorships and in-kind donations. Remember, donated good and services can be written off by businesses as a promotional or advertising expense.
- Publicity** - Events won't happen unless people know about it! Posters, banners, flyers, radio and newspaper ads (public service announcements and news releases) will all help promote the event.
- Extras** - The sale of drinks, chips, cookies, t-shirts, etc. will increase revenues at any special event and may encourage people to stay.
- Donations** - Deborah's Place representatives can supply donation forms with response envelopes for use at special events. Be sure all ways of soliciting contributions have been explored.
- Pledge Forms** - Remember that participants need at least two weeks to solicit pledges.
- Clean-up & "Thank-You"** - Make sure a clean-up is planned in order to be welcomed back to the same venue for another year. Everyone who donated time, goods and services should be thanked.

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**SAMPLE BUDGET #1**  
**Major Golf Classic**

Projected Revenue and Expenses

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**REVENUE**

**GOLFERS**

|                                     |          |
|-------------------------------------|----------|
| 124 golfers @ \$500                 | \$62,000 |
| 15 golfers with Celebrity @ \$1,000 | \$15,000 |

**AUCTION**

|          |         |
|----------|---------|
| 10 Items | \$5,000 |
|----------|---------|

**SPONSORSHIPS**

|                       |         |
|-----------------------|---------|
| 9 Holes @ \$500       | \$4,500 |
| Driving Range @ \$250 | \$250   |
| Halfway House @ \$750 | \$750   |

|                       |                        |
|-----------------------|------------------------|
| <b>Total Revenues</b> | <u><b>\$87,500</b></u> |
|-----------------------|------------------------|

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**EXPENSES**

|   |          |
|---|----------|
| Course Rental Fee (Includes refreshments and lunch) | \$22,000 |
| Halfway House / Roving Cart                         | \$2,500  |

|   |         |
|---|---------|
| Golf Shirts @ \$22.00 (X150)              | \$3,300 |
| Prizes (Half paid and other half donated) | \$1,500 |

|  |       |
|--|-------|
| Photographer (including film and processing) | \$250 |
| Materials (promotions, printing)             | \$500 |
| Courier                                      | \$200 |

|                       |                        |
|-----------------------|------------------------|
| <b>Total Expenses</b> | <u><b>\$30,250</b></u> |
|-----------------------|------------------------|

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|  |                        |
|--|------------------------|
| <b>PROFIT (with proceeds going to Deborah's Place)</b> | <u><b>\$57,250</b></u> |
|--|------------------------|

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**SAMPLE BUDGET #2**  
Wine Tasting at home with friends

Projected Revenue and Expenses

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**REVENUE**

**TICKETS**

50 attendees @ \$25

\$1,250

(ticket includes a bottle of wine)

**RAFFLE**

3 Items

\$500

**Total Revenues**

\$1,750

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**EXPENSES**

60 bottles of wine @ \$4.99 per bottle

\$299.40

Promotional Material (Signs, Flyers)

\$50

Raffle Items (donated)

\$—

**Total Expenses**

\$349.40

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**PROFIT (with proceeds going to Deborah's Place)**

**\$1,400.60**



## THIRD PARTY EVENT FORM

If you or your organization wishes to sponsor a Third Party Event to benefit Deborah's Place, please submit this completed form to the External Relations Coordinator in the Development Department via mail or fax: **2822 West Jackson, Chicago, IL 60612 Fax: (773) 722-5081 Phone: (773) 638-6537**

Once the event has been officially approved, a signed copy of the attached agreement from will be forwarded to the applicant. If you have any questions concerning this application or the agreement, please call the Development Office at the number above.

Today's Date: \_\_\_\_\_

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

Name of Organization, Business or Individual: \_\_\_\_\_

Contact Person: \_\_\_\_\_

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

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

Business phone: \_\_\_\_\_ Home phone: \_\_\_\_\_

Fax: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Why did you decide to support Deborah's Place?

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How did you hear about Deborah's Place?

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Type of activity you want to do: \_\_\_\_\_

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Date of activity: \_\_\_\_\_

Official Name of activity: \_\_\_\_\_

Location: \_\_\_\_\_

Brief description of the event: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please outline your strategy:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Estimated income from the event: \_\_\_\_\_

Estimated expenses for the event: \_\_\_\_\_

Estimated proceeds to Deborah's Place: \_\_\_\_\_

Guaranteed donation to Deborah's Place: \_\_\_\_\_

Cancellation Plan:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you intend to use the name and logo of Deborah's Place in your printed materials and in your publicity?

Yes  No

**ALL PRINT MATERIALS FEATURING THE NAME OR LOGO OF DEBORAH'S PLACE MUST BE APPROVED BY THE DEVELOPMENT DEPARTMENT.**

How will you promote the event?:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What support do you require from Deborah's Place? *Please note, staff time is limited.*  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Will you need any of the following? *Give quantities where applicable.*

- Printed/promotional materials relating to Deborah's Place.
- Logo
- Brochures : \_\_\_\_\_

# GUIDE TO THIRD PARTY FUNDRAISING

## Policies and Procedures

If you wish to help fight against homelessness by holding a Third Party Event with the proceeds being donated to Deborah's Place, we ask you follow these guidelines. Please read the information and place your initials where indicated.

### **Policies:**

Deborah's Place welcomes special fundraising and promotional events sponsored by outside individuals/organizations on its behalf. Such events or promotions must be consistent with the Deborah's Place Mission Statement, which can be found on the first page, and maintain a positive image for the organization.

Third party events must have monetary and other benefits to the organization and must include one or more of the following:

- A) support of the organization's mission
- B) create public awareness for Deborah's Place and/or homelessness
- C) encourage volunteerism

### **Preliminary Guidelines:**

Special events sponsored by third parties need to be approved by Deborah's Place ahead of time. Approval shall be based on the following criteria:

1. The event must be consistent with the organization's mission statement and core values.
2. The event must have net financial profitability and positive public relations value.
3. The event must meet Deborah's Place Staff and volunteer requirements.

### **Standards:**

As a result of your association with Deborah's Place, all activities, both positive and negative, Reflect not only on your event but also on Deborah's Place.

The following standards are designed for the uniform presentation of Deborah's Place programs and services:

1. Any use of the name or logo of Deborah's Place must be agreed to in writing prior to the launch of the event. This includes, but is not limited to, all promotional materials including brochures, flyers, advertisements, publicity or media communications. \_\_\_\_\_Initials

2. The full and proper name Deborah's Place must be used. \_\_\_\_\_ Initials
3. When promoting the event, please ensure that somewhere on all written materials, the words "All Proceeds go to Deborah's Place" appear. \_\_\_\_\_ Initials
4. The Deborah's Place official slogan should be used when possible. It is "Breaking the Cycle of Homelessness" \_\_\_\_\_ Initials
5. Deborah's Place will incur no costs or losses on behalf of the third party organizer unless agreed to, in writing, prior to the event. \_\_\_\_\_ Initials
6. All staffing of the event will be the responsibility of the organizers, unless agreed to in writing, prior to the event. \_\_\_\_\_ Initials
7. Third party requirements involving licenses and fees must conform to government regulations. Adequate time must be allocated. \_\_\_\_\_ Initials
8. All money, records and requests for receipts for income tax must be turned over to Deborah's Place within thirty (30) days following the event. In order for Deborah's Place to generate a tax receipt, donor information must be clear and complete. (Forms are included in this packet for this purpose.) \_\_\_\_\_ Initials
9. The sponsoring person/organization agrees to handle all monetary transactions for the special event or promotion and to present the proceeds to Deborah's Place within thirty (30) days of the completion of the event or as agreed in writing to Deborah's Place. Attached to the payment, should be a list of donors and donations of materials and supplies. (Formats of these lists are provided in this packet). \_\_\_\_\_ Initials
10. The Third party agrees to ensure that all materials borrowed are returned promptly and in the same condition they were received. The sponsoring organization/group agrees to accept responsibility for damage or loss of materials borrowed from Deborah's Place. \_\_\_\_\_ Initials

**Recognition:**

11. Deborah's Place will support your event on our website. 90-day advance discussion is required. \_\_\_\_\_ Initials
12. Deborah's Place may include your events in any of our publications. A brief report and photographs would be appreciated. \_\_\_\_\_ Initials.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
 (Individual/Organization/Group)

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
 (Deborah's Place)



By law, Deborah's Place is required to track the value of our in-kind donations. Donations valued at over \$5000 require documentation from a professional appraiser. Deborah's Place cannot guarantee that your donation will be fully tax-deductible. Thank you!

## IN-KIND CONTRIBUTION FORM

Photo copy as needed/To be submitted by the Third Party with payment of donation.

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

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

### DONOR INFORMATION:

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

Organization: \_\_\_\_\_

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

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

Telephone Number: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

### CONTRIBUTION INFORMATION:

Description of Item (s) contributed: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

| Item and Quantity: | Cost Per Item: | Market Value of Contribution: |
|--------------------|----------------|-------------------------------|
|                    |                |                               |
|                    |                |                               |
|                    |                |                               |
| Total              |                |                               |

Donor Signature: \_\_\_\_\_



