

# guidelines



## Thank you for taking the first step by obtaining your Third Party Fundraising Event Kit!

Big Brothers Big Sisters of the Ocean State relies on the willingness of many individuals and organizations that generously initiate fundraising events and activities to raise money in support of our programs and services, fostering positive self-esteem and competency in children in Rhode Island by providing and promoting friendship, guidance and encouragement. We appreciate the commitment, gift of time and financial resources required to host such an initiative. In order to assist you with the planning and execution of a successful event, we ask that you read the enclosed Third Party Fundraising Event Guidelines and Agreement Form. Then, Step 2 is to take a peek and give us the “two thumbs up” with your signature of approval.

### Does your event idea meet Third Party Fundraising Event Criteria?

#### What is a Third Party Event?

Third Party Fundraising Events can be defined as any fundraising initiative brought forward by an individual(s), community group, service club, or business external to Big Brothers Big Sisters of the Ocean State, and/or an employee, who wishes to raise money through a planned activity that is designed, managed and financially resourced by the external participants.

#### Third Party Event Checklist

In order to ensure there is a match between Big Brothers Big Sisters of the Ocean State and your organization, the following criteria will be considered in the review and acceptance of your fundraising event proposal:

- Read the guidelines
- Accept Agreement and return it to BBBSOS
- Submit Proposal
- Call/Email BBBSOS to confirm Event

If yes, let's get started!

Please complete the enclosed documents and submit to:  
Tina Santos, Development and Communications Manager  
T: 401.921.2434 ext. 104 / Address: Noted below.  
E: TSantos@bbbsos.org



**Big Brothers Big Sisters**  
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Thank you for choosing Big Brothers Big Sisters of the Ocean State (BBBSOS) as a recipient of your fundraising event. Community support is the key to our success and we recognize the efforts it takes to organize and hold an event on our behalf. Hence, in order to help your event run more smoothly we have created this Third Party Fundraising Event Kit for fundraising events held on behalf of BBBSOS, complete with guidelines and worksheets. We ask that you read these guidelines, and later fill in the agreement form. Should you have any questions, please do not hesitate to contact our office at 401.921.2434 ext.104.

*This application must be approved by Big Brothers Big Sisters of the Ocean State prior to publicizing or holding the event. Where possible, please submit at least **1 month prior to your event.***

### **What Big Brothers Big Sisters of the Ocean State requests of third party event organizers:**

- Contact BBBSOS to register new events or update us on continuing events. It is important that our agency is aware of all events that are held in support of our programs.
- It is the event organizer's responsibility to communicate to sponsors, participants and the general public that BBBSOS is not conducting the event, but is the beneficiary of the event.

### **BBBSOS can provide the following assistance once your event has been approved by our office:**

- Advise and expertise on event planning.
- Attendance of a BBBSOS representative, when appropriate and available.
- Event listing on our website and/or social media platforms.
- An agreement and endorsement letter that validates the authenticity of the event/organizer, from date of issue until the event is complete.
- Limited supplies, such as information brochures, signage and other promotional material. **(BBBSOS is**

### **unable to provide the following:**

- Funding or reimbursement for event expenses.
- Donor or Sponsor lists.
- Promotion or advertising of your event except on our website and/or social media platforms.
- Guaranteed attendance of staff and volunteers at your event.
- Application for gaming licenses, e.g., bingos, raffles, liquor, insurance.
- Prizes, auction items, awards.
- Tax receipts for cash or in-kind goods that were not directly received by BBBSOS.

(Please also see information on tax receipts)



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### Other Guidelines:

- All Third Party Events require completion and approval of a Third Party Event Agreement Form.
- To conduct an event, we request that you complete an application to share your event plans. You may use an alternate format, but please cover all the applicable areas in the application. Once you submit your proposal, we will review it and respond within one week. This form can be found by visiting [BBBSOS.org](http://BBBSOS.org), clicking 'Get Involved' on the left tool bar and the clicking 'Host a Fundraiser.'
- The Third Party will obtain all necessary permits, licenses and insurance for their event.
- All funds and tax receipt information, if approved to issue receipts (i.e., contact information for receipting), must be received by BBBSOS within 30 days after the event.
- The third party agrees to handle all monetary transactions for the special event or promotion, and to present the proceeds to Big Brothers Big Sisters of the Ocean State upon completion of the event or as agreed to by both parties in writing.

*Note: The preferred method of payment is a check or money order payable to Big Brothers Big Sisters of the Ocean State. As noted above when applicable, attached to the payment should be a list of donors and/or donations of goods or services.*

- If the event is cancelled, please notify BBBSOS at least one week prior to the event.
- BBBSOS shall have the right at any time and for any reason to request that the event organizer/third party cease use of the name Big Brothers Big Sisters of the Ocean State in connection with the event and the event organizer/ third party shall use its best efforts to comply with such a request.
- BBBSOS will not assume any legal or financial liability at a community event.
- BBBSOS is not responsible for any damage, accidents to persons or property at a community event.
- BBBSOS will only issue tax receipts for the amount of the actual donation received by our agency. Tax receipts cannot be issued for funds used to cover costs of the event or other administrative expenses incurred by the organizer. BBBSOS is permitted to issue tax receipts to individuals that make a donation without receiving a tangible item or benefit in return. Tax receipts are provided for donations of \$10.00 or more.

### Sponsorships

Organizers agree to inform BBBSOS of any effort to recruit large (\$100+) donors or sponsors, prior to making a request, in order to ensure there is not a duplication of solicitation efforts already underway by BBBSOS.



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### Event Insurance and Liability

The organizer of any fundraising event or activity needs to abide by all applicable legislation and apply for any permits/permission that may be required. This is inclusive of all raffles, bingo, vending tickets, other games of chance or any public appeal. If you require guidance in this area, please call us. Copies of any permits need to be sent to the BBBSOS office prior to the event being held.

Organizers are advised to ensure they have the relevant insurance and indemnity considered necessary in association with any event involving the general community or individual members of the public. The sponsor must hold BBBSOS harmless from any and all claims that may arise with this event. Our insurance policy does not cover events conducted by external fundraisers.

Organizers shall assume full obligation and responsibility for payment of expenses in connection with the event. BBBSOS cannot underwrite any portion of the event, and is not responsible for any expenditure related to the event.

### Finance and Tax Rules

Organizers are responsible for opening and maintaining their own bank account for the event if they determine an account is necessary; bank accounts cannot be opened under the name of Big Brothers Big Sisters of the Ocean State.

BBBSOS can provide a tax deductible thank you letter to any donor who makes a check payable to Big Brothers Big Sisters of the Ocean State. Checks made payable to the event organizer or other source will be sent a general thank you letter that will not include a donation value or amount.

Funds raised should be made payable to Big Brothers Big Sisters of the Ocean State and submitted to the office within 30 days of the event.

Federal tax law prohibits third-party events from using BBBSOS' Sales Tax Exemption number or Federal Employer Identification number when purchasing goods or services from suppliers or vendors.

Unless otherwise agreed upon by both parties, BBBSOS will determine how funds will be allocated internally.

### Marketing Materials

The organizer of any fundraising event or activity needs to abide by all marketing guidelines set forth by Big Brothers Big Sisters of America which are adhered to by Big Brothers Big Sisters of the Ocean State, which can be found online. This form can be found by visit [BBBSOS.org](http://BBBSOS.org), clicking 'Get Involved' on the left tool bar and then clicking 'Host a Fundraiser.'

To Acquire the Local BBBSOS Brand you must contact our Development and Communications Manager, Tina Santos by email: [TSantos@bbbsos.org](mailto:TSantos@bbbsos.org)

### Press/Media

Any press or media that you wish to use for your event must be approved by the marketing coordinator prior to usage. Please leave a minimum of **1 week** prior to your press date for approval.



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