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Fundraising

FUNDRAISING EVENT APPROVAL

An *Event Application*, with accompanying materials (artwork, designs, ad copy, etc.), must be sent to the State Office at least 30 days prior to the start of any fundraising project or event. Contracts or agreements for State Office signatures should accompany the application. See Page 208 or available online at www.soindiana.org for this form. The State Office will review the *Event Application* and work with the Area or County Program to ensure the development of an effective, legal, and profitable fundraising project. Only 30% or less of income generated annually should be spent for costs incurred to raise funds.

REPORTING FUNDRAISING

Area and County Programs raising money must report fundraising expenses and income through the consolidated accounting system. See Page 43 for an example of the *Deposit Form* to be utilized, as well as the *Check Request Form*.

PROHIBITION OF FEES

County Programs shall not require payment of fees by athletes or their families for the athlete's participation in Special Olympics, including charges to register or enroll for the program.

TOBACCO AND ALCOHOL

No Accredited Special Olympics Program shall allow the manufacturer or distributor of a tobacco product, alcoholic beverage, or non-alcoholic beer to connect (publicly or visibly) the name or trademark of the product with Special Olympics in any way.

COMMERCIAL MESSAGES

No advertising, other than normal commercial markings found on retail goods, is permitted on equipment used in Special Olympics Games, or on the uniforms or numbers worn by athletes, coaches, or officials.

DONATION VS. SPONSORSHIP

When a corporation or other organization provides financial support for a Special Olympics fundraiser or competition conducted by an Accredited Program, that corporation or organization may receive "benefits" in consideration for their support further defining them as a sponsor versus donor. A sponsorship is defined by the State Office as, "a mutually beneficial business arrangement between SO Indiana and a third party, wherein the third party provides cash and/or in-kind services in exchange for prescribed benefits outlined in a written sponsorship agreement covering a specified period of time." Benefits are goods or services with a monetary value, and could include, but are not limited to the following: free items or goods; complimentary tickets to a dinner event; complimentary foursome for a golf outing; or other complimentary fee which is waived in consideration for a contribution. A portion of the sponsorship amount provided may be considered a charitable donation (defined below), and therefore tax-deductible. This is the amount of the sponsorship contribution, less the benefit value received by the sponsor.

A donation is a contribution of money, goods or services which is given to a not-for-profit in which no goods or services are provided in consideration of a gift. Recognition and acknowledgement strategies of donations may include some minimal valued benefits, but are not provided in consideration for the donation. For more information, or for questions regarding donations vs. sponsorships, contact the State Office.

GAMES/EVENT SPONSORSHIPS

When a corporation or other organization provides financial support for a Special Olympics fundraiser or competition conducted by an Accredited Program, that corporation or organization may describe itself, and/or may be listed in signage, publicity, and promotional materials, only as a "sponsor" of the Special Olympics event. To protect the ownership and integrity of the Special Olympics name and proprietary symbols, contact the State Office before utilizing organizational or product names in the title or name of the event. Additionally, sponsors may never include their corporate, organizational or product names in the title or name of the event. For example, if XYZ Company is the sponsor of an Accredited Program's Basketball Tournament, the event shall NOT be named or described as the XYZ Company's Special Olympics Basketball Tournament.

RAFFLES, BINGO, OR OTHER GAMING

The State of Indiana has strict guidelines and gaming laws concerning the use of raffles or bingo events as fundraisers, making it illegal to conduct such without a license. SO Indiana's policy is that no raffles, bingo or other gaming activities are to be held other than those organized by the State Office.

DIRECT MAIL FUNDRAISING

An Area or County Program may not conduct a direct mail campaign to acquire contributions. Any Program wishing to conduct a special fundraising project involving a mailing, before making any commitment to the project, shall provide SO Indiana with a written, detailed description of the project at least 30 days prior to the launch date.

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REVENUE SHARING

These guidelines are intended to apply to special events and corporate partnerships. The intent is to encourage all Programs to think strategically about situations where all levels of SO Indiana can do better working together, rather than separately.

100% of the revenue remains with the State or County Program when any event sponsorship is established and managed entirely by that Program.

The key principles in implementing a revenue share model are:

1. SO Indiana does better by working together than by "going it alone".
2. Working together maximizes resources for all of SO Indiana.
3. SO Indiana will always work to ensure all parties "remain whole" (i.e. nobody "loses" by bringing forward an opportunity for the greater good).

Listed below are the basic models for revenue sharing. Revenue share for any event or project outside these basic models can be adjusted based on mutual consent of the County Coordinator and CEO of SO Indiana. Shared revenue distributions will be made once financials for an event are complete.

SPECIAL EVENTS

Polar Plunge	
<i>County Programs</i>	50/50 split on total dollars raised by individual plungers recruited by County Programs and registered in advance of the Plunge date.
<i>County Bonus</i>	Counties that raise their plunge goal (25% of previous year's expenses) receive 60% of total dollars raised by plungers.
<i>Area Programs</i>	Budget to operate Area for the year, including medals, signs, banners.
Run Unified Relay	
<i>County Programs</i>	50/50 split on total dollars raised by individual when registering on behalf of a County Program.
Champions Together <i>(Funds raised by schools whose involvement was initiated by SO Indiana & Champions Together)</i>	
	The County Program receives 10% of the funds donated by the high school toward a Champions Together banner. County Programs are encouraged to support the school's efforts, if requested.
Third Party <i>(Organized by an outside group to benefit SO Indiana (e.g. 5K Run, Bowlathon, Fire Truck Pull))</i>	
	If the County Program supports the fundraising event by participating in demonstration events, donor recognition, or event planning the County Program receives 10% of the amount donated.

Freezin' For A Reason



SPONSORSHIPS

STATE OFFICE FUNDRAISING PROJECTS

Knights of Columbus	
	100% returned to County Programs in the form of a discount on Summer Games entry fees for all Counties who have a Knights of Columbus Council donate (<i>excludes 4 "grandfathered" Counties</i>).
Corporate Sponsorships	
	County Program that originates a state sponsorship of \$10,000 or more receives 50% of total in first year and 10% of any annual sustaining sponsorship dollars.



Accredited Area and County Programs with consolidated accounts are given the opportunity to participate in State Office fundraising projects for a portion of the proceeds generated locally. These projects include the Polar Plunge and the Plane Pull Challenge.

The Polar Plunge is a "PG-12" rated event. Children under the age of 12 are prohibited from plunging. Parents should use discretion in bringing children, who are under 12, to the event.

The Plane Pull Challenge is a "G" rated event - suitable for all ages.

Area and County Programs are not permitted to conduct their own fundraising activities during state competitions or fundraising events. This same restriction applies to outside charities or organizations.



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POLAR PLUNGE INTENT TO PARTICIPATE & PLUNGER ROSTER

For those County programs that participate, the revenue share program will be in effect. See Page 49 for details. To register your Plunge team for the 2019 Plunge season, please complete the following steps.

Complete and submit the *Polar Plunge Intent to Participate Form* (Page 149) by Monday, January 28. The form lets the State Office know County Programs plan to participate. On this form, designate the Plunge Coordinator and estimated number of participants who recruited to be a part of the team.

Complete and submit the *Polar Plunge - Plunger Team Roster Form* (Page 150) at least two days before the plunge. It is part of the agreement that rosters represent only those new participants or those participants who have been on past rosters. Each roster member should be personally recruited, communicated with throughout the plunge season, and sent a thank-you after the event.

Questions? Contact Scott Furnish at sfurnish@soindiana.org.

FUNDRAISING FOR THE BENEFIT OF SPECIAL OLYMPICS ONLY

Fundraising events organized by the State Office, as well as by Area and County Programs, are for the benefit of Special Olympics only. Special Olympics resources (including, but not limited to, its name, logo, equipment, training materials, and supplies) should not be used to enhance other organizations fundraising, without the prior approval of the State Office.

KNIGHTS OF COLUMBUS SUMMER GAMES FUND

All funds donated by the Knights of Columbus to SO Indiana (at any level of the organization) will be transferred to the *Summer Games Fund*. The total amount in this fund as of March 31 each year will create a dollar-for-dollar discount for each Summer Games entrant. **All donations must be sent to the State Office for deposit.** Only County Programs participating in the Knights of Columbus sponsorship will receive a Summer Games discount.

ONLINE FUNDRAISING

A Program may not conduct electronic fundraising except through the SO Indiana website. All online fundraising is part of the Revenue-Sharing program (See Page 49).

CONTRACTUAL AGREEMENTS FOR FUNDRAISING

Area and County Programs, and their leadership, are not authorized to enter into any agreement to raise funds or solicit contributions without State Office approval through the *Event Application* (Page 208).

THIRD PARTY EVENTS:

FUNDRAISING BY OTHER ORGANIZATIONS FOR THE BENEFIT OF SPECIAL OLYMPICS

Organizations wishing to conduct fundraising on behalf of Special Olympics must first obtain the specific authority to use the name Special Olympics from the State Office.

No organization shall use the Special Olympics name or marks in association with any fundraising campaign being conducted by a professional solicitor without approval by SO Indiana President/CEO.

FUNDRAISING BOUNDARIES

The geographic boundaries of each respective Area and County Program must be honored whenever fundraising occurs through any means. At no time may a Program solicit from an out-of-state company.

UNITED WAY AFFILIATION

An Area or County Program may not participate in United Way campaigns and cannot be an affiliate or a member of a local United Way.

ACKNOWLEDGEMENT OF DONORS

While best practices in fundraising suggest that acknowledgement of donations regardless of size is important in developing a fundraising program, Area and County Programs receiving a donation of \$250 or more must, by law, provide a thank-you letter within 2-4 weeks that includes the following: 1) specific amount of contribution; 2) information about what the donation will support; and 3) this statement: "Charitable gifts to Special Olympics Indiana, Inc. are tax-deductible to the extent provided by law. No goods or services were received in consideration of this contribution." This statement can appear anywhere in the body of the letter or even at the bottom of the page, beneath your signature. NOTE: This acknowledgment statement, is not applicable to a sponsorship, as goods or services are received in consideration of the contribution. (See Donation vs. Sponsorship section on Page 48 for more information).

For documentation and recognition purposes, a copy of the letter must be included with the *Deposit Form* (Page 43), which also is required to be submitted to the State Office.

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DOCUMENTATION OF DONATED GOODS OR SERVICES

An *In-Kind Gift Receipt Form* (see Page 212) must be completed and signed by the donor of the goods or services (not by a SO Indiana employee or volunteer). All donated goods and services are to be recorded at the fair market value that is documented and provided by the donor. Fair market value, according to IRS guidelines, should be established on a measurable basis (i.e., standard rent for a facility, advertised cost of equipment, posted price for food and beverage by the vendor, etc.).

WHAT IS CONSIDERED A DONATED GOOD OR SERVICE?

An in-kind donation of goods or services will be accepted only after the appropriate SO Indiana staff approves the donation.

Programs should only accept donated goods or services **that would otherwise require approved cash budget expenditures.**

Items considered "in-kind contributions"

- Cost-free use of a facility
- Contributions of food for athletes
- T-shirts from a sporting goods store
- Physicians giving a free medical exam
- Use of vehicle for transportation of athletes

Items not considered "in-kind contributions"

- Physician volunteering as a timer
- Use of basketballs for a day
- Promotional key chains

These lists are not comprehensive and represent EXAMPLES only.

NOTE: Once it is determined that an in-kind contribution has been made, approval granted, and documentation received, the full value of the goods or services will be recognized as an in-kind contribution.

IN-KIND ITEMS FOR FUNDRAISING EVENTS (e.g. Items for a Silent Auction)

Donated goods or services to be auctioned for fundraising purposes are to follow the in-kind donation process. Often, the fundraising event may have separate in-kind donation forms specific to the event. This is acceptable.

DISCOUNTS

Discounts considered for in-kind donation are those granted as a result of a vendor's specific recognition and support of SO Indiana only.

Example: "SO Indiana receives a 50% discount on any order."

Example: "We'll sell you the item at our wholesale price, not regular retail."

Discounts not considered as an in-kind donation are those that result from volume purchases, or that are offered as a standard pricing package or business practice to any customer or client.

Example: "Our customers receive a 50% discount if 500 or more t-shirts are ordered."

Example: "Storage fee is \$50 a month. If you sign up for a year, one month is free."

Example: "Our packages include 20 rooms - 10% discount, 40 rooms - 20% discount."

DONATED PROFESSIONAL FEES

Professional fees considered as in-kind donations are those normally charged by a professional trained (and licensed, if applicable) in that profession for which he/she is providing services, but are waived by the professional service provider. Examples (this is not a comprehensive list – those services for which there is a DIRECT relationship to the profession of the donor may be considered in-kind contributions): accountant, architect, carpenter, doctor, electrician, lawyer, nurse, plumber, officially licensed referee, teacher, professional coach, and other professionals and craftsmen.

Example: "a doctor coordinating the Healthy Athletes screening area."

Example: "an attorney drafting the rental agreement contract for a venue."

Professional fees not considered for in-kind donation are those where a service is provided, but the service is NOT in direct relation to the profession of the donor.

Example: "a doctor volunteering to escort athletes at track & field."

Example: "a business manager serving lunches at the cafeteria."

LAW ENFORCEMENT TORCH RUN (LETR)

Law enforcement officers from across Indiana participate in the LETR program. Area and County Programs are encouraged to recommend officers who may be interested in raising awareness and funds to the State Office for more information and membership. Officers will be provided with the necessary forms, local Special Olympics contacts, and support through this process. LETR fundraisers are not part of the County Revenue Share program, unless otherwise indicated by the State Office.



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PROTECTED CORPORATE AND ORGANIZATIONAL CONTACTS

The following is a list of businesses or organizations that are current and/or prospective SO Indiana supporters through the State Office. Area and County leadership must contact the State Office before approaching these entities for a donation so the company only receives one "knock on the door." This list will be updated as needed and any revised version will be emailed to Area and County leadership. You are encouraged to check with the State Office before approaching support from organizations with which you do not have a previous relationship. If you have any questions, please contact Kelly Ries at kries@soindiana.org.

AAR Aircraft Services	Graycor Services LLC	McDonald's
ABRA Auto Body & Glass	Great Lakes Communications Sales, Inc.	MHS - Managed Health Services
Ackerman Foundation	Haag Ford Sales	Mobi Wireless Management, LLC
Allegion	Haubstadt Sommerfest, Inc.	Moose Charities, Inc.
Alpha Chi Sigma	Hirons	Mosaic, Inc. Terre Haute
Alpha Gamma Delta	Horton Holding Inc.	The Napoleon State Bank
Alpha Sigma Alpha	IM-KMSHA	Newburgh Civitan Club
American Family Mutual Insurance Company	IAC Sports Foundation, Inc.	Nicholas H. Noyes Jr. Memorial Foundation
Anthem Blue Cross & Blue Shield	Indiana AMVETS Department Service	North Dearborn Conservation Club
Anthem Foundation Inc.	Foundation, Inc.	Ohio Mills, Inc.
Ayres Foundation, Inc.	Indiana Association of Chiefs of Police	Omnisource
Ball Brothers Foundation	Indiana Chemical Trust	Onix Networking Group
Bank of America	Indiana Criminal Justice Association Inc.	Orchard Software
Batesville Chrysler Dodge Jeep	Indiana Department of Correction	Otis R. Bowen Center for Human Services, Inc.
Becknall Industrial	Indiana F.O.P. Foundation, Inc.	Pacers Sports & Entertainment
Bingham Greenebaum Doll LLP	Indiana Golf Foundation, Inc.	Parkview Health
Browning Investments, Inc.	Indiana High School Athletic Association	PEN Products
Business Professionals of America	(IHSAA)	Pepsi Bottling Company
Butler, Fairman, & Seufert, Inc.	Indiana Interscholastic Athletic	Phi Sigma Kappa
Casey's General Store	Administrators Association	Psi Iota Xi, Eta Gamma Chapter
CHA Consulting, Inc.	Indiana Law Enforcement Training Academy	Randle Fine Family Foundation
Central Indiana Police Foundation	Indiana Moose Association	Red Robin
Central Supply Co.	Indiana Pacers	Rolls-Royce
Christel Dehann Family Foundation, Inc.	Indiana Section PGA of America	Ron Klei & Sons Inc.
City of Lawrenceburg	Indiana Sheriff's Association	Rose-Hulman Institute of Technology
City Securities Corporation	Indiana State Fraternal Order of Police(FOP)	Sallie Mae
Coca-Cola	Indiana State Police	Shrewsbury & Associates LLC
Community Health Charities	Indiana State Police Alliance	SIA Foundation, Inc.
CSAA Insurance Services, Inc.	Indiana State University	Sigma Tau Gamma
CWC Commercial Warehouse & Cartage, Inc.	Indianapolis Airport Authority	Sign*A*Rama, Inc.
Data Bank	Indianapolis Airport Police	Solid Platform
DEEM, LLC	Indianapolis Colts	Southeastern Indiana REMC
Delta Dental	Indianapolis Colts Foundation, Inc.	Southwest Airlines
Delta Sigma Pi	Indianapolis Indians	State Farm
DePuy Products, Inc.	Indy Eleven	Steel Dynamics
Digital Management, LLC.	Inverse Square	Subaru of Indiana Automotive, Inc.
Dot Foods	IPMG	Sun King Brewing Company LLC
Duke Energy	IU Health	Sweetwater Sound, Inc.
The Duke Energy Foundation	Jarred Bunch Consulting, LLC	Taft Stettinius & Hollister LLP
Dunkin Donuts	John W. Anderson Foundation	Teachers Credit Union
Enterprise Fleet Management Inc.	Junior League of Indianapolis, Inc.	Terre Haute Convention & Visitors Bureau
Enterprise Holdings Foundation	Kappa Sigma	Texas Roadhouse
Enterprise Leasing Company	Kimball Electronics Group LLC	Toyota Motor Manufacturing of Indiana
Erie Insurance	Knights of Columbus, Indiana State Council	UCB Charitable Foundation
FedEx	Koorsen Fire & Security	United Healthcare
Fifth Third Bank	Kroger	University of Indianapolis
Fine Promotions, Inc.	Lamda Chi Alpha	University of Indianapolis, Greyhound Club
Finish Line Youth Foundation	Law Enforcement Torch Run	Wal-Mart Foundation
The Finish Line, Inc.	Law Office of Elizabeth A. Homes, LLC	Walker Information
FirstGiving	LEL Home Services, LLC	Warrick Co. FOP Lodge 148Whiskey River
Fleschner, Stark, Tanoos, & Newlin	Lids Foundation, Inc.	BBQ Inc.
FOE Aerie 1130	Lilly Endowment, Inc.	Whitewater Valley REMC Community Trust
FOP Associates	Lion's Club	Wilhelm-Waggoner & Bundy, LLC
Fraternal Order of Eagles (FOE)	Lucas Oil Products, Inc.	
Frederick Benson Trust/First Financial Bank	Lumina Foundation	
Froderman Foundation Inc.	Lutgring Brothers, Inc.	
GE Aviation	Mathis Moto Mart & Amsoil Synthetics	
Gibault, Inc.	Matthews International DBA Interim Care,	
Gordon F. Homes	Lawrenceburg	