



# 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. 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 the 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.

# Fundraising



## 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

<b>Polar Plunge</b> <i>(Saturday Events Only)</i>	
<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 or \$1,000 whichever is greater) receive 60% of total dollars raised by plungers.
<i>Area Programs</i>	Budget to operate Area for the year, including medals, signs, banners.
<b>Run Unified Relay</b>	
<i>County Programs</i>	50/50 split on total dollars raised by individual when registering on behalf of a County Program.
<b>Champions Together</b> <i>(Funds raised by schools whose involvement was initiated by SO Indiana &amp; 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.
<b>Third Party</b> <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 may be eligible to receive 10% of the amount donated.

Freezin' For A Reason



## SPONSORSHIPS

### STATE OFFICE FUNDRAISING PROJECTS

<b>Knights of Columbus</b>	
	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 (excludes 4 “grandfathered” Counties).
<b>Corporate Sponsorships</b>	
	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 Run Unified Relay.

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.



# Fundraising

## **POLAR PLUNGE INTENT TO PARTICIPATE & PLUNGER ROSTER**

For those County programs that participate, the revenue share program will be in effect. To register your Plunge team for the 2020 Plunge season, please complete the following steps.

Complete and submit the *Polar Plunge Intent to Participate Form* by Monday, January 13. 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* 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](mailto: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.

## **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*.

## **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 for more information).

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

# Fundraising



## DOCUMENTATION OF DONATED GOODS OR SERVICES

An *In-Kind Gift Receipt Form* 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.



# Fundraising

## 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](mailto:kries@soindiana.org).

AAR Aircraft Services  
ABRA Auto Body & Glass  
Ackerman Foundation  
Allegion  
Alpha Chi Sigma  
Alpha Gamma Delta  
Alpha Sigma Alpha  
American Family Mutual Insurance Company  
Anthem Blue Cross & Blue Shield  
Anthem Foundation Inc.  
Ayles Foundation, Inc.  
Ball Brothers Foundation  
BAM Outdoors  
Bank of America  
Batesville Chrysler Dodge Jeep  
Becknell Industrial  
Bingham Greenebaum Doll LLP  
Bridges of Indiana  
Browning Investments, Inc.  
Business Professionals of America  
Butler, Fairman, & Seufert, Inc.  
Casey's General Store  
CHA Consulting, Inc.  
Central Indiana Police Foundation  
Central Supply Co.  
Christel Dehann Family Foundation, Inc.  
City of Lawrenceburg  
City Securities Corporation  
Coca-Cola  
Cohoat and O'Neal Management  
Community Health Charities  
CSAA Insurance Services, Inc.  
CWC Commercial Warehouse & Cartage, Inc.  
Data Bank  
DEEM, LLC  
Delta Dental  
Delta Sigma Pi  
DePuy Products, Inc.  
Digital Management, LLC.  
Dot Foods  
Duke Energy  
The Duke Energy Foundation  
Dunkin Donuts  
Eli Lilly and Company  
Engel & Voelkers  
Enterprise Fleet Management Inc.  
Enterprise Holdings Foundation  
Enterprise Leasing Company  
Erie Insurance  
FALK PLI  
FedEx  
Fifth Third Bank  
Fine Promotions, Inc.  
Finish Line Youth Foundation  
The Finish Line, Inc.  
FirstGiving  
Fleschner, Stark, Tanoos, & Newlin  
FOE Aerie 1130  
FOP Associates  
Francisco Partners  
Fraternal Order of Eagles (FOE)  
Frederick Benson Trust/First Financial Bank  
Froderman Foundation Inc.  
GE Aviation  
Gibault, Inc.  
Gordon F. Homes

Graycor Services LLC  
Great Lakes Communications Sales, Inc.  
Haag Ford Sales  
Haubstadt Sommerfest, Inc.  
Hays & Sons  
Hickory Hall Polo Club  
Horton Holding Inc.  
IM-KMSHA  
IAC Sports Foundation, Inc.  
Indiana AMVETS Department Service Foundation, Inc.  
Indiana Association of Chiefs of Police  
Indiana Chemical Trust  
Indiana Criminal Justice Association Inc.  
Indiana Department of Correction  
Indiana F.O.P. Foundation, Inc.  
Indiana Golf Foundation, Inc.  
Indiana High School Athletic Association (IHSAA)  
Indiana Interscholastic Athletic Administrators Association  
Indiana Law Enforcement Training Academy  
Indiana Moose Association  
Indiana Pacers  
Indiana Section PGA of America  
Indiana Sheriff's Association  
Indiana State Fraternal Order of Police (FOP)  
Indiana State Police  
Indiana State Police Alliance  
Indiana State University  
Indianapolis Airport Authority  
Indianapolis Airport Police  
Indianapolis Colts  
Indianapolis Colts Foundation, Inc.  
Indianapolis Indians  
Indy Eleven  
Indy Fuel  
Inverse Square  
IPMG  
IU Health  
Jarred Bunch Consulting, LLC  
John W. Anderson Foundation  
Jones Lang LaSalle Inc.  
Junior League of Indianapolis, Inc.  
Kerauno  
Kimball Electronics Group LLC  
Knights of Columbus, Indiana State Council  
Koorsen Fire & Security  
Kroger  
Lamda Chi Alpha  
Law Enforcement Torch Run  
Law Office of Elizabeth A. Homes, LLC  
LEADers INDY  
LEL Home Services, LLC  
Lids Foundation, Inc.  
Lilly Endowment, Inc.  
Lion's Club  
Lucas Oil Products, Inc.  
Lumina Foundation  
Lutgring Brothers, Inc.  
Mathis Moto Mart & Amsoil Synthetics  
Mathews International DBA Interim Care, Lawrenceburg  
McDonald's  
MediaFuel  
MHS - Managed Health Services

Midwest Premier Painting  
Moose Charities, Inc.  
Mosaic, Inc. Terre Haute  
The Napoleon State Bank  
Newburgh Civitan Club  
Nicholas H. Noyes Jr. Memorial Foundation  
North Dearborn Conservation Club  
Ohio Mills, Inc.  
OmniSource  
Onix Networking Group  
Orchard Software  
Otis R. Bowen Center for Human Services, Inc.  
Pacers Sports & Entertainment  
Parkview Health  
PEN Products  
Pepsi Bottling Company  
Phi Sigma Kappa  
Psi Iota Xi, Eta Gamma Chapter  
Randle Fine Family Foundation  
Rolls-Royce  
Ron Klei & Sons Inc.  
Rose-Hulman Institute of Technology  
Ryan Fire Protection  
Sallie Mae  
SIA Foundation, Inc.  
Sigma Tau Gamma  
Sign\*A\*Rama, Inc.  
Solid Platform  
Southeastern Indiana REMC  
Southwest Airlines  
State Farm  
Steel Dynamics  
Subaru of Indiana Automotive, Inc.  
Sun King Brewing Company LLC  
Sweetwater Sound, Inc.  
Taft Stettinius & Hollister LLP  
Tangoe  
Teachers Credit Union  
Terre Haute Convention & Visitors Bureau  
Texas Roadhouse  
Thompson Thrift  
Thyssen Krupp  
Toyota Motor Manufacturing of Indiana  
UCB Charitable Foundation  
United Healthcare  
University of Indianapolis  
University of Indianapolis, Greyhound Club  
Wal-Mart Foundation  
Walker Information  
Warrick Co. FOP Lodge 148  
Whiskey River BBQ Inc.  
Whitewater Valley REMC Community Trust  
Wilhelm-Waggoner & Bundy, LLC