

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 percent 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. PARTNERSHIP

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 partner versus donor. A partnership is defined by the State Office as, "a mutually beneficial business arrangement between SOIN and a third party, wherein the third party provides cash and/or in-kind services in exchange for prescribed benefits outlined in a written partnership 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; other complimentary fee which is waived in consideration for a contribution. A portion of the partnership amount provided may be considered a charitable donation (defined below), and therefore tax-deductible. This is the amount of the partnership 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. partnerships, contact the State Office.

GAMES/EVENT PARTNERSHIPS

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 "partner" 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 partner 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. SOIN's policy is that no raffles, bingo, or other gaming activities are to be held other than those organized by the State Office.

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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 SOIN with a written, detailed description of the project at least 30 days prior to the launch date.

REVENUE SHARING

These guidelines apply to special events and corporate partnerships. The intent is to encourage all programs to think strategically about situations where all levels of SOIN can do better working together, rather than separately. 100 percent 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. SOIN does better by working together than by “going it alone.”
2. Working together maximizes resources for all of SOIN.
3. SOIN 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 SOIN. Shared revenue distributions will be made once financials for an event are complete.

SPECIAL EVENTS

Polar Plunge <i>Saturday/Sunday plunges 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.
Third Party <i>(Organized by an outside group to benefit SOIN (e.g. 5K Run, Bowlathon, Fire Truck Pull, etc.</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.



PARTNERSHIPS

STATE OFFICE FUNDRAISING PROJECTS

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.

Knights of Columbus	
	100% returned to County Programs in the form of a discount on Summer Games entry fees for all Counties that have a Knights of Columbus Council donate <i>(excludes 4 "grandfathered" Counties).</i>
Corporate Partnerships	
	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.



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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COUNTY REVENUE SHARE PROGRAM

The County Revenue Share Program is to benefit the State, Area, and County Programs. It is the hope of SOIN that County Programs embrace working together in the spirit - "The bigger the pie, the bigger everyone's piece." Each County has an established goal determined by 25% of the previous year's operating expenses. In order to participate in the County Revenue share teams must be create by the county prior to the event and must follow naming guidelines.

The Breakdown of County Revenue Share Program is as follows:

- A. County Fundraising Team online and offline revenue
 - a. Created prior to event
 - b. Active county participation
 - i. Team members
 - 1. Team members can inculde Coachers, Atheltes/Uniftied Partner and their families
 - ii. Funds raised
- B. Sponsors
 - a. The county must have played an active role in introducing and connecting the partner to the event.
 - b. Partners must be introduced to state office and have a signed commitment prior to event.
- C. Participant selection
 - a. During registration, participants will be prompted to select which county they wish to support from a drop-down menu.
 - i. We will only count participants who make this selection at the time of registration

Polar Plunge Revenue Share:

- A. Registrar your County Fundraising page on the online fundraising platform.
 - a. Name must include the following
 - i. SOIN
 - ii. County Name
 - iii. NicknameExample: SOIN Wabash County Frozen Popsicles
- B. Upon completion of the Polar Plunge, County teams that participate will receive 50% of their Plunge revenue. This will be an electronic transfer.
 - a. If County Fundraising Goal has been achieved than the County will receive 60% of their Plunge revenue.

Plane Pull Challenge Revenue Share:

- C. Registrar your County Fundraising page on the online fundraising platform.
 - a. Name must include the following
 - i. SOIN
 - ii. County Name
 - iii. NicknameExample: SOIN Wayne County Muscile
- D. Upon completion of the Plane Pull Challenge, County teams that participate will receive 50% of their team revenue. This will be an electronic transfer.

This is part of our agreement that your team page represents only those participants that are apart of your county program, Coaches, Athletes/Unified partners and their families. The promoted participant selection of counties will allow for members who will like to support your program but are not related to it or wish to participant on their own.

Team members should be personally recruited, communicated with throughout the event season and sent a thank you after the event.

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.

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KNIGHTS OF COLUMBUS SUMMER GAMES FUND

All funds donated by the Knights of Columbus to SOIN (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 discount for participating counties that attend the Summer Games. All donations must be sent to the State Office for deposit. Only County Programs collecting donations from the Knights of Columbus will receive a Summer Games discount.

ONLINE FUNDRAISING

A program may not conduct electronic fundraising except through the SOIN website. All online fundraising is part of the revenue-sharing program.

ONLINE DONATIONS

SOIN has a collaborative agreement with Special Olympics Inc. for digital, direct mail and online campaigns. If you have a local donor who gives a gift to SOIN through the website, it is not possible to request 100% of the gift be given to the local program unless the donation is from a SOIN Board Member or intended as a Peer-to-Peer fundraising gift for Polar Plunge or Plane Pull.

Exceptions are extremely rare. An existing relationship with a donor is not justification for an exception, unless you have actively cultivated the donor for a gift directly to your Program and the gift in question represents an upgrade over-and-above what the donor has historically given through IDMP/CDMP. Additionally, tribute gifts (or In Honor of/In Memorial of giving) do not qualify as an exception. Gifts given as a tribute to "Special Olympics" or "Special Olympics PROGRAM/AREA" are considered a shared general donation under the current contract with Special Olympics International.

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.

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).

THIRD PARTY EVENTS:

FUNDRAISING BY OTHER ORGANIZATIONS FOR THE BENEFIT OF SPECIAL OLYMPICS

Organizations and companies wishing to conduct fundraising on behalf of Special Olympics must first obtain the specific authority from the State Office to use the name Special Olympics or SOIN. No organization shall use the Special Olympics name or marks in association with any fundraising campaign being conducted by a professional solicitor without prior approval by SOIN President & CEO.

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LAW ENFORCEMENT TORCH RUN (LETR)

Law enforcement officers from across Indiana participate in the LETR program. Area and County Programs are encouraged to recommend to the State Office any officers who may be interested in raising awareness and funds. 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-sharing program, unless otherwise indicated by the State Office.

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 SOIN 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 SOIN 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 SOIN only.

- Example: "SOIN 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 they is providing services but are waived by the professional service provider. This is not a comprehensive list examples (of 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."

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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.”

GRANTS

We encourage counties to solicit grants from foundations and organizations in your county, except for any organization included on the “protected corporate and organizations contacts” list. Requests can only be for items that fall within the mission of the organization and cannot be for any prohibited purchase. Once the grant is awarded, submit all grant documentation to the state office, including the grant application and grant award letter, along with your deposit detail, as part of the deposit process and clearly state on the form that this is a grant. All grants received for any specific purpose MUST be spent for that purpose. If you have unspent grant funds, prior to returning any funds to the grantor please contact the funder to request that such funds be used for an alternative purpose. If a grant report is required, please submit that to the state office at the countyacctng@soindiana.org email address.

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PROTECTED CORPORATE AND ORGANIZATIONAL CONTACTS

The following is a list of businesses that are current and/or prospective SOIN 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 request for support. 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.

- AAA Hoosier Motor Club
- Abel Construction
- Accelerate Indiana Municipalities
- Ackerman Foundation
- Allegion
- Alpha Gamma Delta
- Alpha Sigma Alpha Sorority
- Alpha Sigma Alpha Foundation
- Alpha Sigma Alpha National Headquarters
- Amazon
- Amazon Transportation
- American Cornhole Association
- American Family Insurance
- AMVETS
- AMVETS Ladies Auxiliary
- Anthem Blue Cross & Blue Shield
- Anthem Blue Cross and Blue Shield Foundation Inc
- Anthem Dollars for Doers
- Ball Brothers Foundation
- BAM Outdoor Inc.
- Bank of America
- Bank of America Charitable Gift Fund
- Becknell Industrial
- Bingham Greenebaum Doll, LLP
- Bone Dry Roofing
- Butler, Fairman & Seufert, Inc.
- C&M Smith Restaurants, Inc.
- Central Indiana Community Foundation
- Central Supply Company, Inc.
- CHA Consulting, Inc.
- Citizens Energy Group
- Coca-Cola Consolidated Inc., Mid-West Market Unit
- Coca-Cola Consolidated Inc.
- Cosgrove Family Foundation
- CWC Commercial Warehouse & Cartage, Inc.
- Delta Dental Foundation
- Down For A Cure, Inc.
- Duke Energy
- Dunkin' Donuts Corporate
- Enterprise Fleet Management Inc.
- Enterprise Holdings
- Enterprise Holdings Foundation
- Erie Insurance Group
- Everwise Credit Union
- FCN Bank—Sunman
- FedEx Express
- Ferraro Behavior Services LLC
- Fifth Third Bank
- Fine Promotions Inc.
- Finish Line Youth Foundation
- Fishers Freight
- Fishers Police Foundation
- Frederick Benson Trust/First Financial Bank
- Froderman Foundation Inc.
- Future Keys Foundation
- GE Aerospace Foundation
- GE Aviation
- Haag Ford Sales Inc
- Halderman Farm Management
- Horton Holdings Inc.
- IHSAA
- IHSAA Foundation
- Indiana ABLE Authority
- Indiana AMVETS Dept. Service Foundation Inc.
- Indiana Chemical Trust
- Indiana Conference of Mayors
- Indiana Criminal Justice Association Inc.
- Indiana Department of Correction
- Indiana F.O.P Foundation, Inc.
- Indiana Golf Foundation, Inc.
- Indiana Harbor Belt Railroad Company
- Indiana Interscholastic Athletic Admin. Assoc.
- Indiana Law Enforcement Training Academy
- Indiana Section PGA of America
- Indiana Sheriffs' Association
- Indiana State FOP Auxiliary
- Indiana State Police
- Indiana State Police Alliance
- Indiana State University
- Indiana State University Foundation
- Indiana University Health
- Indiana Women's Prison

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PROTECTED CORPORATE AND ORGANIZATIONAL CONTACTS

- John W. Anderson Foundation
- Kappa Sigma Fraternity
- Kentuckiana Trucking, Inc.
- Kirby Realty Group LLC
- Knauss Property Services LLC
- KONE Americas-Indianapolis
- Koorsen Fire & Security
- KMPG LLP
- Lassus
- Law Office of Elizabeth A. Homes, LLC
- LEL Home Services, LLC
- Lilly Endowment, Inc.
- Lions Club of Indiana
- Lucas Oil Products, Inc
- Lumina Foundation
- Lutgring Brothers, Inc.
- Macallister Machinery Company
- Makers Foundation, Inc.
- Masters Spa
- McDonald's of Terre Haute
- McGowan Insurance
- Meijer
- Miami Correctional Facility
- Midas Service Center
- Midwest Design Group, LLC
- Mister Quick Home Services
- Mosaic, Inc. Terre Haute
- Newburgh Civitan Club
- Nicholas H. Noyes Jr. Memorial Foundation
- North Dearborn Conservation Club
- Ohio Mills, Inc.
- OmniSource
- Osgood Lions Club
- Pacers Foundation, Inc.
- Pacers Sports & Entertainment
- Parkview Health
- Pendleton Correctional Facility
- Pendleton Juvenile Correctional Facility
- Phi Sigma Kappa
- Pi Kappa Alpha
- Plainfield Correctional Facility
- Polar Leasing Co
- Precision Control Systems, Inc.
- Randle Family Foundation
- Renaissance Charitable Foundation Inc.
- Rolls-Royce
- Rose-Hulman Institute of Technology
- Ryan Fire Protection Inc.
- Schuetter Family Foundation
- Select Commercial Services
- Sigma Tau Gamma
- Sign-A-Rama
- Solid Platforms, Inc.
- Southeastern Indiana REMC
- SpartanNash Foundation
- State Farm Insurance
- Steel Dynamics, Inc.
- Stuart Road Racing, LLC
- Subaru of Indiana Automotive, Inc.
- Sweetwater Sound, LLC
- Taft Stettinius Hollister LLP
- Terre Haute Casino Resort
- Terre Haute Convention & Visitors Bureau
- Texas Roadhouse Holdings
- The Bradford Todd Fleck Foundation
- The Harding Family Foundation
- The Kay LaMont Charitable Foundation
- The Kroger Co. Foundation
- The Napoleon State Bank
- The Steel Technologies Foundation
- Thomas M. and Shirley A. Hill Family Foundation
- TLC Management
- Toyota Motor Manufacturing Indiana, Inc.
- United Healthcare
- University of Indianapolis
- Valient Foundation, Inc.
- Wabash Valley Children's Dentistry
- Wabash Valley Correctional Facility
- Walmart Foundation
- Wawa
- Whiskey River BBQ, Inc.
- Winamac Coil Spring, Inc.
- Winkler, Inc.
- Winstar
- Wolfies at Geist