

FUND RAISING

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FUND RAISING FOR YOUR AGENCY

Begin at the Beginning

- Determine how much money your Agency will need by developing a budget. (Ask: what do we need and how much will it cost?)
- Find volunteers who are willing to help by heading up different projects.

How to Raise Money

There are many ways to raise funds to meet the financial needs of your Agency:

- **SPECIAL EVENTS:** Bowl-a-thon, dinners, auctions, dances, share nights at local fast food restaurants, etc.*
- **SALES:** Popcorn or candy sales, car washes, ad books, etc.*
- **IN-KIND CONTRIBUTIONS:** Donation of equipment, facilities, services from service organizations, schools, churches, recreation departments in your community, etc.
- Ask other Agencies what successful fundraisers they have had.

*Please note that these items may be subject to sales tax.

Some Important Information

Before you ask for any contributions or plan an event, be sure to read the Special Olympics Wisconsin Fund Raising Guidelines included in this section of the handbook. These policies will give you some important information about what guidelines must be followed to meet state laws and Special Olympics policies. Any project or event must be approved in advance by Special Olympics Wisconsin. A Fund Raising Project Application Form must be completed and sent to your Regional office 30-60 days before the project/event is held.

Your Fundraiser Will Be Successful if you Plan!

Any successful fund raising project or event depends on three important factors:

- 1) The type of project or event you select
- 2) The people you choose to organize it
- 3) The timing for the project or event

Inform your Regional Director of Development in your Regional office about your event as soon as possible by utilizing the Fund Raising Application contained in this section of the Agency Manager Handbook. Do not be afraid to ask them for advice and help. Good organization and management prior to, and on the day, of the event or during the duration of a project will demonstrate that your Agency is organized and run by committed volunteers.

Telling the Community About Your Agency . . . And Fund Raising Project

By inviting a radio personality to run in its annual fund raising mini-marathon, one group found itself receiving weeks of advance promotion featuring the personality. On the day of the race, the announcer made live reports of his progress during the regular news breaks. After the fact, the race was a subject for joking and analysis by other station announcers – and incidentally more publicity for the cause.

If you live in a smaller community invite someone from the radio or TV news department to attend a planning session for your event. He or she may volunteer to participate, or suggest ways to structure your fundraiser to make it easier and more attractive to cover as a news story. Besides publicity, some local stations may be interested in helping sponsor the event, or helping to enlist other community organizations. All you need to do is ask!

When you plan a fund raising project or event, request PSA's (Public Service Announcements), and submit press releases. A sample format for a press release and public service announcement is included in the Communication and Public Relations section of this handbook. Before sending out a press release, e-mail a copy to your Regional office and ask the Regional Director of Development to review the release to make sure its message is consistent with how we are representing SOWI statewide to the media.

Recognize Volunteers and Contributors

Be sure to thank everyone who helped make the event or project a huge success. Recognition of a job well done through a letter or certificate is always appreciated and is the key to bringing back good volunteers year after year. A letter to the editor is often a good, no cost way to thank the community and the people who have been particularly supportive.

FUND RAISING POLICIES

Fund Raising Project Application Form

Any project or event must be approved in advance by SOWI. A *Fund Raising Project Application Form* (see Forms for Duplication) must be completed and sent to your Regional office 30-60 days before the project/event is held. Submitting this form ensures your Regional Director of Development is aware of your event so they may assist you, and if people call them for information, they can validate the event and provide accurate information. Whenever possible, the Regional office will help promote your event through their newsletter or monthly mailings.

Advertising and Recognition of Sponsors/Supporters

Volunteers and officials may wear jackets, t-shirts, caps and other apparel bearing small and attractively designed identifications of corporate logos at sports venues. Athletes may carry and use non-apparel, non-sports equipment items such as tote bags, bearing small and attractively designed identifications of corporate or organizational sponsors.

Athletes who are **not** in competition and who are **not** at sports venues (e.g., at training sessions, practices, trips, or away from competition sites) may wear apparel bearing small and attractively designed identifications of corporate or organizational logos.

Opening and Closing Ceremonies sites are deemed to have the same status as sports venues. Hence, team or delegation members and officials **shall not** wear warm-up suits, jackets, caps, etc. which bear corporate or organizational identifications which might be considered advertising.

Alcoholic Beverages

A Special Olympics Agency shall not allow the manufacturer or distributor of alcoholic beverages to publicly or visibly connect the trademark of an alcoholic beverage with Special Olympics events or activities. Non-alcoholic beer products are treated in the same manner as alcohol and beer products.

Alcohol distributors may sponsor Agency fund raising projects if the name of the company does not have a beer or an alcohol brand listed in it such as "Andrews Distributing".

Agencies shall not sell alcoholic beverages at a concession stand, sponsored fund raising event or any other activity where it is perceived the dollars raised will benefit Special Olympics or the Agency. Agencies may only accept funds donated through the sale of alcoholic concessions if the contribution is a blind donation by a third party and there was no advertising of alcohol sales utilizing the name of the Agency or Special Olympics.

An Agency may accept blind and unidentified contributions (cash or in-kind) from alcohol/tobacco manufacturers or distributors. These manufacturers or distributors may publicly link the trademarks of their products other than tobacco or alcoholic beverages with Special Olympics.

Tobacco Products

A Special Olympics Agency shall not allow the manufacturer or distributor of a tobacco product to publicly or visibly connect the trademark of a tobacco product with Special Olympics in any way.

Contractual Agreements

Contracts for facility rental may be signed by the Agency manager. See the Insurance section for further information.

Telemarketing (Telephone Solicitation)

Special Olympics Wisconsin has contracted with a telemarketing firm to provide these services exclusively in the state. An Agency may not enter into a contract for telemarketing services or conduct a campaign themselves.

- SOWI contracts with Heritage/Medallion Productions, an Arkansas-based, third-party fundraising firm that supports 48 of the U.S. Special Olympics Programs.
- This firm calls businesses to raise funds, offer opportunities to donors and potential donors for volunteering, coaching, family involvement, information on planned giving, community events, calendar of events for the 137 sports events held statewide, in addition to educating donors and potential donors about SOWI and the many new programs that are available for athletes (Healthy Athletes, Young Athletes, ALPs, Unified Sports[®] and the many benefits the athletes derive from being involved with SOWI).
- The campaign typically raises over \$330,000 pledged dollars for Wisconsin between January 1 and December 31.
- An average of 54% of dollars raised from the business campaign is net profit for SOWI. All expenses for this program are taken out of Medallion's percentage.

Direct Mail and Telemarketing

SOWI participates in an integrated direct mail and residential telemarketing program in cooperation with Special Olympics Inc. (SOI). This is a valuable source of revenue for us that we could not manage internally, but for which we also must abide by specific rules or risk losing this program. One of those rules involves how we may contact businesses to support our programs. SOI understands that local programs need to contact businesses to support local activities, so small-scale, targeted mailings (e.g., a letter inviting businesses to sponsor a local event or underwrite the cost of a team's uniforms) are acceptable. However, sending a blanket letter asking for general operating funds would be a violation. Also, the contract makes a point of stating that the letters be sent to business addresses only, not residential addresses (their example is a doctor's office located out of one's home - not ok). Letters sent to individuals asking for contributions is prohibited. This policy applies to all levels of SOWI (Headquarters, Regions and Agencies).

- SOI composes and mails all of the direct mail pieces for SOWI.
- SOI creates and deploys fundraising emails throughout the year in conjunction with other direct marketing efforts.
- SOI mails approximately 10 renewal campaigns annually, so it is possible for a donor to receive multiple mail pieces over a 12 month period.
- SOI approves all scripts and schedules for telemarketing.
- The names for our program come from our existing donor list as well as rented donor names from other mailers.
- SOWI receives net revenue for this program.
- There are no restrictions on friend-asking-friend event pages (like Polar Plunge event pages) or online auction or merchandise sales.

These contributions support your local Agency as well as Special Olympics' worldwide programs and initiatives. By participating in a cooperative direct mail effort with Special Olympics, Inc. and other state programs, we make these dollars go further for athletes here and around the world.

In-Kind Donations

An in-kind donation is the receipt of goods, materials or services that would have normally been purchased. The value assigned to in-kind donations should be the fair market value, i.e., what would have been paid to make the purchase. It is the responsibility of the donor to determine the value. Please contact your Region office or the Headquarters office for these forms to be completed and signed by the donor.

Region/Agency Geographical Boundaries

The geographic boundaries of each respective Region/Agency must be honored whenever fund raising occurs through any means. Permission must be obtained through the Regional office prior to locating any event or making any solicitation outside of the Agency's geographical boundary.

Gift Acknowledgements

All gift acknowledgements will be processed by the Headquarters office in accordance with Internal Revenue Service (IRS) rules.

Raffle Licenses

Raffles are a great way for Agencies to fundraise, especially if prizes can be donated. A raffle is a game of **chance** in which tickets are **sold** and a drawing for **prizes** is held. If you are holding a drawing that includes all three of these components, it is considered a raffle.

For every raffle conducted by an Agency, before printing tickets you must approve the raffle with the Headquarters office at 800-552-1324.

The Headquarters office will provide the Agency with a custom-made ticket for the event, the official license number, and guidelines to conduct the raffle to comply with the Wisconsin Department of Administration – Division of Gaming raffle rules.

There are two classes of raffle licenses. The determination as to which license is appropriate is based on "pre-event" raffle ticket sales or "day of event" ticket sales. A post event accounting of the dollars raised and products/services raffled is required by the state of Wisconsin and **must be completed within one month** of the raffle. Failure to do so could result in suspension of SOWI's raffle licenses by the Division of Gaming.

All sections of the raffle reporting form must be filled out completely before returning it to the Headquarters Office. We use these forms to turn in our paperwork to the IRS and obtain the new licenses each year. Some key points in holding your raffle and completing the paperwork are:

- Contact the Headquarters office to obtain the license **BEFORE** planning your raffle and printing tickets.
- When requesting a raffle license, provide your name and contact info, the date of your raffle, what the raffle is for, and if you are selling tickets in advance.
- Raffle tickets cannot be used as an admission ticket to an event.
- All raffle drawings shall be held in public. The drawing cannot be held at an event that requires admission payment to enter (ex. a basketball game, a \$5 spaghetti dinner). You must hold the drawing outside of the event instead so that any ticket holders can be present.
- **Raffle tickets, stubs or money for the raffle cannot be sent via U.S. Mail.**
- For prizes valued over \$600, the winner's **social security number must be obtained PRIOR** to issuing the prize. This information must also be reported on the form.
- A complete name and address must be supplied for each winner of prizes worth \$100 or more.
- You will also need to submit any in-kind forms and invoices for your raffle with the reporting form.
- No other revenue or expenses (donations, sponsorships, event fees, auction bid proceeds) from your event that are not directly raffle-related should be listed on your raffle report.

If you have questions about your raffle or need to obtain the license, contact the Headquarters office at 800-552-1324.

SOWI's raffle license was audited in 2008, and breaking any of the regulations provided by the Division of Gaming can result in the loss of our license for all levels of SOWI, including all Agencies. Several Wisconsin groups have had their raffle procedures audited and/or had their licenses revoked in 2008, including Big Brothers Big Sisters of Dane County and the Sportsman's Club in Green Bay.

United Way Affiliation

Special Olympics Incorporated and Special Olympics Wisconsin are not United Way agencies and do not participate in United Way campaigns. Therefore, a SOWI Agency cannot be an affiliate or a member agency of United Way or have donors earmark United Way donations to their local Agency.

On occasion, SOWI receives unsolicited United Way donations (i.e., someone writes "Special Olympics Wisconsin" or a specific SOWI Agency name on the contribution form). In this instance, the donor is giving to United Way and United Way in turn contributes to SOWI. This money goes into the general SOWI operating funds at the Regional level whenever possible and supports the cost of training and competitions which allow all athletes an opportunity to train and compete. Due to inconsistencies in donor information provided by United Way, administrative fees deducted from these contributions, and delays in receiving funds, it is not manageable for this money to go to the local Agency.

Sometimes corporations will match employee United Way donations (as described above) and may write their checks directly to the local Agency. This money comes directly from the corporation to the local Special Olympics Agency and doesn't pass through the United Way system, and therefore, may be collected and spent by the Agency for allowable SOWI expenses.

WORKING TOGETHER: PROTECTED CONTACTS

The Protected Contacts list has been started in response to the feedback SOWI has received from companies and businesses statewide. When a company/business is solicited from an Agency, Games Management Team, Regional program, and the Headquarters office, they have no way to ascertain which “Special Olympics” requests are for a State or local event, or which may be more time sensitive or take priority – or in some cases, which are legitimate. The Protected Contacts list has been created to help improve communication and coordination and will be updated annually. Please respect the following existing relationships by contacting the Headquarters or Regional office before contacting the sponsor. In turn, if an Agency has an existing relationship with a sponsor, please notify your Region office so SOWI Development staff can respect your existing relationships. By working together at all levels, we can best honor donor intent and receive the maximum potential gifts for our efforts.

Note: Businesses, corporations or organization’s that have multiple sites or operate statewide, nationally or internationally, as well as foundations or police organizations/associations may not be solicited without prior approval from the Headquarters office.

Statewide

American Family Insurance
AT&T
Any Law Enforcement Agency
or Organization
Buffalo Wild Wings
Charter Communications
Coca-Cola
Delta Dental
Dept. of Corrections
Dunkin’ Donuts
Duplainville Transport
Focus on Energy
Fox Sports
Hu Hot
Hydrite Chemical
Independent Operator Inc.
JX Enterprises/Peterbilt WI
Kiwanis
Knights of Columbus
Kwik Trip
Milwaukee Brewers
N&M Transfer Company
Pepsi
Plexus
Quad/Graphics
Red Robin
Sentry Insurance
SOWI Board of Directors
SOWI Staff
SPAN Publishing
Stephan & Brady
T. Wall Properties
Tavern League of Wisconsin
TCI
Texas Roadhouse
TTI, Inc.
The Stan Group
Truck Country Freighting
United Health Care
University of Wisconsin (all
campus’s)
Wal-Mart
Wally Tielenas Memorial Fund
Waupun Truck-N-Show
WEL Companies
WI Motor Carriers Assoc.
Worzalla Publishing
Wisconsin Professional Police
Association

North Central Region 2

Bull’s Eye Credit Union
Church Mutual Insurance Co.
Hardees
Pool People
Prosthetic Laboratories
Trig’s Food & Drug

Indianhead Region 3

Andersen Corporate
Ann Marie Foundation
Domer Foundation
Edward Rutledge Charity
Mega Charities
Mega Foods
Mega Holiday
Xcel Energy
Xcel Energy Foundation

Fox Valley Region 4

Bemis Company Inc.
Best Buy
Community First Credit Union
Cousins Subs
Express Convenience Centers
Festival Foods
Faith Technology
Guardian Life
Jewelers Mutual Insurance Co.
JJ Keller & Associates
Jones Sign
Kraft Foods
Kimberly Clark
Miles Kimball
Miron Construction
Papa Murphy’s
Sara Lee Foods
Secura Insurance
Strategies
Thrivent
ThedaCare
US Oil

Northeastern Region 5

American Foods Group
Beyond Abilities
Cousins Subs
Favre Fourward Foundation
Gazette Foundation
Green Bay Packers Org.
Jones Sign
KI

Oneida Group
Oneida Tribe of Indians of WI
PMI
Schneider National
Smithfield Beef Group
WI Hospitality Group

South Central Region 6

Baker Tilly
Coliseum Bar (Madison)
Cousins Subs
Summit Credit Union
UW Health

Southeastern Region 7

Affiliated Foods Midwest
Aqua Fun Pools, Inc.
Brat Stop
Estudio LaStoria
Ingram Enterprises
Insinkerator/Emerson
Kenosha News
Marriott Hotel-Racine
Racine Journal Times
Razor Sharp Fitness
Rustoleum
The Waterman, Inc.
Thermo King of Southeast WI
Time Warner Cable
WIIL Rock/WLIP
WRJN/WEZY

Greater Milwaukee Region 8

Anthem Blue Cross & Blue
Shield
Anytime Fitness
Chancery
Compass Properties
GE
Gilbane Co.
Highland House
Indiana Insurance
Matty’s Bar & Grille
Milwaukee Electric Tool
Qdoba
RW Baird
Red Robin
The Starr Group
Waukesha Engine
Wells Fargo
WE Energies

THE ABC'S OF FUND RAISING

Special Olympics Agencies are encouraged to raise funds in support of their local programs.

The SOWI Development staff has created opportunities for Agencies to participate and earn money through several statewide events. See the table below to determine your Agency's best fit.

Event	Time Period	Who can participate	How is money raised	Where does money go
Polar Plunge	February - March	Anyone	Solicit pledges and jump in lake	25% of money raised by Agency stays in Agency
Final Leg – Law Enforcement Torch Run (LETR event)	March – Summer Games	Athletes and Law Enforcement Officers	Sell LETR t-shirts or other souvenirs as applicable	100% of money to Regional office, and incentives to individuals OR 75% of money to Region and 25% to Agency (no incentives earned for the individual)
Perfect Split	August –December	Athletes	Solicit pledges for a bowling “non-event”	100% of money raised by Agency stays in Agency

The Special Olympics offices across the state will work to provide whatever assistance possible to make fund raising “fun” raising for Agencies. Assistance may include:

- Sample proposals
- Sample letters of solicitation
- Sample and recognition ideas
- Lists of successful fund raising events or promotions
- The ability to brainstorm with other Agency managers and coaches from around the state and the Midwest
- Review event plans and budgets and provide feedback and suggestions

The Most Important Thing to Remember in Fund Raising is that People Give for Three Reasons:

- Because they support the program or the cause
- Because of how they are asked or who asks them
- Personal reasons (direct stake in the program such as an acquaintance with an athlete)

Every good fund raiser needs to promote the cause in a clear, emotionally appealing way and to select appropriate people to deliver the message or in other words, “make the ask.” Any good fund raising campaign will also find a way to recognize, promote and thank its contributors.

Polar Plunge® for Special Olympics

In order to comply with SOI's guidelines below and to ensure risk management, all Polar Plunge events must be organized through the Special Olympics Regional offices. No Special Olympics Agency can organize a Polar Plunge event, but can participate in the Regional Plunges to raise money for your Agency.

As the owner of the Special Olympics Marks, Special Olympics, Inc. (SOI) is responsible for registering, protecting and enforcing all of SOI's ownership and related rights to the use of the Special Olympics Marks and the goodwill and value associated with them. SOI is therefore exclusively responsible for registering or recording all trademarks, service marks, copyrights, and all other recordable interests in any intellectual property comprising the Special Olympics Marks with the appropriate legal or governmental entities throughout the world, and for filing and prosecuting all actions against third parties for misappropriation, infringement or other misuse of the Special Olympics Marks or other intellectual property associated with Special Olympics.

Should SOI ever be challenged by the U.S. Patent and Trademark Office to show that it has properly protected SOI's Marks it would be necessary to illustrate that the specific Mark was used consistently. It is for this reason that all Special Olympics Programs adopt the POLAR PLUNGE Graphic Guidelines and to use only the tagline “Freezin’ for a Reason”.

FUND RAISING – HOW TO ASK FOR MONEY

- 1) Make a cash or in-kind contribution yourself, and let them know . . . *as a coach, I volunteer more than eight hours a week during training.*
- 2) Ask in person when at all possible. *Using the phone or writing a letter makes it easy for you, but it also makes it easy for them to say NO. Reminder: Due to our SOI direct mail contract, Agencies are not allowed to organize their own direct mail campaigns by sending letters to **individuals** asking for outright financial donations.*
- 3) Practice your “ask” or “pitch” in front of the mirror or with a friend.
- 4) Tell the truth, don’t exaggerate. *Giving to Special Olympics will not solve world hunger nor will Tim Shriver write a personal thank you!*
- 5) Stress the cause . . . not the organization. *Causes are emotionally appealing; organizations are brick and mortar.*
- 6) Have your facts in order, or better yet, create a fact sheet on your own Agency (an Agency Fact Sheet template is available through the Program office). *How many athletes are served? What sports do the athletes compete in? Have any of the athletes attended a World or National Games? What are the ages of the athletes? Do you have a booster club? What geographic part of the state does your Agency cover?*
- 7) Tell them why you are involved or committed.
- 8) Don’t talk them into saying YES, but instead remove the reasons to say NO.
- 9) Avoid putting other causes down and avoid saying such things as: *“Give the money to us and not the local Region office or Headquarters office. We never see that money.” That shows a lack of teamwork and a selfish attitude that often won’t appeal to donors!*
- 10) Avoid “bail out” pleas . . . no one likes to support a sinking ship! *We spent all of our money on these cool jackets and now our athletes will run barefoot if you don’t give!*
- 11) Meet the donor’s needs for information and facts. *Does the donor request a financial statement from SOWI? Answer his/her questions and they will answer with a YES!*
- 12) Be yourself.
- 13) The #1 reason why people don’t give . . . they weren’t asked. *You are not asking for yourself. If you really believe in the value of Special Olympics, why not give other people the opportunity to be a part of something so important and meaningful.*
- 14) If you are asked a question about Special Olympics and you don’t know the answer, don’t make one up! Create an opportunity to get back in touch with the potential donor by saying, “I don’t know the answer but I will find out and get back to you. When would it be convenient to call?”

Tips to Remember when Asking for Donations

1. Be specific: what do you want?
Example: “We need to raise \$800.00 to buy new uniforms for the 20 members of our basketball team” or “transportation expenses for our athletes to participate in three competitions this year will cost \$1,000.” Avoid: we need money for our athletes.
2. Target who you will be approaching. Ask yourself, who has money in this community, and who would benefit from being associated with Special Olympics? Now draw up a list:
 - a. Don’t overlook your friends and relatives or the friends and relatives of the athletes.
 - b. Business people: bankers, morticians, doctors, chiropractors, lawyers, dentists, auto dealers, insurance companies, protected contacts, etc.

- c. Organizations: Lions, veterans groups, local business associations, student council and other student groups, etc. Call or go to the local chamber of commerce for a list of groups and organizations in your community and the surrounding area. Don't overlook using the telephone book.
 - d. Church groups
 - e. Look for ways to double what you make. For example, your local grocery store may double what you make on a brat sale in their store. Lutheran Insurance and Catholic Insurance companies often double as well.
3. Decide how much you will ask for.
 - a. This is tricky. Ask too little and you might get too little; ask too much and very few may respond. The length of your potential donor list may dictate how much you'll ask for (if you have five people and need \$1,000, obviously you wouldn't ask for \$25 from each).
 - b. You might figure out how much it costs for each athlete to participate in your program and ask for the donor to sponsor an athlete for the year for that amount.
 - c. If you have a long list of possibilities, ask for \$20 from each and you'll probably get much more than if you had asked for \$25. According to studies, people will give more than \$20 if you ask them for \$20 and just \$25 or less if you ask for \$25.
 4. Before writing the letter or calling, decide what you will give in return.
 - a. Call the local newspaper and ask what they charge if you take out a thank you ad. In many cases, the paper will match you dollar for dollar (meaning you can end up with a pretty nice ad).
 - b. Take the inexpensive way and write a letter to the editor thanking the donors (if you think they will publish it).
 - c. Think about what else you can do for them that lets the community know that they support your program (remember you can't put their name on the back of your uniforms).
 5. When approaching someone in business, keep the following facts in mind:
 - a. Remember that your local businesses get hit all the time. You need to show them what having a relationship with Special Olympics can do for their business. Point out the following facts:
 - i. Special Olympics retains a favorable name recognition among 95% of the US public.
 - ii. According to *The Chronicle of Philanthropy*, Special Olympics is America's Most Credible Charity and was ranked one of America's Best Run Charities by *Financial World Magazine*.
 - iii. The 1994 Cone/Rope Benchmark survey on cause-related marketing reported that:
 1. 84% of adults believe cause-related marketing creates positive company image
 2. 78% would be more likely to buy a product associated with a cause they care about
 3. 66% would switch brands and 63% would switch retailers to support their cause
 4. 54% would pay more for a product that supported a cause they care about
 - b. Between athletes, donors and volunteers, Special Olympics touches the lives of one in every six families in America.
 6. Use correct grammar and spelling, and be specific ("five people" is more specific than "some people").

Tips for Securing Major Sponsors for a Special Fund Raiser

You need to put together a package that will attract a sponsor. Begin by asking “what can we offer?”

- Draw up a list of potential sponsors and then decide who you want to approach. Know how much you want for a sponsorship before you ask. The cost should include cash. You can approach by saying give us half in cash and the other half in product or services.
- Advertising and association with Special Olympics is the big carrot for a sponsor. They will want to know (though they will not ask you) how much they will get for their sponsorship in terms of advertising.
- Get publicity lined up first:
 - Ask your local radio station to be one of your media sponsors – leave knowing approximately how often they will advertise your event, and if they are willing to list your major sponsors on the ad.
 - Ask the local newspaper to be a media sponsor – leave knowing how many ads they’ll put in for you, and if they are willing to list major sponsors.
 - Consider making up posters to promote your event. Figure how many you will put up, knowing that you will put major and supporting sponsors on them.
 - If you are going to have event t-shirts that you will give to all who participate, that is another way to put sponsor’s names on something. Tell the sponsor how many shirts you will be giving away. Remind potential sponsors that our shirts are worn all the time and seen everywhere – this gets their name and association out to the public.
 - Add in the value of anything else that you’ll have that will have a sponsor’s name on it or will give them exposure as being associated with Special Olympics.
- Make sure to give a deadline to a potential sponsor for when you need to know by.
- Make sure you receive the money before you have started your publicity of the event – it can be very difficult to get afterwards.

FUND RAISING EVENT APPLICATION

**Special Olympics Wisconsin
FUND RAISING PROJECT APPLICATION**

Name of event: _____

This event is on behalf of: _____
Local Agency

Individuals or organizations involved in event: _____

Event date(s): _____

Give a brief description of the event: _____

Is a raffle being held in conjunction with this event? _____No _____Yes*

*If yes, see raffle requirements in Fund Raising section of the Agency Manager Handbook

Will the Special Olympics name or logo be used?

_____No _____Yes (If yes, attach a sample of material(s))

Estimated dollars to be raised (gross income): \$

Estimated expenses: \$

Estimated dollars to local Agency: \$

Submitted by: _____
Name Title

_____ Mailing Address Telephone

_____ Email Address

RETURN TO REGIONAL OFFICE 30-60 DAYS PRIOR TO EVENT

Approved: _____
Regional Director of Development Date

SPECIAL EVENT SUMMARY

Special Event Summary

Agency/Region: _____ Agency/Region Staff Time Involved: _____

Event: _____ Number of Volunteers: Prior to Event _____

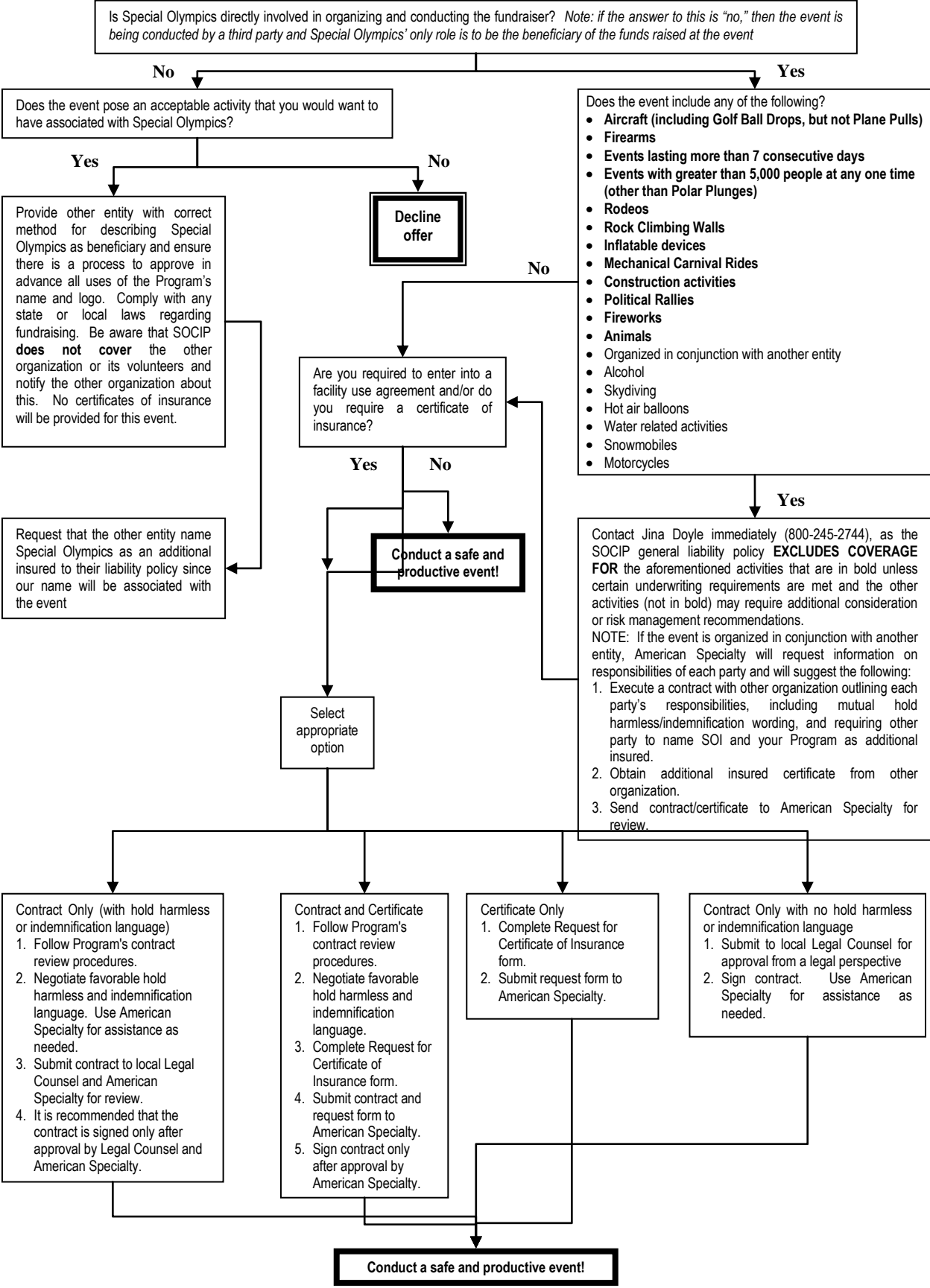
Dates: _____ Day of Event _____

List of Corporate Sponsors

<u>Name</u>	<u>Cash Actuals</u>	<u>In-Kind Actuals</u>
1.		
2.		
3.		
4.		

Expenditures		Income		
	Cash Actuals	Source (pledges, auction, etc.)	In-Kind	Cash Actuals
Prizes		1.		
Event Food		2.		
Printing/Photography		3.		
Facilities		4.		
Appreciation/Hospitality		5.		
Administrative		6.		
(Insurance)		7.		
(Permits)		8.		
(Postage)		9.		
		10.		
		11.		
Incentives/Souvenirs		12.		
Sales Tax		13.		
Miscellaneous		14.		
Total Expense	\$	Total Income	\$	\$
Net (Income - Expense)	\$			
Cost to Raise a Dollar : (Total Expense ÷ Total Income)				
Intangible assets of doing this event:				

INSURANCE NEEDS FUND RAISING EVENT FLOWCHART AND EXPLANATION



The following provides an overview of the exclusions and requirements that apply for certain fund raising events and activities. This overview also provides information on exclusions and requirements that are not restricted to fundraising but that may apply at certain fund raising or sporting events. If you are considering conducting an event or activity that fits into any of these categories, you must contact Jina Doyle, Special Olympics Risk Manager, (800-245-2744) to discuss risk management plans and determine whether the event can be covered under the Special Olympics Corporate Insurance Program (SOCIP) or a separate Special Event policy.

Please note that the exclusions do not necessarily preclude Programs from securing coverage for these events, as Special Olympics General Liability insurer is willing to consider inclusion of certain excluded events under the Special Olympics Corporate Insurance Program or via a separate Special Event policy if the Program takes appropriate risk management steps to make the risk acceptable. **However, it is essential for U.S. Programs to be aware of the exclusions and coverage requirements so that any excluded events can be discussed and an approach agreed upon well in advance of the event.** Otherwise, a Program will run the risk of holding an uninsured event.

Fundraising Exclusions and Requirements

The following exclusions and requirements apply specifically to Special Olympics fund raisers. Please note that events at which fund raising activities are included but are not the primary purpose of the event shall not be considered a fund raising event and shall not be subject to these exclusions and requirements. For example, selling t-shirts at State Games does not make State Games a fund raising event for the purposes of these exclusions and requirements.

- **Over the Edge** – Over The Edge Fund raising events are not automatically covered under the SOCIP policy. Certain underwriting requirements must be met in order for coverage to apply. There is also an additional premium due of \$2 per participant that actually goes “over the edge.”
- **Golf Ball Drops** – Any activities involving aircraft (i.e. helicopters) at a golf ball drop are excluded from the policy unless the following underwriting requirements are met:
 - Special Olympics, Inc. and the U.S. Program organizing the event are held harmless and indemnified by the aircraft service via a written agreement.
 - Special Olympics, Inc. and the U.S. Program organizing the event are named as an additional insured on the aircraft service's owned aircraft liability policy with minimum liability limits of \$10,000,000.
 - Individual(s) dropping the golf balls are employees of the aircraft service and are covered by workers' compensation insurance, or, if the individual(s) responsible for releasing the golf balls are Special Olympics volunteers, the volunteer must sign a release of liability waiver that is specific to the golf ball drop.
 - The Special Olympics Program organizing the event has confirmed with the venue that the area in which the balls will be dropped will be completely free of participants, spectators, and employees during the drop. Special Olympics, Inc. and the U.S. Program organizing the event are held harmless by the venue via a written agreement for any property damage caused by the golf balls.
- **Firearms** – Activities involving firearms are specifically excluded from the policy.
- **Rodeos** – Rodeos are specifically excluded from the policy.
- **Political Rallies** – Political rallies are specifically excluded from the policy.
- **Fundraising Events Lasting More than Seven Consecutive Days** – These events are excluded (unless specifically approved and endorsed to the policy). Please note that the number of days does not include days leading up to the event in which participants are soliciting funds in preparation for the event.
- **Fundraising Events with Greater than 5000 People (Volunteers, Participants, and Spectators) at any One Time** – These events are excluded (unless specifically approved and endorsed to the policy).
- **Animal Liability Sub-Limit** – Bodily Injury arising out of the actual or threatened injury from an animal owned by or in the control of Special Olympics (an example would be a petting zoo at a fundraising event) is subject to a sub-limit of \$25,000 per occurrence with a \$50,000 policy aggregate.

Other Policy Exclusions and Requirements (Not Restricted to Fundraising)

The following exclusions and requirements apply with respect to all Special Olympics events, fund raising or otherwise.

- **Mechanical Rides** – In order to have coverage for mechanical amusement devices designed to carry passengers that are used as part of a fair or carnival to raise money for SOI or a U.S. Program, the following underwriting requirements must be met (same as inflatable slide devices and rock climbing walls).
 - The ride must be owned, installed and operated by another party, **and**

- Insured by the owner at liability limits of at least \$1,000,000 per occurrence and the contracting U.S. Program is named as additional insureds on such insurance.
- **Rock Climbing Walls & Inflatable Devices** - The SOCIP general liability policy **only** provides coverage for inflatable slide devices and rock climbing walls **if**:
 - The device is owned, installed and operated by another party, **and**
 - Insured by the owner at liability limits of at least \$1,000,000 per occurrence and Special Olympics, Inc. and the contracting U.S. Program are named as additional insureds on such insurance policy.
 - Coverage is only provided for other inflatable devices (other than inflatable slide devices; such as bouncy rooms) **if**:
 - The device is owned and installed by another party, **and**
 - Insured by the owner at liability limits of at least \$1,000,000 per occurrence and Special Olympics, Inc. and the contracting U.S. Program are named as additional insureds on such insurance policy.
- **Construction Activities** - Construction activities involving real estate (such as Habitat for Humanity or an addition to your office space) or the erection or disassembly of bleachers/grandstands conducted by or on behalf of Special Olympics is not covered under the SOCIP general liability/excess liability policies.
- **Aircraft** - Other than airplane pulls and golf ball drops (as described above), any activities involving the use of aircraft are excluded.
- **Watercraft** - Losses arising out of the use of an owned watercraft or a non-owned watercraft longer than 75 feet are excluded.
- **Fireworks** - The following underwriting requirements must be met in order to have coverage under the SOCIP general liability policy for fireworks. If they are not met, you will need to secure coverage locally in order to have coverage.
 - The individual or entity performing the fireworks has and maintains valid commercial general liability coverage in the amount of at least \$1,000,000 that covers fireworks, **and**
 - The individual or entity performing the fireworks names SOI and the U.S. Program as an additional insured to such policy.