

# **SECTION 8**

## **DEVELOPMENT & MARKETING**

**FUNDRAISING & DEVELOPMENT**

**RAFFLES**

**SPONSORSHIPS**

**LETR**

**FUNDING SPLITS**

**PLANNED GIVING**

**THIRD PARTY FUNDRAISERS**

**PUBLIC RELATIONS**



# FUNDRAISING AND DEVELOPMENT

## Board Policy on Fundraising Philosophy

Special Olympics Michigan will participate together in a spirit of cooperation to raise funds to adequately support, on a long-term basis, the programs of Special Olympics at all levels.

Donated funds, materials and services support the program of Special Olympics Michigan. Because of the high interest in local participants, financial support is best generated at the local level. Funds for the state events may be generated through major statewide fundraising programs, major corporate involvement, area assessments or fees, foundation grants and sponsorship programs.

Amended June 2, 2005

## General Fundraising Guidelines

Successful fundraising follows these basic guidelines:

1. Fundraising events and activities should present a positive image of Special Olympics Michigan and support the purpose and mission of Special Olympics.
2. Fundraising activities and any solicitation activities in overlapping Areas must be approved by the Chief Executive Officer (CEO) or their designee.
3. SOMI must restrict its fundraising activities to the State of Michigan.
4. Areas may not conduct mail solicitations of individuals unless approved by the CEO or their designee. This action would violate our contract with SOI.
5. Grant requests should only be made within your respective area. Areas can contact grant writer Nancy Joseph-Recknagel at reckn1nl@cmich.edu or (248) 538-1598 for assistance.
6. Advertising for fundraising events also must make clear to the general public who will receive the benefits/proceeds from the event. For example, if a golf outing is held to benefit SOMI, the golf outing's promotions should say "to benefit Special Olympics Michigan or "to benefit Special Olympics athletes."

7. Fundraising events and projects should be conducted in a cost-effective manner with consideration for the cost to raise a dollar. Expenses incurred as part of fundraising activities should not exceed 25% and should try to be kept at 15% or lower. (As recommended by the Michigan Attorney general)
8. Outside, or third-party organizations or corporations raising money on behalf of SOMI should be strongly encouraged to follow this 25% guideline as well. Additional third-party rules involving receipting are available from the state office.
9. Names of anyone requesting to be excluded from the fundraising list needs to be given to the state office by December 31<sup>st</sup> annually.
10. Note (\*) The SOMI staff will have primary responsibility for relationships with statewide companies. This means that we will be creating sponsorships and growing relationships with companies that have previously dealt with various levels of the organization. It is hoped that through cultivation of the total relationship, we can better serve and hopefully grow that contribution.

## Guidelines for Families Raising Funds to Attend National and World Games

Family members, employers of family members, fraternal groups, or others may conduct fundraising events to offset costs of family members to attend National and World Games events.

The fundraising event purpose must state clearly that it is to benefit the family - not the athlete of Special Olympics Michigan.

Any publicity, in any medium, print, radio, etc. must clearly communicate that the purpose of the fundraising event is to benefit the family – not the athlete of Special Olympics Michigan.

Notification of the fundraising events is to be made to the Area Director for their awareness, whom will contact the appropriate state office staff for their awareness as well.

## **Board Policy on Donor Restricted Gifts**

Due to legal obligations, gifts given by donors that are restricted in any way are to be received by the legal entity Special Olympics Michigan, Inc. These gifts include permanently restricted or temporarily restricted funds. It is the fiduciary responsibility of the Board of Directors to receive these gifts, correspond with the donor as to the intent of these funds, and to ensure that they are used accordingly to the donor's wishes.

Reapproved June 2, 2005

## **Tobacco and Alcohol Policies Association of the SOMI name and logo with tobacco products and alcoholic beverages**

SOMI shall not allow the manufacturers or distributors of tobacco products, alcoholic beverages, or non-alcoholic beer products to publicly or visibly connect the name or trademark of their products with Special Olympics in any way. This rule applies to all events including fundraisers.

The above provision does not preclude SOMI from:

1. Accepting blind (unacknowledged) and unidentified contributions (cash or in-kind) from such manufacturers or distributors.
2. Allowing such manufacturers or distributors to link the trademarks of their products other than tobacco or alcoholic beverages with Special Olympics.

Alcohol distributors can sponsor Special Olympics fundraising or special events (not games or competitions) as long as the company name does not have a beer or alcohol brand, or any alcohol, beer, wine words or references. Special Olympics, Inc. has final authority on these issues. SOMI must contact SOI if there is any question of its ability to accept funds or other support from a business associated with tobacco products or alcoholic beverages. SOI's decision on the matter is binding.

## RAFFLE RULES AND REGULATIONS

**All Raffle Licenses are required to come through the SOMI state office because of the rules and regulations of the Charitable Gaming Commission and our Auditors.**

Games of chance are controlled by the Charitable Gaming Division of the Michigan Lottery. The website for this is [www.michigan.gov/cg](http://www.michigan.gov/cg). This website has everything you need to know about holding raffles and the rules, regulations and guidelines to follow. You can get the raffle license application from this website. We are no longer able to pull individual area Millionaire Party (Texas Hold 'em) licenses. There are also IRS rules and guidelines we must follow so please read through these and be sure you stay in compliance with all these steps for holding a raffle. Being able to continue fundraising through this great avenue depends on everyone adhering to these rules.

### SOMI Receives the Raffle Application:

- The Area completes page 2 of the raffle application and submits it to the Development & Marketing Secretary at the SOMI state office. A check will be cut from the area account to cover the license fee. The secretary will then get the board chair signature necessary for Page 1. If you need help or have any questions regarding raffles, please contact the Development & Marketing Secretary at 989-774-3911. You can fax it to (989) 774-3034 but please follow up with a phone call ensuring the state office received your application and check request.
- On a separate sheet of paper with the fax or in the email please give the dollar amount value to each prize you are raffling.
- If conducting a raffle where you are having raffle tickets printed (not 50/50 tickets), please submit what your ticket is going to look like. This must accompany the Raffle License Application. **Note: when creating any type of flyer for your event, it must receive approval from the Development & Marketing Secretary.** Note: Tickets and advertisement flyers cannot be printed until after the license number has been issued. The license number must be printed on these materials.

- The state office will keep a copy of the application and the Development & Marketing Secretary will enter it into our raffle database.
- When you receive the license through the Charitable Gaming Division, you must then let Development & Marketing Secretary know the raffle license number by faxing a copy of the license. This will be entered into the raffle database.

Please note: It takes 6 weeks for the Charitable Gaming Division to process a Raffle License Application. The SOMI state office needs at least 2 weeks prior to that to cut the license fee check and to obtain the board president signature so make sure to plan your events at least 8 weeks out. There is no way around their process. We cannot rush a license through. Please plan your event accordingly. Allow enough time to print and sell your raffle tickets. Do not wait to submit a raffle license. Once you have all the information needed you can apply 18 months in advance of your event. If there are any changes to the original application, then it must be submitted in writing to the Charitable Gaming Division. Remember: Raffle tickets must have the license number on the ticket. If you are raffling off a car, snowmobile or anything with a value equal to or greater than \$5,000 you should list on the ticket that the winner is liable for all taxes. Any large raffles like these please notify the state office before your event and we can do the calculation for you and let you know the amount that needs to be withheld from the winner prior to giving them the prize as required by the IRS Reportable Income regulations. The amount we have to withhold currently is 25% of the retail value of the prize. This amount is subject to change.

### During the Raffle:

- Display the raffle license in clear view. (If you can tack it or tape it to a wall that would be best).
- Whomever you selected as the event Chairperson must be at the event. That person is responsible for all paperwork involved. They must be a volunteer, board member or staff of our organization for at least six months and have a Volunteer A form on file.
- Once the winner is drawn immediately have them sign a copy of the **Prize Distribution Form** which you will get from the Development & Marketing Secretary prior to your event. A sample of this form is in the

forms section in the back of this guide. This form **MUST** be filled out completely with the winner's name, address, phone and **social security number** and signed by them.

Please have **all** raffle winners complete this form before giving them their prize. If they refuse to sign, then pick another winner. We must adhere to the IRS guidelines and SOMI's Auditors. If the prize is not reportable, we will not send them a W2G.

- Make a copy of the winning ticket(s) to send in with the Prize Distribution Form and the Raffle Financial Statement.

### After the Raffle:

- You **must** submit the completed Raffle Financial Statement to the Development & Marketing Secretary. **The financial statement is due to Charitable Gaming Division by the 10<sup>th</sup> day of the month following the event.** Keep in mind the SOMI state office needs time to obtain the board chair signature on the financial statement. Delaying this procedure could hold up any future raffle license applications. If there is an outstanding Financial Statement due to the Charitable Gaming Office, they will not issue any further raffle licenses until the said (late) Financial Statement is submitted. (Assistance is available for completing these forms). Make sure you write down the cost of the license and the cost of printing any tickets. All information will be entered into the state office raffle database.
- Submit a copy of the completed Prize Distribution Form to the state office.
- Submit a copy of the winning ticket to the state office.

### The IRS Requirements:

**Their rules require the completion of a W2G (income statement).** This is the form the IRS wants for reporting gambling winnings, which includes raffles. It is summed up as follows:

1) If the prize is valued at greater than \$600 and is at least 300 times the ticket price for the raffle, it is reportable as income.

Ex a.) \$5 ticket price, with a \$500 prize. Not reportable because the prize is not over \$600.

Ex b.) \$5 ticket price, with a \$1,200 prize. Not reportable, even though it is over \$600 it is not over 300 times the ticket price of \$5(\$1,500).

Ex c.) \$2 ticket price, with a \$650 prize. Reportable, it is over \$600, and 300 times the ticket price (\$600).

2) If the prize is **over \$5,000** and 300 times the ticket price we are liable for income tax withholding on the raffle prize. The **amount we have to withhold currently is 25%** of the retail value of the prize. This amount is subject to change.

Ex. a. \$10 ticket price, \$6,000 prize. This is reportable to the IRS and we would have to withhold \$1,500 from the prizewinner **before** the possession of the prize.

**Only one person can be listed as the winner. One person must report the income.**

SOMI requires **all** winners fill out a Prize Distribution Form (please see form on page 198 before **any** prizes are awarded. As you can see by the previous formula, there are several different ways and formulas on reportable income on a prize. We must have the Prize Distribution Form on file to be in compliance with the Charitable Gaming Rules, Auditors, and the IRS requirements. This will be extremely helpful at the end of the year when it is time for SOMI to send out W2G's. SOMI can do the calculation at that point and see whether it is reportable or not. Additionally, if you have any prizes over \$5,000, please let us know before the drawing date and we can do the calculation for you and let you know the amount that needs to be withheld from the winner prior to giving them the prize as required by the IRS Reportable Income regulations.

For Raffle rules, regulations or questions please contact:

The Development & Marketing Secretary at 989-774-3911

For IRS rules, regulations or questions please contact:

Roger Yob  
[Yob1ra@cmich.edu](mailto:Yob1ra@cmich.edu)

Please note: There are different rules for a Millionaire Party License. Areas can not apply for licenses.

## Frequently Asked Questions

- 1.) Would I need a Large Raffle License if the total value of **all** prizes awarded in one day is less than \$500.00?

Answer: No. That would be a Small Raffle License for \$15.00. A Large Raffle license is required if the total value of the prizes awarded in one day is over \$500.00.

- 2.) Do I need more than one raffle license if I am doing several 50/50 drawings on the same date?

Answer: No. If total amount of prizes is over \$500.00 you would need a Large Raffle License for \$50.00 and when filling out your application your start and finish time must correspond when you do the first and last drawings. You can do as many raffles within that time frame as you desire.

- 3.) I want to conduct a raffle and give away large cash prizes but I am not sure I will sell enough tickets and am concerned I will lose money on my event. What do I do?

Answer: There is a disclaimer you can write that states if a certain quantity (you need to state how many) tickets are not sold, the drawing will revert to a 50/50 raffle with the minimum prize of \$xxx (indicate dollar amount) awarded. This must be on the original application or you have to request in writing not less than 20 days before the gaming event. Note: The Charitable Gaming Division needs 10 days in advance a written cancellation for an event.

- 4.) If I have a 50/50 raffle and have several drawings but my prizes are worth less than \$100.00 would I need a raffle license?

Answer: If the total value of ALL raffle prizes awarded during the entire day does not exceed \$100.00 you would not need a license and there is no presale of tickets and it is a single gathering event. If the total value of prizes awarded exceeded \$100.00 then you would need a small raffle license for \$15.00.

Example: Drawing 4 separate tickets and awarding \$30.00 to each winner constitutes a small raffle license because the total

prizes awarded in a single day would be \$120.00 over the \$100.00 allotted.



**Alcohol Distribution at Events**

SOMI volunteers may not sell alcoholic beverages at any event including fundraisers unless we first purchase a liquor license and liquor liability insurance for that event. Events conducted by SOMI that offer alcoholic beverages should follow the risk management recommendations of SOCIP.

**Liquor Licenses**

Please contact the state office at 989-774-3911 for insurance and Liquor Control Commission information.



## **Tax-Exempt Purchases/Tax I.D. Number**

The Special Olympics Michigan tax-exempt identification number is only to be used when a representative of SOMI is purchasing items for use in a Special Olympics program. Outside groups or individuals are not authorized to use this number. Both the IRS Federal Identification Number and State of Michigan certificate for tax-exempt sales as issued to Special Olympics Michigan are to be used by SOMI only.

## **Issuing Receipts**

The SOMI state office will issue receipts for all contributions received. If applicable, donors can use these receipts for a deduction on their taxes as verified by their tax preparer. It is a Special Olympics Michigan procedure to issue receipts to all donors unless the money received is for a payment of services, payment for return on cash advance or for reimbursements.

Receipts should only be given to the "direct donor." If donations are received through a third party, SOMI must issue the receipt to that third party. For information or receipting third-party entities, contact the CFO.

For example, if the Jaycees hold a carnival event and they present a check to SOMI, then SOMI would issue a receipt to the direct donor, in this case, the Jaycees. SOMI would not issue receipts to the many individuals who attended and gave money at the carnival.



## **Association with Other Organizations**

### **Prohibition on Forming Separate Entities**

SOMI is prohibited from establishing or affiliating with any other corporation, partnership, foundation, trust, supporting organization, endowment fund or endowment organization, or any other entity without SOMI's prior written consent. Any request for affiliation must go through the SOMI State Office before the request is sent to SOMI.

## **United Way**

Programs considering participation in a United Way campaign must ensure that participation will not result in any "fundraising blackout" time periods or other obligations that would conflict with Special Olympics Michigan's obligations under the integrated direct mail program (IDMP), other fund raisers conducted by the state, national and international offices, sponsorship activities, or the General Rules.

Contact SOMI for more information prior to applying for United Way funds. The President/CEO must sign all United Way applications and contracts.



## **Partnerships**

SOMI is authorized by SOI to seek Partnerships. However, Special Olympics, Inc. also has existing and developing relationships with corporations and other organizations that provide financial and other support to SOI and its programs. To prevent conflicts or interference with these relationships, SOMI programs must adhere to the following policies in their contacts with corporate and other organization Partners:

## **First Option to SOI Partners (FirstGiving)**

When seeking corporate support for an event or program, Special Olympics Michigan must check to see if that company is in competition with any of SOI's Partners. (SOI is required to give written notice to SOMI of its exclusive Partners and other fundraising activities in Michigan.) If so, SOMI must first offer SOI's corporate Partners the opportunity to support that event or program. (The General Rules describe in detail how to approach SOI's Partners.) If SOI's corporate Partners decline the option, then SOMI may offer the opportunity to other corporations or organizations.

## **Identification of Partners**

Corporate Partners or other organizations, which support SOMI, shall be recognized in signage or promotional materials as a "partner" or "supporter" of that SOMI event or program. SOI does not permit any corporate partner or organization to add its company or product name to the name of any Special Olympics games, tournaments, events, demonstration, training event, or other activity excluding fundraising events.

Example of unacceptable Partner identification: Ameritech State Summer Games or Coca-Cola Area 2 Spring Games. Example of acceptable Partner identification: Area 2 Fall Games sponsored by SpartanNash, Inc.

If a business or organization conducts its own event to benefit SOMI, the business or organization's event must be identified as such, for example, "CompanyTOCFun Run to benefit Special Olympics Michigan." Areas with any questions about appropriate wording or advertisements should contact the state office.

## **Partner Names or Commercial Messages on Athlete Uniforms**

To avoid commercial exploitation of persons with intellectual disabilities no uniforms, bibs, or other signs bearing competition numbers, which are worn by Special Olympics athletes during competition or during Opening or Closing Ceremonies of any Games, may be emblazoned with commercial names, logos, or messages. For example, if a Partner is Smith Computer Store, SOMI cannot print "Smith Computer Store," the store's logo, or its slogan, "We're high tech in your small town," on any athletes' uniforms or competition bibs.

## **General Partnership Procedures**

- The General Rules of Special Olympics, Inc. and the policies of Special Olympics Michigan shall govern all relationships. The mission of Special Olympics must be upheld.
- All contracts and Partner agreements require Special Olympics Michigan's approval and a signature from the CEO.
- Area Partnerships cannot conflict with state, national, or international contracts or agreements.
- Contract or agreement terms cannot exceed the length of the accreditation period.

## **Sponsor-A-Champ Mailings**

Areas have asked, "Can I do a Sponsor-A-Champ mailing?" The short answer is that areas **cannot send letters to individuals** but they can send a small targeted mailing to local businesses in their areas. Here is the verbiage from the SOMI and SOI (IDMP) Agreement:

IDMP will be Program's exclusive source of direct mail, residential telemarketing and online fundraising during the Term, subject to any exceptions or terms contained in the Agreement, the Procedures Document or the Online Giving Procedures.

- (a) **Exclusivity, Direct Mail.** Program shall not mail or permit to be mailed any fundraising appeal (or any public education materials that contain an explicit fundraising solicitation) to existing Donors or potential donors in its jurisdiction or any other jurisdiction, or otherwise conduct or authorize third parties to conduct any direct mail programs on Program's behalf. This

restriction includes, but is not limited to newsletters containing an appeal (e.g., Sponsor an Athlete, Support Our Summer Games, Join Our Giving Circle). Program shall not, however, be prohibited from including envelopes with language such as, "Please accept my donation to support Special Olympics [Program]" in newsletters that Program sends to stakeholders for the sole purpose of sharing Program-related information, such as information about Program activities, upcoming events, and other relevant content.

Notwithstanding the foregoing, upon receiving the prior written consent of SOI, Program may mail or permit to be mailed invitations to a fundraising event (defined only as an event for which there is a stated fee for admission or participation), provided such invitations either: (1) do not include a request for a donation other than the amount charged for attending the event; or (2) include the following statement: "I cannot attend, but enclosed is my gift of \$XX." Such solicitations may only be sent to select audiences. SOI will provide written guidance to Program on permitted events and types of audience allowed. For the avoidance of doubt, all other invitations to fundraising events, regardless of whether funds are raised at the event or in connection with that event, are prohibited under this Section 3.01. The preceding sentence shall not prohibit Program from using the mails to conduct Donor Cultivation.

- (b) **Exclusivity, Telemarketing.** Program shall not call or permit to be called in connection with any fundraising appeal (or any public education messages that contain an explicit fundraising solicitation) existing Donors or potential donors in its jurisdiction or any other jurisdiction, or otherwise conduct or authorize third parties to conduct any telemarketing programs on Program's behalf. This shall not prohibit Program from using the telephone to conduct Donor Cultivation or solicitation of Business Donors or to conduct calling by DialAmerica to benefit Special Olympics.

- (c) **Exclusivity, Online.** Program is encouraged to promote online donation form established by SOI in online and offline communications. Except as otherwise permitted in the Black-out Calendar, Program shall not process funds online (including, without limitation, one-time and monthly donations, memorial and tribute contributions, and renewal gifts) except through individual giving pages established in accordance with procedures established by SOI in the Online Giving Procedures and that SOI can track in accordance with this Agreement. Notwithstanding the foregoing, Program may participate in the following online activities: (a) friends-asking-friends events in which participants in a program-sponsored event ask friends and families to "sponsor" participants, so long as the Program does not explicitly request donations for such event be made directly to Program; (b) auctions or online merchandise shops that allow donors to purchase merchandise, so long as any donations made on such sites that do not include a purchase are made through the individual giving pages; (c) external self registered accounts to raise funds such as GoodSearch or similar programs where a percentage of the sale by a third party benefits an unrelated charity; (d) online ticket sales for in person events (e.g., Gala or golf tournament) when the purpose of the page is to process the ticket sales and Program does not explicitly request donations be made in addition to the ticket purchase; and € Donor Cultivation efforts that include a special online link to allow select individuals to make donations. The preceding sentence shall not prohibit Program from using online communications to conduct Donor Cultivation.

Notwithstanding the foregoing, upon prior written notification to the other party briefly describing the campaign, both Program and SOI may conduct up to two special fundraising efforts in the course of the year, each not to exceed a four week period, that do not use

individual giving pages (each, a **“Special Campaign”**). Revenue generated from a Special Campaign shall not be included during the times set forth in the Black-out Calendar. A Special Campaign must be a unique appeal rather than the promotion of existing campaigns. Program and SOI agree to use reasonable efforts to ensure that any Special Campaigns do not contain conflicting messages from IDMP Communications.

## **Contracts**

All fund-raising agreements entered into by Accredited Programs shall be in writing, and must include the following minimum contract protections, unless otherwise approved in advance and in writing by SOI: (which are described fully in the SOI General Rules, Section 7.07):

### **7.07 (a)**

**Approval of Third Party Use of SO Marks**  
The Accredited Program shall have, and must actually exercise in each instance, a right of advance written approval of all materials (such as promotional literature or merchandise) to be developed or distributed by any third party which will bear the name of the Accredited Program, the SO Logo (which may be used only in conjunction with the name of the Accredited Program), or any other SO Mark which SOI has licensed that Accredited Program to use. Through such approval process, the Accredited Program shall ensure that such third party fully complies with all SOI Special Olympics Official General Rules<sup>106</sup> Special Olympics ownership rights to the SO Marks, with the Graphics Standards Guide, and with other applicable provisions of the Uniform Standards.

### **7.07 (b)**

**Ownership of Accredited Program Assets**  
The Accredited Program shall retain, and be recognized explicitly by all third parties as retaining, exclusive ownership of all Accredited Program assets which will be used or developed by a third party through the use or exploitation of any SO Marks, such as ownership of all donor lists and records containing the Accredited Program's list of active or lapsed donors.

### **7.07 (c)**

**Inspection of Financial Records**  
The Accredited Program shall have the right to inspect and audit, with reasonable notice, all books and records and other financial documentation of a third party which relate to the third party's performance under the agreement, and a right to receive properly documented financial reports from the third party concerning the revenues raised from the project for the Accredited Program.

### **7.07 (d)**

**Fees and Expenses**  
The agreement must clearly identify whether the Accredited Program will be responsible for paying any fees or expenses in connection with the project, including those incurred by subcontractors or other parties who will perform services for the third party which is contracting directly with the Accredited Program, and must explicitly protect SOI from any liability or responsibility to any third party for payment of such fees or expenses.

### **7.07 (e)**

**Insurance Coverage**  
The agreement must require that the third party contracting with the Accredited Program obtain adequate insurance coverage for its activities in connection with the project, in amounts acceptable to the Accredited Program, including, but not limited to, coverage protecting the Accredited Program's interests in relation to the third party's access to donor lists, cash contributions to the Accredited Program, or other tangible or intangible assets of the Accredited Program. Special Olympics Official General Rules  
107 Special Olympics

### **7.07 (f)**

**Compliance with Laws and Voluntary Standards**  
The agreement must explicitly require the third party to comply with all laws and regulations which apply to its activities under the agreement with the Accredited Program, including, if applicable, the laws of the Accredited Program's jurisdiction governing charitable solicitations and cause-related marketing contracts, as well as all Voluntary Standards (as defined in Section 5.11), if any, which may apply in that Accredited Program's jurisdiction.

### **7.07 (g)**

**Indemnification**  
The agreement must require that the Accredited Program be indemnified by the third party

from damages, costs, expenses and attorneys' fees arising out of any claims that might be made against the Accredited Program by any party stemming from the third party's failure to perform its obligations under the contract, or its unauthorized use of any SO Mark.

#### 7.07 (h)

##### Length and Termination of Contract

The agreement must specify the length or term of the agreement with the third party, the timing and circumstances under which the Accredited Program may terminate the agreement

by providing written notice to the third party and must permit the Accredited Program to terminate the arrangement promptly if the third party defaults in performing its obligations under the agreement.

### **Benefits of Online Fundraising**

- An Online Fundraising Page allows fundraisers to ask for donations from family and friends all over the world at no cost.
- You can share your online fundraising page on social media platforms.
- Online donors immediately receive their receipt via email for tax purposes.
- You can set up email lists, track donations and customize your page.
- It is easy to send emails to update donors on your progress and remind people to donate.
- Donations made by credit card are typically 25% higher than those made by cash or checks.
- Donors are asked if they also want to cover the minimal credit card fee.

### **Online Fundraising**

SOMI accepts donations via [www.somi.org](http://www.somi.org) or at [\(800\) 644-6404](tel:8006446404). Each area should be working towards using online fundraising for their area fundraisers. Special Olympics Michigan provides an area webpage through FirstGiving to add their events. Currently there are several webpages through FirstGiving for online fundraising, examples: Polar Plunge, Statewide Events (i.e. Torch Run, Wertz Warriors and Water Warriors), CMU Homecoming 5K and Area Events. With changes in technology online fundraising is a great way to raise additional funds and collect information about individuals who are registered.

## **Law Enforcement Torch Run® (LETR)**

Law Enforcement Torch Run® is a worldwide fundraising and awareness program that benefits Special Olympics. The money is raised through community runs, t-shirt sales, raffles, Polar Plunges, Agency events, straight donations, and sponsorships. For more information contact Andrea Rachko at 1-800-644-6404.

### **Growing Your LETR Program**

If you have a personal relationship with a law enforcement/corrections officer and they are not active in the LETR, please pass along their information to LETR Liaison (Andrea Rachko) and/or LETR Director (John Card) so that they can set up a recruitment meeting which will include an invite to the Area Director as well.

Please remember that not everyone in the law enforcement/correction community is aware of what the Law Enforcement Torch Run® is about. If you encounter someone from the law enforcement/corrections community who may be interested, let us know.

Please contact the state office LETR Liaison to determine if we (LETR) have an active team captain or individual in your area. The team captain can help educate the interested officer about the LETR program.

As with any volunteer; law enforcement/corrections officers may have limited capabilities on how they may be involved, so we always approach them with a variety of ideas when we first meet with them. Starting out slow is okay. For instance, we try to get them to attend the Kickoff Conference or to a statewide event.

LETR is here to help you raise money and awareness for SOMI and will try to develop programs within your area. We will continue to do what we can to recruit law enforcement/correction officers to be involved in fundraising efforts within your area.

### **Polar Plunges**

For information on Polar Plunges please contact LETR Liaison Andrea Rachko at rachk1am@cmich.edu.



## **Funding Splits**

### **Board Policy on Funding Splits**

Funds raised will be split between the state and the areas relative to who initiated and implemented the fundraising program. The Board of Directors will establish the funding splits and methods of calculation.

Communication is a key factor in establishing and maintaining development activities that fund successful programs for Michigan athletes with intellectual disabilities. Therefore, Special Olympics Michigan's fundraising plans and goals affecting areas will be conveyed on an ongoing basis to eliminate duplication of effort and ensure that current or developing programs are not jeopardized.

Effective fundraising programs require developing and maintaining relationships with donors that are based on honest and clear understandings. This requires that all individuals seeking funds for Special Olympics Michigan programs and events concisely communicate the specific program that is a benefactor of the donor's involvement.

Developing fundraising programs that will enhance Special Olympics Michigan's positive image, purpose, and philosophy is essential to the continuation of a successful sports program for athletes who have intellectual disabilities. This requires that fundraising is structured to provide "winning" programs for the athletes and "winning" opportunities for donors while complying with policies adopted by Special Olympics, Inc. and Special Olympics Michigan, Inc.

The state office of Special Olympics Michigan will provide the programs ongoing fundraising training and support programs. The assistance will aid in the development and continuation of strong programs for all athletes throughout the state.

Areas may not raise funds or utilize resources outside of their area without approval of SOMI. Statewide corporations or foundations can only be approached after approval is given by Special Olympics Michigan.

Amended June 2, 2005



## **Planned Giving**

The language used in planned giving and estate documents is crucial to assure that the donors' intent is followed. Please contact Alison Miller at 989-774-7202 or [mille1as@cmich.edu](mailto:mille1as@cmich.edu) for guidance in speaking with anyone who contacts you regarding a planned or estate gift. She will assist the donor and the estate planning team in crafting appropriate language to use in various circumstances.



## Third Party Event Guidelines

### What is a Third Party Event?

A Third Party Event is a fundraising event that is implemented by an outside organization for the benefit of Special Olympics Michigan. There are three types of Third Party Events as follows:

- **Level One** (Community Based) – Example:
  1. A high school group wishes to conduct a car wash and give the proceeds to Special Olympics Michigan.
  2. A professional organization wishes to conduct an event (i.e. a golf tournament) and give the net proceeds (or a portion thereof) to Special Olympics Michigan. All funds will be generated from within the organization's membership.
- **Level Two** (Community Based) – A professional organization or individual wishes to conduct a golf tournament and give the net proceeds (or a portion thereof) to Special Olympics Michigan. The organization/individual plans to solicit local sponsorships and players from the community at large.
- **Level Three** (Statewide or Nationally Based) – A corporation wishes to conduct a cause-related marketing campaign whereby a portion of the sales from every product sold or service performed is donated to Special Olympics.

### Why is This Important to Me?

Third Party Events tend to be local in nature. Therefore, it is likely that someone wanting to conduct a third party event would contact the SOMI office nearest to them. Staff from all functions of our organization are contacted regarding these events. If you are contacted regarding a third party event, here is a list of do's and don'ts:

- If you are uncomfortable working with the organization/individual on the third party event contact the SOMI State Office and they will assist you or work with the individual directly.
- SOMI staff/volunteers should have **only minimal** involvement with the event (i.e. attend the event for the photo opportunity of receiving a "big check"). If SOMI staff/volunteers are more involved than this, there is a possibility that this event could be construed as a SOMI event and any liability arising from the event would fall to SOMI.

- The sponsoring organization/individual is responsible for all sales, marketing and promotion of the event. SOMI should never provide postage, blank letterhead, SOMI prizes, or correspondence on SOMI letterhead for the sponsoring organization/individual to use in their fundraising efforts.
- Never supply funding from SOMI to the event.
- Never allow the third party to utilize the SOMI tax ID number.
- Never allow the third party to utilize SOMI's name or logo unless the SOMI State Office licenses (allows) the third party to use the marks.
- Never allow the third party to apply for licenses/permits in the name of SOMI.
- SOMI liability insurance coverage will never be extended to cover a third party event.
- All print and collateral materials used by the third party **must** be approved by the SOMI State Office and comply with SOMI guidelines.
- A Third Party Event application and Memorandum of Agreement must be completed and forwarded to the SOMI State Office prior to approval for the event.

### Background:

Third party events and/or programs are implemented by outside organizations or individuals for the benefit of Special Olympics Michigan, with minimum or no assistance from SOMI.

The sponsoring organization/individual must be respected in the community and one whose reputation will enhance the SOMI's public image. Care should be taken to ensure that the sponsoring organization is not using SOMI's name to offset bad publicity or to improve an otherwise unfavorable public image.

### Criteria To Use When Entering Third Party Event Relationships:

The following criteria will apply to *all* third party events/programs conducted on behalf of SOMI:

1. No event/program, which involves agreement with any organization or individual to raise funds on a commission, bonus or percentage basis will be considered.
2. No event/program will be considered if it involves the sale of tickets, products, or services by use of the telephone.

3. The sponsoring organization is responsible for all sales, marketing and promotion of the event.
4. Hazardous events will not be considered.
5. If only a portion of the proceeds will go directly to SOMI, the sponsoring organization must clearly disclose to purchasers, participants, etc., the approximate amount of dollars and/or percent of the proceeds that will go to SOMI.
6. Publicity and/or promotional materials released to the mass media referencing the SOMI's involvement require advance approval from SOMI.
7. SOMI will not supply any funding to finance a third party event/program and will not be responsible for any debts incurred.
8. Area staff may approve level one events/programs. Level two and three programs require appropriate state and area staff approval.
9. Any use of the SOMI service marks (name and logo) is prohibited unless SOMI licenses the third party to use the mark. All print and collateral materials must be approved by SOMI and comply with existing guidelines regarding the use of the SOMI service mark.
10. Use of SOMI's tax identification number by the third party organization is never allowed.
11. All checks from participants of third party events and programs must be made out to the third party organization, not SOMI.

**Level Two and Three events/programs should meet the following additional criteria:**

1. Representatives of both organizations prior to the event/program must sign a letter of agreement outlining the sponsoring organization and SOMI's responsibilities.
2. The sponsoring organization should provide SOMI with a list of targeted corporate sponsors. SOMI reserves the right to exclude solicitation of specific sponsors.

**Level Three events/programs should also meet the following additional criteria:**

1. SOMI must be protected from any type of damage or injury that occurs as a

2. Anytime an area or areas enter into a promotional arrangement that goes beyond the geographic boundaries of that area(s), coordination must take place with the State SOMI Office.
  3. A memorandum of agreement should be signed by both parties and accompanied by a detailed project description, including a timeline, budget, promotional objectives, and a minimum guarantee of monies to be provided to SOMI.
  4. The sponsoring organization should provide SOMI with a summary of results relevant to the event/program.
- result of the third party's product or event. The agreement must be approved by the SOMI Legal Department and signed before the sponsorship or promotion can take place.

# PUBLIC RELATIONS

## Public Relations and Promotion

The updated SOMI branding material and logos can be found on the SOMI website in the Resource Center found under the “Who We Are” tab. If high resolution forms of the logo are needed for printing purposes, please contact Sr. Marketing and Communications Director Aaron Mills at [aaron.mills@somi.org](mailto:aaron.mills@somi.org).

Templates can be found in the Resource Center, The Brand Identity Guidelines include guidelines for stationary (letterhead, business cards, envelopes and PowerPoint presentations) email signatures, banners, backdrops, flags, press folders, newsletters, report covers, informational leaflets, posters, T-shirt design and the dynamic curve. Also, guidelines for standard positioning of the logo and background color dos and don'ts.

The SOMI State Office, area programs, and local programs should use their best efforts to attract spectators to Special Olympics events and generate coverage by local news media in order to increase public awareness of and support for the needs and capabilities of children and adults with intellectual disabilities.

Areas are encouraged to use a brochure or fact sheet describing their sports offerings, and schedule and send out an electronic newsletter on a regular basis utilizing the official SOMI branding materials.

## The Official Logo



The official Special Olympics logo, created in 1985 and revised in 2012, is the trademark of Special Olympics programs around the world. Used consistently, the logo plays an important part in projecting the image of Special Olympics as a strong, united organization composed of programs at the community, county, area, state and national levels worldwide.

It is very important that SOMI and its areas use the logo properly and follow the rules established by Special Olympics, Inc. (SOI).

## Proper Logo Format

SOMI must follow SOI's Brand Identity Guidelines in their use of the logo. The Guide includes rules such as official logo colors (Red (Pantone® 186) and Grey (Pantone® 418)), acceptable use of other colors, size limits, and proper formatting. There are many variations of the logo that can be found on the SOMI website in the Resource Center.

There is only one logo that Special Olympics Michigan will use for local and state purposes. Areas can showcase their local teams and Areas in other ways. As described in the Brand Identity Guidelines, the Program name must be in Ubuntu font and typography guidelines can also be found in the Brand Identity Guidelines. There are now logo options in 1-line, 2-line, centered and web/online formats. They also come in single color, two color or white. There should be free space left around the logo.

For all new logo uniform guidelines and specifics, please refer to the Special Olympics Brand Identity Guidelines found in the Resource Center of the SOMI website under the “Who We Are” dropdown menu.

If areas have questions concerning the use or format of the logo, they should contact the Marketing & Communications department at the state office.

## Required Uses of the Logo

The SOMI logo must be used on all official materials including stationery, business cards, news releases, letterhead, Games programs, flags and banners, athlete number tags, posters, brochures and all informational material distributed to athletes, sponsors or the general public. The standardized branding must be utilized.

## Website

All Areas have Area webpages within the Special Olympics Michigan website and are not permitted to create their own website. This is important for branding consistency. Area events including competitions, fundraisers, meetings, practices, etc. can be added to the website by filling out a simple online form.

Once you fill out and submit the form, it is sent to Special Olympics International (SOI) in Washington D.C. where they look over it and approve it. It usually takes 1-2 days for an event

to show up online. SOMI then adds the event to multiple calendars at once.

All events will show up on these locations:

1. If it is an area event, it will show up on that specific area's page on SOMI.org
2. All submissions will appear on the main calendar of events page on SOMI.org
3. All submissions will appear on the bottom of the home page at SOMI.org
4. All submissions will also appear on the "Worldwide Events Calendar" at [http://www.specialolympics.org/Special\\_Olympics\\_Global\\_Calendar\\_of\\_Events.aspx](http://www.specialolympics.org/Special_Olympics_Global_Calendar_of_Events.aspx)
5. If it is an LETR event including Polar Plunges, it will also be on the LETR civic partner/program page.

### TO SUBMIT AN EVENT:

Go to: [somi.org](http://somi.org). From the "Events" menu, choose "Calendar of Events." Then click where it says "Click here to add an event, competition or fundraiser to the calendar."

Once on the "Register your Event Page" you can begin entering your information. From the drop down menu in the red box, choose "North America", "United States" and "Special Olympics NA Michigan". And if an event is happening for a specific area you will also want to select the "subprogram". For example, if it's a golf outing that's a fundraiser for Area 11, choose Area 11 from the drop down menu.

Fill out the information in the form regarding your event.

If the event is a tournament or competition, please be sure to fill out the event contact info at the bottom of the form as well. In the case of tournaments, you will want this contact person to be the tournament director.

**Non-calendar event content changes will still need to go through Aaron Mills via phone or email.** So if you have any information, content or pictures that you want added or changed on your area page, let Aaron Mills know and we'll get things the way you want them.

If there is anything else you would like added to your Area page, please contact Sr. Marketing and Communications Director Aaron Mills at [aaron.mills@somi.org](mailto:aaron.mills@somi.org).

Pertinent SOMI documents and templates can be found in the "SOMI Resource Center" by clicking on the "Who We Are" tab on the homepage.

Always include our website on any and all printed materials: [www.somi.org](http://www.somi.org).

### Social Media

Areas are encouraged to create and utilize their own Facebook page. This is where event photos can be posted. Always include logos of the social media outlets that you utilize on all collateral to promote your social media usage. Please alert the Marketing and Communication department at the SOMI state office of any new or existing social media sites that you use.

Social media allows Special Olympics Michigan employees and volunteers to speak in real-time, with a genuine voice. Unlike marketing brochures and billboards that are edited and drafted before publication, social media outlets demand unfiltered and immediate responses and are a way to build long-term relationships, rather than to just promote a campaign or event.

### Board Policy on Social Media SOMI Social Media Presence

Special Olympics Michigan is active on the following social media outlets:

- **Facebook:**

[facebook.com/SpecialOlympicsMichigan](https://facebook.com/SpecialOlympicsMichigan)

Facebook is a powerful social network that combines newsfeeds from your friends and what they "like" across the internet. It can help you stay in touch with supporters, network with other organizations, gain advocates for the cause, drive fans to events, boost the visibility of your local website and share photos or videos.

- **Twitter:** @SpOlympicsMI or [twitter.com/SpOlympicsMI](https://twitter.com/SpOlympicsMI)

Twitter is a microblogging service that allows you to share what is going on right now in 140 characters or less. Twitter can help you connect with athletes and supporters, see what people are saying about your program, share important content via photos, videos, or web links, and let everyone know about your next big competition or event.

- **YouTube:** [youtube.com/SOMichigan](https://youtube.com/SOMichigan)  
YouTube is a video-sharing website on which users can upload, share and view videos.
- **Flickr:** [flickr.com/specialolympicsmichigan](https://flickr.com/specialolympicsmichigan)  
Flickr is a picture-sharing website and app in which users can upload, share and view pictures.
- **Instagram:** [SpOlympicsMI](https://SpOlympicsMI)  
Instagram is a picture and video-sharing app available on iOS and Android devices in which users can upload, share and view pictures and videos.
- **LinkedIn:** Special Olympics Michigan  
Stay connected with Special Olympics Michigan on LinkedIn.
- **Snapchat:** [@SpOlympicsMI](https://@SpOlympicsMI)  
Snapchat is a picture and video-sharing app available on iOS and Android devices in which users can upload, share and view pictures and videos.

### **Social Media Standards and Etiquette**

Any Special Olympics Michigan employee or volunteer engaging in social media dialogue as an official representative of the organization is required to meet the following standards:

- **Be Responsible**  
Remember that you are speaking directly on behalf of Special Olympics Michigan.
- **Be Accountable**  
Don't behave differently online than you would in any other public setting. Give a timely response and monitor your conversation.
- **Consider Your Audience**  
Our fans and followers are parents, athletes, coaches, teachers, volunteers, area directors, donors, sponsors/partners and staff. Consider what you are publishing and make sure it caters to the needs of these individuals without alienating anyone. For example: If posting from or about an event, consider what each one of these groups following from home or on their phone from the event would want to know.
- **Bring Value**  
Consider posting frequency: find the balance between keeping the community updated and turning them off with too

many posts. When deciding whether to post information, decide how much value this will bring to others. Consider the journalistic five W's and H (Who, What, When, Where, Why, How). How does this impact the people you are communicating with and why do they care?

- **Pick Your Battles and Accept Your Mistakes**

Don't pick fights. Be the first to correct your own mistakes. If a Facebook fan says something in poor taste, respond to them politely and honestly and try to answer the question or correct the facts. If you don't have all the facts, do not make them up. Check with a SOMI staff member who has knowledge about the subject before providing an answer or ask this staff member to follow up directly.

- **Be Respectful**

Always take a moment to think of what you're saying and how it could be interpreted by different parties. Consider how your words reflect the organization's mission and make sure you are being a good representative of SOMI.

- **Protect Confidential and Copyrighted Information**

The online community has the power to speak out and have their voices heard. Businesses and non-profit organizations must respond honestly, openly and transparently. However, this doesn't mean blaring out private information before it becomes public. If it's questionable, keep it quiet.

Refer to SOMI's Social Media Policy for area social media account requirements, how to handle media and legal inquiries, and discipline and consequences for non-compliance. When in doubt, consult the Sr. Marketing & Communications Directors.

Social media is a natural way to further Special Olympics Michigan's mission and we want to work together to do so.

## **Purpose**

With the rise of new media and next generation communications tools, the way in which Special Olympics Michigan (SOMI) employees and volunteers can communicate internally and externally continues to evolve. While this creates new opportunities for communication and collaboration, it also creates new responsibilities for SOMI employees and volunteers.

## **Scope**

As with other technology, social media has proper and improper uses when used by people employed by or representing Special Olympics Michigan. This policy is designed to help you understand what is required of you when you declare an affiliation with Special Olympics Michigan. For a complete list of SOMI's social media presence as well as guidelines for social media standards and etiquette, see SOMI's Social Media Guidelines.

## **Requirements for Area Social Media Accounts**

SOMI encourages all Areas to create a Facebook group to easily share information with minimal up-keep (visit [facebook.com/groups](http://facebook.com/groups) for details). To stay consistent with new logo guidelines, you must title your Facebook group with your Area name.

All Areas with Facebook pages/groups are required to have Aaron Mills, Sr. Marketing and Communications Director and the Information Systems Manager as an administrator. Having SOMI employees as administrators provides a.) a means of technical support, b.) support in dealing with potential media and legal inquiries (see next section) and c.) ensures continuity for the Facebook group in the event of other administrators leaving Special Olympics Michigan.

Upon completion of an employee or volunteer's time with SOMI, administrator privileges for Area and/or State Facebook groups will be relinquished. Failure to comply will result in a cease and desist letter giving the option to relinquish administrative rights or face further possible legal action.

## **Media and Legal Inquiries**

Blog postings and other social media discussion forums may generate inquiry about Special Olympics Michigan news and information.

If a member of the media or an independent blogger requests information about a state-run event, press release, marketing materials, or corporate strategy, please contact Aaron Mills.

If an external blog, news site, or other media outlet requests an interview with you regarding an area-run event and you need help with this request, please contact Aaron Mills at [aaron.mills@somi.org](mailto:aaron.mills@somi.org)

## **Discipline and Consequences of Non-Compliance**

If you fail to comply with this policy, you will be subject to discipline, up to and including termination of employment from Special Olympics. In addition, depending on the nature of the policy violation or the online channel content, you may also be subject to civil and/or criminal penalties.

Because you are legally responsible for your postings, you may be subject to liability if your posts are found to be defamatory, harassing, or in violation of any other applicable law. You may also be liable if you make postings which include confidential or copyrighted information (music, videos, text, etc.) belonging to third-parties. All of the above mentioned postings are prohibited under this policy.

Adopted November 2, 2013

## **Statewide Public Relations Guidelines and Expectations**

Special Olympics Michigan will conduct communications activities, which improve the flow of communication to promote the Special Olympics program to potential athletes, volunteers, and donors, and to create public awareness. Electronic newsletters, press releases, website, Facebook, meetings and postings on community calendars are examples of area/region communications activities. The following are some guidelines and expectations to follow when conducting communications activities in your community:

## Media Outreach

- The Marketing and Communications Department has press release templates and other materials that can be helpful in promoting your program or event. Contact Aaron Mills for assistance or visit the "SOMI Resource Center" by clicking on the "Who We Are" tab on the homepage.

## Collateral Materials

Branding Materials must be used.

- All printed collateral materials to be distributed by SOMI must be approved by Erin Dougherty as far in advance as possible (3-4 weeks preferred). This includes posters, programs, brochures, banners, T-shirts, fliers, etc. The Special Olympics Michigan logo should be included on any official materials distributed by SOMI.
- All printed materials must be on branding materials.
- Print jobs must be coordinated with Aaron Mills. Any paid services must be approved. Area Directors/Area Management Teams must plan this into their timeline for getting materials printed for events and promotions.
- The SOMI web address, [www.SOMI.org](http://www.SOMI.org) should be on all collateral materials.

## Public Relations Materials

The following public relations materials are available from the state office:

## Information Sheets

- Special Olympics Michigan fact sheet
- Area fact sheet
- Young Athletes™ fact sheet
- Healthy Athletes® fact sheet
- Unified Champion Schools® fact sheet

## Publications

- eSpirit (electronic) Newsletter
- Posters
- Banners
- Digital Promotional Videos
- Display Boards
- Fact Sheets
- [Family Handbook](#)
- School Resource guide
- Young Athletes Activity & Resource Guide

## MARKETING & COMMUNICATIONS RULES

1. Branding materials must be used.
2. The SOMI website and social media icons should be on all collateral.
3. Sr. Marketing & Communications Director must be contacted regarding media needs. Email address: [aaron.mills@som.org](mailto:aaron.mills@som.org)
4. All printed materials need to be approved by Marketing & Communications Manager Erin Dougherty [dough1ek@cmich.edu](mailto:dough1ek@cmich.edu) or (989) 774-6278. The only exception is if a flyer (or such) is used year after year and only the date changes. If this is the case, the flyer must follow the branding rules and only needs to be approved once.
5. All logo usage must be approved by SOMI.
6. If you are using a branding template for a newsletter (example), you do not have to seek approval.
7. If you want help with any PR materials contact the Marketing & Communications Department.

**Note:** Local media contacts or information should be run by Area Directors before it is sent.

## COMPUTER RULES

1. When emailing regarding Special Olympics Michigan, be sure to list Special Olympics in the subject box so people open it and do not discard the email without opening it.

