

SOKS General Fundraising Policies

DONOR PRIVACY POLICY

Special Olympics Kansas endorses this policy.

The Donor Bill of Rights.

Philanthropy is based on a voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life.

To ensure that philanthropy merits the respect and trust of the general public and that donors and prospective donors can have full confidence in Special Olympics Kansas (SOKS), we declare that all donors have these rights:

1. To be informed of Special Olympics Kansas mission, of the way SOKS intends to use the donated resources, and of our capacity to use donations effectively for their intended purpose(s).
2. To be informed of the identity of those serving on the SOKS Board of Directors and to expect the Board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to SOKS's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
6. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing SOKS to the donor will be professional in nature.
8. To be informed of whether those seeking donations are volunteers, employees or hired solicitors.
9. To have the knowledge that their names and information are not shared outside SOKS, without their permission.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Special Olympics Kansas also subscribes to the Privacy Policy as it relates to the protection of our donors' personal information.

Fundraising Policy – Local Programs

Special Olympics Kansas will conduct state fundraisers under the policy to not engage in the direct sharing of revenue. The exception to this policy may be the projects which require Local Programs to solicit entry fees (ie. polar plunge, a run, golf tournament, etc.) or be heavily involved in planning the logistics of the event. To determine a Local Programs' eligibility for an exemption, it must be approved in advance of the event by the SOKS President/CEO. NOTE: SOKS will work with Local Programs to create fundraising opportunities associated with these events..

Fundraising Policy

1. Only registered Local Programs (identifying in their Application for Local Registration that they are involved in fundraising activities) may receive contributions by soliciting funds in the name of SOKS.

NOTE: The Local Registration process is handled through Headquarters.

Teams not registered or identified as involved in fundraising activities in their Application for Local Registration may not receive or solicit funds in the name of Special Olympics.

2. Locals planning to hold a fundraiser or submit a grant application requesting funds must submit a Fundraising Registration Form (found in Fundraising section) to the Headquarters Office **at least 60 days in advance of the event** (forms are available from the Headquarters Office) (see Fundraising Registration Form” – Fundraising Section).

3. The rules governing commercial messages by sponsors as well as the rules governing use of the Special Olympics logo must be followed. Consult with Headquarters if you have further questions.

4. The largest threat to long-term success in raising money for charitable causes is the potential for misuse of funds raised in the name of the organization. Many times the perception of loose controls or elaborate accommodations is as dangerous as the actual misuse itself. Therefore, the Board of Directors of SOKS has adopted the following policy to apply to all funds which are raised in the name of SOKS.

All Local Programs shall be responsible for being aware of and complying with the SOKS operating policies regarding:

Fundraising
Checking Accounts
Investments
Revenue Reporting

Compliance with Financial Laws & Regulations
Savings Accounts
Receipting of Contributions
Reporting of Expenditures

Games/Event Sponsorship Policy

When a corporation or other organization provides financial support for a Special Olympics competition, that corporation or organization may describe itself, and/or may be listed in signage, publicity and promotional materials, only as a “sponsor” of the Special Olympics event. To protect the ownership and integrity of the Special Olympics name and proprietary symbols, sponsors may never include their corporate, organizational or product names in the title or name of the event itself.

For example, if “Company” is the sponsor of a basketball tournament, the event shall **not** be named or described as the “Company’s Special Olympics Basketball Tournament.” Programs are encouraged to contact their Area Director if they have questions about the appropriate billing and recognition to be given to the event sponsors.

If a sponsor conducts its own event to benefit a Program (i.e., not an event that is held and conducted by a Program), the sponsor’s events shall be identified as such: “Company Fun Run – to Benefit Special Olympics.” Programs are responsible for reviewing and approving, in advance, all advertisements or promotions for such events that will refer to the name “Special Olympics” in order to ensure that they comply with this policy (see Fundraising Section for explanation of “Donor” vs. “Sponsor”).

LOCAL PROGRAM REVENUE SHARING POLICY

Special Olympics Kansas from time to time conducts state fundraising efforts throughout the state which maybe designed to involve Local Program assistance. When this option becomes available, Local Programs will be notified. Should a Local Program wish to assist with the SOKS fundraiser and receive a percentage of the funds for their efforts, the following process must be followed in all cases.

1. A Local Program must identify their willingness to assist the fundraiser and request a portion of the funds be designated to their Local Program by September 1 of each year.
2. This request must be submitted to Special Olympics Kansas annually in order for the Local Program to be considered.
3. Upon the approval of their involvement in the fundraiser and receipt of revenue, the Local Program will be asked to sign a Memorandum of Understanding with Special Olympics Kansas.

In order for the fundraiser to be eligible to share funds with the approved/involved Local Program(s) must agree to:

- Local Program members must serve on the Planning Committee for the fundraiser;
- Local Program must provide volunteers to assist with event set-up and tear-down;
- Provide volunteers to assist in conducting the event; and
- Local Program must recruit event participants.

Once the Local Program has signed the Memorandum of Understanding and receives funds from the event:

- Maximum funds from the event for Local Programs is 10% of the net revenue to be divided in equal parts to the approved participating Local Programs;
- In any year in which the gross revenue for the event is less than the previous year, the share pool is restricted to 5% of the net;
- Local Program receives funds as a credit to be utilized to cover State Event Registration Fees and/or an identified Acceptable Program Expense; and
- The funds must be utilized in a 24 month period following the fundraiser and will not carry over to the following year if the funds are not utilized.

Tobacco Products and Alcoholic Beverages Policy

Tobacco Products

No Special Olympics Program will allow the manufacturer or distributor of a tobacco product to publicly or visibly connect the name or trademark of a tobacco product with Special Olympics in any way.

Alcoholic Beverages

No Special Olympics Program will allow the manufacturer or distributor of alcoholic beverages to publicly or visibly connect the name or trademark of an alcoholic beverage with Special Olympics in any way.

Nonalcoholic Beer Products

Nonalcoholic beer products are treated in the same manner as alcohol and beer products. Nonalcoholic beer manufacturers or distributors may not publicly or visibly connect the name or trademark of the beverage with any Special Olympics event, including any fundraising or special event. Additionally, a nonalcoholic beer could not be a support (secondary) sponsor of any Special Olympics fundraising or special event.

Clarifications

The above provisions do not preclude a Program from:

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

Alcoholic Beverage Distributors

Alcohol distributors will be allowed the opportunity to sponsor Special Olympics fundraising and/or special events (not games or competitions) as long as the name of the company does not have a beer or alcohol brand listed in it.

United Way Policy

State and Area Programs may not become members of, participate in or allow any Special Olympics material to be used in United Way campaigns. Local Programs may participate in their local United Way campaigns. However, Special Olympics Programs, on any level, may receive funds from United Way campaigns provided they are designated to Special Olympics by the donor.

KANSAS SPECIAL OLYMPICS, INC.
GIFT ACCEPTANCE POLICY

Introduction

This policy has been formulated to guide persons in gift solicitations for Kansas Special Olympic's integrated capital campaign. It is to be considered the official policy of the campaign, and is to be implemented appropriately throughout the campaign. It is important to recognize the distinction between the valuation of a gift for counting toward the campaign goals, and the value of a gift for tax purposes or for inclusion as assets of Kansas Special Olympics. Standard accounting principles will govern in all matters related to the accounting practices of Kansas Special Olympics.

Acceptance Gifts

Final acceptance of all gifts will rest with the Board of Directors. Questions as to the acceptance of individual gifts should be submitted to the Campaign Chairperson of Kansas Special Olympics for review by the Gift Acceptance Committee.

Documentation and Reporting Gifts

All gift, pledge and deferred gift commitments to the campaign will require formal documentation before being recognized by the Capital Campaign Committee and counted toward the campaign totals. Such documentation may be a signed and dated pledge form, campaign letter of intent, or a letter of confirmation from a campaign official to the donor.

The gift accounting period is from July 1, 1995 to June 30, 1998.

Outright gifts should be reported only when assets are transferred irrevocably to Kansas Special Olympics. Deferred gifts should be reported only when assets are transferred and a gift is consummated in favor of Kansas Special Olympics.

All gifts and pledges properly documented and falling into the categories by these standards shall be reported as follows:

- * a total of outright gifts and pledges;
- * a total of deferred gifts;
- * the grand total of all gifts, outright and deferred.

STEWARDSHIP POLICY

It is the intention of the Kansas Special Olympics Board of Directors and the Capital Campaign Committee to be good stewards of the gifts provided for the benefit of the Kansas Special Olympics, Mission, Kansas. To that end, the Board will give strict attention to its fiduciary responsibility to provide conservative, strong and consistent management of all funds entrusted to it, in accordance with the "prudent person" investment standard.

Acceptance of all gifts by Kansas Special Olympics will be in accordance with the Gift Acceptance Policy. Emphasis shall be placed on preserving the value of each gift; therefore all gifts, with the exception of life insurance and annuity products, shall be converted to cash in an orderly fashion. Informed professionals may be used to assist in the disposal of items requiring specialized knowledge. Pending utilization for the purpose for which given, the net cash proceeds from all gifts, along with gifts of cash, shall, unless otherwise required by the donor, be invested in accordance with Kansas Special Olympic's Investment Policy, having the safeguarding of principal as the primary objective.

All gifts will be utilized only for those purposes identified by the donor and will be recognized as described by the donor of the funds, pursuant to the Donor Recognition Policy.

For investment purposes, the proceeds of gifts may be managed by the same fund manager who manages other funds for Kansas Special Olympics, but all proceeds will be individually distributed to the appropriate sources. The handling of gifts shall be reviewed at least quarterly by Kansas Special Olympics Board of Directors to insure compliance with the purpose designated by the donor.

Kansas Special Olympics shall annually publish a report on fund activities. This report will be distributed to the Board, and be available to donors and other designated persons upon request.