



# Fundraising Guidelines

Guidelines and tips when fundraising on behalf of Special Olympics Australia

*Version 2, September 2018*

## CONTENTS

### 1. FUNDRAISING

- Sponsorship
- Cause Related Marketing
- Donations
- Grants
- Fundraising Events
  - Parties, Working with other parties,  
Involving professional parties
- Raffles
- On-line Raffles/Lotteries
- Appeals
- Sale of Goods
- Bequests
- E-Marketing Campaigns
- National Campaigns
- Restrictions
- Confidentiality
- Participation of Children in Campaigns
- Photography
- Permits
- Fundraising Legislation and Regulations
- Compliance
- SO Supporters

### 2. PUBLIC RELATIONS

- Language and Terms
- PR Program Planning
- Implementing the Program
- SO Branding

### 3. FUNDRAISING PROCEDURES

- Approval process
- Step by step guide

### 4. FUNDRAISING FORMS

- Fundraising planning form
- Fundraising agreement for approval
- Fundraising money count sign off form
- Authority to collect and receive fundraising money volunteer badges
- Fundraising event budgeting template

## Special Olympics Australia

The Binary Centre, Building 1, Level 3, Suite 3.02, 3 Richardson Place, North Ryde NSW 2113

Phone: 1300 225 762

ABN: 28 050 738 728

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS



## 1. FUNDRAISING

At Special Olympics Australia there are ten key ways of raising funds:

1. Sponsorship
2. Cause-Related Marketing
3. Donations
4. Grants
5. Fundraising Events, eg. local bbqs to national gala dinners
6. Raffles
7. Appeals
8. Sale of Goods
9. Bequests
10. E-marketing Campaigns



### SPONSORSHIP

Sponsorship is when a company provides cash or services in return for brand recognition or other services. Accredited States and Clubs are authorised to seek sponsorship in their local community with the assistance of the national office where required.

If an accredited State or accredited Club is seeking sponsorship from a national company or a local branch of a national company, they should first check with the fundraising team at Special Olympics Australia to ensure that there is no conflict of approach. At all times the organisation must act as one when approaching national companies.



### CAUSE-RELATED MARKETING

Cause-related marketing is when the Special Olympics logo appears on a product or products with a percentage of the profit made from sales of those products given to Special Olympics Australia.



### DONATIONS

A donation is a contribution made to Special Olympics without any expectation of a return or benefit. Donations of \$2 and over are tax deductible.

All donations are to be receipted using the Special Olympics Australia receipt books and the treasurer is required to account for these books and to reconcile the receipts with the bank deposits as outlined in the finance manual. See the Club's finance manual for more information and examples about what constitutes a donation.



### GRANTS

Governments, foundations and private trusts have grant programs. Only accredited States and accredited Clubs may apply for grants.

If an accredited State or Club wishes to employ external resources to make applications on their behalf they should first seek the advice and approval of their State Committee. Any grant which involves the employment of staff must be done in consultation with SOA (it being the only legal entity to employ staff).

When applying for a grant it is essential to understand the organisation's capacity to deliver on the grant conditions. In most cases, grants involve reciprocal obligations and GST will apply. Please speak with the national office if you are unsure about GST.

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS



## FUNDRAISING EVENTS

Only accredited States and accredited regions are authorised to hold local fundraising events such as BBQs, chocolate drives or trivia nights.

These events provide opportunities for athletes to get involved in their own fundraising and to raise awareness about Special Olympics in the local community. Funds raised from these events belong to the Club or State that raises the money and must be spent on the activities of that Club or State within a reasonable timeframe.

If an accredited State or Club wish to hold a large fundraising event which involves expenditure of more than \$10k to produce profit (dinners, golf days, concerts, etc) they should consult with SOA's Fundraising Events Manager to ensure that the opportunities for the event are maximised, that it is adequately covered by insurance and that it does not clash with other appeals or events being marketed to a particular audience.

All such events need to be registered with Special Olympics Australia using Fundraising Agreement form included at the end of this document. The form can also be downloaded on our website.



## Financial Obligations

- Expenses incurred in conducting a fundraising event should not exceed 40% of the total proceeds of the event
- There should be sign off forms for all monies raised at the event ie. registration, auctions, raffles\*
- At least two people should be involved in supervising and counting cash and each person should sign the record of receipt/ count sheet/ bank deposit list.
- All volunteers should wear or hold an "authority to fundraise" badge\*\*
- All receipts from an event must be banked intact. Expenses cannot be taken out of the proceeds prior to banking.



## Working With Other Parties (aka Third Party fundraising)

- If an activity is being conducted by anyone other than the Club or State committee, permission in writing must be obtained from the national office before the event can be publicised as being in support of Special Olympics Australia.
- If your Club is partnering with another group (eg. Rotary or another charity) to host an event, there must be a written agreement between you and the other party, outlining the arrangement and how revenue and expenses are to be apportioned. The event can be registered by the relevant Club. Monies raised at the event should be counted by a representative from both charities.

## Involving Professional Parties

- Particular laws apply around engaging professional fundraisers. Some States require a modification of the fundraising license requirements, others require that the Department of Fair Trade be informed of any such arrangements. Clubs should discuss any arrangements to engage paid fundraisers with Special Olympics Australia CEO prior entering into any agreements.

*\*see Appendix 1*

*\*see Appendix 2*

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS

## RAFFLES

Holding a raffle generally requires a permit under our authority to fundraise. It is common for there to be a raffle at Special Olympics events for small items (eg prize pool is less than \$30,000).

Accredited States and Clubs are authorised to run such raffles as part of their license from Special Olympics Australia, in which all States fall under NSW regulations. Some of these are:

- No permit is required in NSW for charitable organisations to run a raffle ('lottery') up to a total prize value of \$30,000. Lotteries with a prize pool in excess of \$30,000 are 'Art Unions' in NSW and are subject to different regulations.
- At least 40% of gross fundraising proceeds must go to the not-for-profit organisation. Expenses, including prizes, not to exceed 60% of gross proceeds.
- Total value of cash prizes is capped at \$30,000.
- Tickets, where prizes include alcohol, may not be sold or bought by anyone under 18 years of age. There are no other restrictions on minors selling raffle tickets in NSW.
- Tickets must be numbered sequentially, and ticket butts must clearly display the ticket number. Where the prize pool exceeds \$10,000 the ticket must also have space on the ticket butt for the purchaser to write their name and address. When advertising the raffle, organisations must make the following information available:
  - the price of the ticket
  - the name of the organisation for whose benefit the raffle is being conducted
  - details of the prizes and their recommended retail value
  - the place, time and date of the draw
  - details of how the prize winners will be notified
  - details of the way in which the results of the draw will be publicised

*\* It is sufficient for this information to be provided on the ticket.*

More information is available from the NSW Office of Liquor, Gaming and Racing at [www.olgr.nsw.gov.au](http://www.olgr.nsw.gov.au) or on (02) 9995 0666 or contact the Special Olympics Australia national office.

## ON-LINE RAFFLES/LOTTERIES

Terms and conditions for on-line website raffles/ lotteries differ depending on the individual campaign. Online campaigns to be offered by Special Olympics Australia will be communicated to States and Clubal committees during the planning stages of each project. Clubs and States are to seek approval from SOA of their intent to conduct an online raffle as this impacts geographic boundaries.

## APPEALS

From time to time athletes traveling to competition may wish to issue an appeal to local businesses. Any letters or appeals issued using the name of Special Olympics must be authorised by a member of the committee of the athlete's accredited State or Club. The funds received are to go directly to the Club or State account for distribution.

## SALE OF GOODS

There are many promotional products that can be sold to raise funds for Special Olympics. Chocolate drives and the sale of pens and caps are some of the items that are regularly promoted. Activities involving the sale of goods do not attract tax deductible status and a separate receipt book must be used for receipting such monies where required.

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS



## BEQUESTS

A bequest is an amount of money or goods donated through a will. Some people also request that there be donations made in lieu of flowers at the funeral. Please contact the national office if donation slips are required.

All correspondence regarding bequests must be immediately forwarded to the Chief Executive Officer for review by our legal advisor.



## E-MARKETING CAMPAIGNS

E-marketing or social media campaigns are fundraising initiatives using the internet to raise funds, capture data and promote Special Olympics.

Special Olympics Australia is the sole provider of e-marketing campaigns for the organisation and funds raised through these campaigns may be distributed at pre-agreed ratios to those who help grow the campaigns.

Future campaigns will be announced on an annual basis so that accredited States and Clubs are aware of national activities when planning their fundraising calendar.



## NATIONAL CAMPAIGNS

To support planning and forecasting for national campaigns all Club and State participation will be required via a registration form outlining details of athletes, volunteers, targets and key coordinators to help support delivering a successful fundraising program.



## FUNDRAISING CONSIDERATIONS RESTRICTIONS

Under Special Olympics International rules the Special Olympics logo may not be publicly or visibly connected or associated with the name or trademark of alcohol or pharmaceutical manufacturers or distributors. However, contributions may be accepted from such companies and recognition is allowable for any other products which may be manufactured or distributed by such companies as long as it is not associated with the alcohol or pharmaceutical product.



## CONFIDENTIALITY

When fundraising for Special Olympics you are put in a position of trust, you should not disclose any information that could cause embarrassment, harm or discredit to the organisation, the athletes and their families, employees or volunteers.

Confidentiality is expected at fundraising events in the case of financial information gained at event, donors names and/or mailing list information. All personal contact information should be stored securely and not shared outside Special Olympics Australia.

Information collected through local and State fundraising programs is governed by the national privacy act policy in your State.



## PRIVACY POLICY

We do our best to respect and protect the privacy of our online visitors. As part of this, we handle any personally identifiable data that is provided in accordance with this privacy policy and the National Privacy Principles (NPPs) contained in the Privacy Act 1988 (Cth).

Our privacy policy as set out on our website at <http://www.specialolympics.com.au/index.php/members/privacy>. This policy is regularly reviewed

### Website technology

For each visitor to our site, our server automatically recognises only the visitor's domain name, not the email address. At this time, no part of our site makes use of "cookies" for user tracking, content customisation, or any other purpose.

For purposes of improving our website content, aggregate information is collected on what pages of the website are visited.

### Links to Third-Party Sites

This website contains hyperlinks to websites operated by parties other than Special Olympics Australia. These hyperlinks are provided for your convenience only. Special Olympics Australia does not control such websites and is not responsible for their content. The inclusion of hyperlinks to other websites does not imply any endorsement of the material on those websites by Special Olympics Australia.

### Restriction of Liability

To the extent permitted by law Special Olympics Australia shall not be liable for any damages or injury caused by, any failure of performance, error, omission, interruption, defect, delay in operation or transmission, computer virus, line failure, or any cause beyond Special Olympics Australia's reasonable control.

### Copyright Information

The copyrights to materials posted on this site are owned by, or licensed to, Special Olympics Australia. All rights reserved. The names and trademarks appearing on this site may not be used in any advertising or publicity without Special Olympics Australia or their owner's prior written permission.

### Information Accuracy

We make every effort to ensure that the information presented on our website is correct and accurate. However, if inaccuracy should occur, we will make every effort to make a correction in a timely manner. To report any website inaccuracies or to request answers to questions about our Internet Policy or about the information on the site, email us at [info@specialolympics.com.au](mailto:info@specialolympics.com.au), or write to us at the address above. Thank you for visiting our site and for your support of our mission to provide year-round sports training and athletic competition for people with intellectual disabilities.

Special Olympics Australia reserves the right to modify this policy from time to time and to apply such modifications to previously collected data.

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS



## PARTICIPATION OF CHILDREN IN A CAMPAIGN

Clubs and States are responsible for getting permission from a parent/carer/guardian for children under the age of 18 to participate in any fundraising campaign.



## PHOTOGRAPHY

If you wish to use photos of athletes volunteers/ staff to promote your fundraising activities you must get approval from the national office. The national office is the repository of the permissions from athletes / volunteers.



## PERMITS

Permits may also be required by councils or shopping centres to conduct fundraising activities and they may require evidence of insurance. Our certificates are on our website at [www.specialolympics.com.au](http://www.specialolympics.com.au). If you're holding an event on private property make sure you have the permission of the owner. Make sure your venue is safe and don't forget about crowd control.

Fundraising Legislation and Regulations

It is important that we manage all fundraising activities in a transparent fashion and abide by all relevant laws and regulations.

Committees should ensure that they are familiar with the relevant fundraising legislation in their State. Details of State legislation is included in your finance manual.

Useful information on complying with legal obligations and best practice can be found at the following websites:

<https://www.fairtrading.nsw.gov.au/charitable-fundraising> <https://www.consumer.vic.gov.au/clubs-and-fundraising> [www.qld.gov.au/law/fair-trading](http://www.qld.gov.au/law/fair-trading)

<https://www.cbs.sa.gov.au/>

<https://www.commerce.wa.gov.au/consumer-protection/charities>

<https://www.cbos.tas.gov.au/topics/clubs-fundraising>





## 2. PUBLIC RELATIONS

Good public relations are a vital part of any charitable organisation. How we are perceived by our members, families, the media, donors and sponsors is critical to our success.

### LANGUAGE AND TERMS

Promotional activities need to portray athletes with intellectual disabilities in a positive manner using appropriate terminology, language and presentation.

Some examples are:

- Use, person with an intellectual disability instead of intellectually disabled
- Use, Special Olympics instead of The Special Olympics

### PR PROGRAM PLANNING

Before starting your PR Program you should consider the following:

- Who do you need to reach and what is it that you need from them,. For example you may want to reach the local schools or sporting organisations and need volunteer support for training.
- What resources are required for your program? Eg people, equipment, funds?
- What contacts do you need to implement the project? You might be able to get these from your committee or volunteers. Then you need to work out what you want them to do in order for you to reach your goal.

### IMPLEMENTING THE PROGRAM

Having planned your program you need to work out the best step to get there, what vehicle will help you reach your goal. Some suggestions are:

- Feature Stories in local newspapers
  - Let your local newspaper and radio station know what you are doing about two weeks before. If you have a celebrity or VIP coming along make sure to let them know. They may even send somebody along to cover the event. Newspapers like photographs but they must be of a high quality.
  - Articles should include our website [www.specialolympics.com.au](http://www.specialolympics.com.au) and SOA toll free number – 1300 225 762. State or Club contacts can also be included.

If the story is about a matter outside your capacity you should contact your State Manager or the National office for assistance.

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS

---

The following people only are authorised to speak on behalf of Special Olympics Australia:

- SOA Board and CEO
- General Managers
- National Staff
- State Committees and Managers are authorised to speak on behalf of the State only



## SO BRANDING

Make sure you use the Special Olympics logo on your flyers and promotional materials. The logo can be downloaded from our website [www.specialolympics.com.au](http://www.specialolympics.com.au) or you can ring the office on 1300 225 762 to request a copy.

When using the Special Olympics logo make sure you follow the logo guidelines as per your licensing agreement. These are also available on our website in the resources area.

Posters to publicise Special Olympics are available from the National Office: 1300 225 762, [info@specialolympics.com.au](mailto:info@specialolympics.com.au)



## 3. FUNDRAISING PROCEDURES

### FUNDRAISING APPROVAL PROCESS

All fundraising activity conducted under Special Olympics Australia, States and Clubs requires communication and approval prior to taking place

Special Olympics national office, Special Olympics State committees and Special Olympics Club committees require notification and must approve all fundraising campaigns in your geographical regions.

#### Step 1.

Please complete the fundraising agreement form (located in this document and or available on the [www.specialolympics.com.au](http://www.specialolympics.com.au) website) include all of the following information on your fundraising agreement form so that all stakeholders are aware of the project and can protect you if there is a clash with another fundraiser.

- Your name
- Type of fundraiser
- Date of fundraiser
- Total profit forecasted to make on this fundraiser
- Your Club or State chair name
- Any other supporting documents, budget, fundraising plan and targets

#### Step 2.

All fundraising agreements must be presented to your Special Olympics chairperson and or nominated chairperson on your Special Olympics committee

Approval of fundraising campaigns falls under 2 categories

#### **\$10,000 or less**

Fundraising campaigns or events that are forecasted to make less than \$10,000 profit can be approved and authorised by your Special Olympics Club or State committee chairperson or nominated chairperson

#### **\$10,000 or more**

Fundraising campaigns or events that are forecasted to make more than \$10,000 profit must be approved and authorised by your Special Olympics Australia head office.

A fundraising campaign of this size would benefit from the support of the national fundraising, marketing, sponsorship, communications and events team.

## SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS

---

Please contact us anytime if you would like support and or would like to discuss what the national and State office team can do to support with:

- Website fundraising pages can be easily built if you want to promote donations or sponsorships online.
- Communications and support in promoting your fundraising campaign may also be available
- Proposals and presentation samples are available
- Posters and flyers about Special Olympics may be available
- Support and advice

Phone: 1300 225 762

Email: [info@specialolympics.com.au](mailto:info@specialolympics.com.au) Or visit our website for all contact info

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS

## THIRD PARTY FUNDRAISING FORM\* - for planning and requesting support

Name of Fundraiser/Event/Proposal: \_\_\_\_\_

Date/Timeframe: \_\_\_\_\_

Fundraiser/Event venue: \_\_\_\_\_

Details of Fundraiser/Event/Proposal: \_\_\_\_\_

Proposed Involvement/representation of Special Olympics \_\_\_\_\_

Special Olympics Resources Requested:

ITEM	YES/NO	QTY
Special Olympics Posters		
Special Olympics brochures		
Assistance with media release		
Images for promotional material		
Other: Please specify.		

How will funds be raised? (eg) ticket sales, auctions) \_\_\_\_\_

Estimate Income: \_\_\_\_\_ Estimated Expenditure: \_\_\_\_\_

Do you have sponsorship for this event and in what form? \_\_\_\_\_

How many people do you think will attend / support your fundraiser? \_\_\_\_\_

Other information: \_\_\_\_\_

Name of Coordinator: \_\_\_\_\_

Contact Address: \_\_\_\_\_

Contact Phone: \_\_\_\_\_ Contact Mobile: \_\_\_\_\_

Contact Fax: \_\_\_\_\_ Contact Email: \_\_\_\_\_

*\*This form to be used by individuals or groups who are not committee members of Special Olympics but external parties wishing to help raise funds. This form is also for athletes or volunteers who wish to fundraise for their club or organisation.*

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS

## SPECIAL OLYMPICS - FUNDRAISING AGREEMENT

I, (Fundraisers name) \_\_\_\_\_ propose to hold my fundraising Event / Activity (Event /Activity name) in accordance with those terms and conditions of Special Olympics Fundraising Guidelines. I have read the above Fundraising Guidelines and I understand my obligations with regards to sending the proceeds raised to the Club, State and or national office for processing within 14 days of the Event / Activity.

Name of fundraising campaign \_\_\_\_\_

Date of fundraising campaign \_\_\_\_\_

The Fundraising campaign is forecasted to make \$\_\_\_\_\_

Less than \$10,000 profit - signed and approved by Club or State Special Olympics Chair and or representative Over \$10,000 profit—signed and approved by National Office

**If you are under the age of 18 please have a parent / guardian / teacher sign this form on your behalf.**

I agree to conduct my Event / Activity in a manner which upholds Special Olympics values and integrity. I agree to notify Special Olympics if the details of my Event / Activity change from those Stated on this Offer Form.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Approved by \_\_\_\_\_

Signed \_\_\_\_\_

Date \_\_\_\_\_

Contact Name in Print::

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Approved by Club or State Committee:

Y/N

# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS

## FUNDRAISING EVENT SIGN OFF FORM

You Should have a sign off form for all area's of all event that you will be collecting money eg. Registration, Raffle, Silent Auction, Live Auction etc.

Fundraising Event Name: \_\_\_\_\_

Fundraising Event Date: \_\_\_\_\_

## RAFFLE Sign Off Form

TOTAL \$ COUNTED: \_\_\_\_\_

Print Name: \_\_\_\_\_  
Volunteer Team Leader

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_  
Special Olympics Australia Representative

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

THANK YOU, PLEASE ENCLOSE IN ENVELOPE  
AS MARKED AND SEAL

**FUNDRAISING AUTHORITY TO FUNDRAISE BADGE TEMPLATE**



**VOLUNTEER  
The Bearer**

---

**Whose signature appears below is authorised to solicit and receive money or any other benefit on behalf of Special Olympics Australia**

**Event:** \_\_\_\_\_

**ID Number:** \_\_\_\_\_

**Bearer's Signature:** \_\_\_\_\_

**Authorised by:** \_\_\_\_\_

**Date/Time Valid:** \_\_\_\_\_



# SOA, FUNDRAISING GUIDELINES FOR STATES, CLUBS & INDIVIDUALS

## FUNDRAISING EVENT BUDGET TEMPLATE

BUDGET FOR (Name of Event)

	Estimated	Actual
Total Income	\$0.00	\$0.00
Total Expenses	\$0.00	\$0.00

### INCOME

	Estimated	Actual
<b>Event Proceeds</b>		
Entry Fees		
Ticket Sales		
Other Income		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

	Estimated	Actual
<b>Sponsorship</b>		
Major Sponsors		
Minor Sponsors		
Other Sponsors		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Extra Sales</b>		
Auction		
Raffle		
Sales of photographs		
Sales of merchandise		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Donations</b>		
Donations		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

### EXPENSES

	Estimated	Actual
<b>Site</b>		
Equipment Hire		
PA, audio visual		
Permits, licences		
Venue hire		
Site staff		
Tables and chairs		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

	Estimated	Actual
<b>Decoration</b>		
Balloons		
Banners and signs		
Flowers		
Lighting		
Table centres		
Advertising		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Refreshments</b>		
Cutlery		
Drinks		
Food		
Linen		
Plates, glasses etc		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Prizes</b>		
Auction Items		
Goodie Bags		
Ribbons, trophies		
Thank you gifts		
Certificates		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>