Fundraising & Sponsorship Manual

Updated April 2014

Special Olympics British Columbia

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1 Introduction

As a non-profit organization, Special Olympics BC relies on the generosity of BC's communities and organizations to keep our programs running year after year. As an SOBC Local, you have a responsibility to raise the funds necessary to run the programs in your community. This manual has been designed as a tool to assist you in developing an effective fundraising plan that will help you meet your goals now and moving forward. Whether you are in the early stages of planning a fundraising event or you just need to refresh your knowledge of tax receipt rules, this manual will be an excellent resource. There are also many fundraising ideas and opportunities presented here that may breathe new life into your current fundraising program.

As you embark on carrying out your fundraising plan for the year, it can be easy to become overwhelmed or you may have more specific questions that are not answered within this manual. The SOBC Provincial Office is here to help! Please contact us with any fundraising related inquiries:

Special Olympics BC
Main: 604-737-3078
Toll free: 1-888-854-2276
Email: info@specialolympics.bc.ca

Or visit our contact page to contact our Fund Development team directly:

http://www.specialolympics.bc.ca/contact

2 Creating a Fundraising Plan

The purpose of the fundraising plan is to clearly spell out the overall fundraising picture of your Local. Creating an effective fundraising plan is essential to fundraising success. A written plan will allow you to focus your efforts, plan out your yearly fundraising calendar, and give you guidance on strategy and tactics. It is a resource to keep you on track even during the busiest times of the year. It will take some time to get all of your ideas and plans on paper, but it will save you time and stress in the long-run. Ideally, you'll write a plan every year, or will write a 2, 3 or 5 year plan and tweak it at the beginning of each year as you develop your budget.

For a fundraising plan worksheet, visit:

> http://www.peoplepoweredmovement.org/site/images/uploads/Fundraising_Planning_Worksheet.pdf

This worksheet is not Special Olympics focused but it will give you an idea of what to think about and how to start laying out your information.

2.1 Key Elements of a Fundraising Plan

Goals

The best starting point for your plan is with the end point in mind: what is your overall fundraising goal? (Even better: what is your overall fundraising goal for this year, and for each of the next four years?). This number should be based on your Local's budget. Create a goal for each of the areas in your budget that you need to fundraise for. How much money will your Local need to raise in order to maintain and grow your programs? How much money will you need to host competitions? Are there any major expenses your Local is anticipating in the coming year(s)?

Funding Opportunities

Next begin brainstorming and identifying fundraising opportunities and sources for each of your fundraising goals. The four most common funding sources in Canada are:

1. Individual Giving
    - Did you know that individual donors give about 80% of all private donations made in Canada? To find these donors you need to look no further than your family, friends, neighbors, and fellow community members. These are the people you invite to your events to really establish a connection to Special Olympics and encourage continued support.

2. Government
    - This means applying for the Community Gaming Grant through the BC Gaming Policy and Enforcement Branch. For more information see the Gaming section starting on page 35.
3. Corporate Giving
    - This means soliciting sponsorship and donations from local businesses.
4. Foundation Grants
    - This means researching and applying for grants that are offered by foundations serving your community. For more information see the Grants section starting on page 24.

Be aware that researching potential funding sources is an ongoing task that requires regular contact with the people in the community, reading the newspapers daily, and regular follow-up with your funders to assure that confidence in your Local is strong and future funding opportunities are known.

The best way to proceed for long term stability is to invest in building and maintaining a stable group of donors who contribute because they support the mission and program of Special Olympics. Experience shows these donors are more loyal and profitable in the long term.

Fundraising Strategies and Tactics

Once you know how much you need to raise and some of the sources you can draw on to raise it, you need to figure out ***how*** you are going to raise the full amount. What is your strategic approach to each of your funding sources? What tactics will you use to raise your goal amount this year? Next year? This is where you will go into detail and start looking at specific ways to capitalize on the opportunities and sources you identified above. Look at the groups you are trying to reach out to and determine specific and effective ways to solicit donations. This is where you begin to look at planning fundraising events and campaigns, identifying the grants your Local is eligible to apply for, and identifying potential corporate sponsors for your events and/or programs.

When it comes to tactics, there is no shortage of ways to raise money, only a limited amount of volunteer resources to implement your ideas. Try to include a good mix of fundraising tactics. Be willing to nix ideas that end up not working and make up the lost revenue elsewhere.

Timeline

Once you've come up with a budget, set your goals, and drawn up a plan that includes a solid group of fundraising tactics, it's time to create a detailed timeline. Think about breaking each of your fundraising tactics down into a series of tasks and set deadlines that will give you plenty of time to complete each task. Look at your entire yearly calendar and slot in deadlines for grants, identify times of year when a special event would work (i.e. avoid months where there are major competitions, etc.), and set deadlines for when to approach sponsors for the events you have throughout the year.

Try to create an accompanying timeline and to-do list for any of the bigger events or projects you have in your calendar and hand these out to your committees to keep everyone on track and accountable.

Don't forget to include the provincial fundraising campaigns in your timeline to ensure your Local is well prepared for those you participate in. There is more information about these campaigns in the Sponsorship section on page 17.

Having a detailed timeline as part of your written plan will force you to think critically through your fundraising decisions, and provide invaluable guidance on your activities as the year progresses.

Get Going!

Now that you have your written plan and your calendar is laid out, you are ready to put your plan into action! Use your fundraising plan to guide your fundraising efforts throughout the year. Now that you have done all this work, be sure to check in on your plan at least monthly to ensure your Local is staying on track.

3 Special Events

Properly staged, events can raise significant dollars for your Local while attracting the attention of potential constituents (volunteers, donors, and sponsors). Remember, events are not always solely about raising money, they are also an excellent way to raise awareness about Special Olympics in your community. Keep this in mind during the planning process.

To manage an effective and successful event, you need to ensure that you:

- Build a strong committee that can assist in planning and coordinating the event.
- Identify and define tasks and responsibilities.
- Assign those defined tasks and responsibilities to appropriate individuals or teams.
- Provide a work plan and an organizational structure.

3.1 Building an Event Committee

To be successful you will need to assign an Event Chairperson and a team of energetic volunteers that are dedicated to the task at hand. Special events are time consuming, detail-oriented ventures that require a lot of effort for the return on your investment. Involving a group of people in planning and organizing a special event enables you to benefit from their diverse skills, contacts and ideas. It also enables a group of people to share the work load.

The Event Committee and the SOBC Local Structure

The structure of an event committee should be based on the particular needs of that event, and should fit into the SOBC Local structure as follows:

- The Event Committee (and sub-committees, depending on the size of the event) reports their progress to the Event Chairperson.
- The Event Chairperson reports progress to the SOBC Local Fundraising Coordinator.
- The SOBC Local Fundraising Coordinator reports progress to the SOBC Local Executive Committee.

Recruiting Committee Members

When building a committee for your event:

- Invite people who are interested, motivated and who have a set of skills and/or contacts that are useful for your particular event.
- Limit the size of the committee. Find a strong, small group as opposed to a large, difficult-to-manage collection of people.
- Develop a written job description for each individual.

3.2 Planning Tips - Managing the People and the Process

A major benefit of working with a committee is the free-flow of ideas that comes from a group. At the same time, too many ideas can also be a detriment to working with a committee. It is important to be open to creative and new ideas and to manage those ideas to suit the best interests of the event.

Brainstorming Session/Planning Meeting

Start planning your event by holding a "brainstorming" session or a planning meeting at least six months out from your anticipated event date. The objectives of this meeting are to:

- ❑ Start thinking about what your event is going to "look" like:
    - o What type of event will you hold?
    - o When and where will you hold your event?
    - o Who can you ask to sponsor your event?
    - o Will you need prizes or auction items? Where will they come from?
    - o Will you offer food and beverages?
- ❑ Determine the purpose of and specific goals for your event, including the dollar amount you hope to raise. Many charitable events have more than one goal; perhaps your main goal is to raise money but you'd also like to gain publicity for your Local. Figuring out the details for your event will depend on knowing what you are trying to achieve.
- ❑ Create a creative and realistic road map to achieving the goals you have set.
- ❑ Generate commitment from the organizers and supporters.

Plan Effective Meetings

The following tips should help you to organize and lead productive event planning meetings:

SET THE STAGE

Time: Make sure that you put aside enough time to do it properly.

Setting: Find a comfortable environment without distractions.

Visual Aids: Have a whiteboard or a flipchart, magic markers and masking tape available.

Agenda: Prepare an agenda and be clear on the results that you and your committee are meeting to achieve.

WHILE PLANNING

Involvement: Keep everyone involved in the planning process. Draw out opinions and make time for quiet participants.

Record:	Write down key points and decisions during the meeting. Be sure to identify actions and the person responsible.
Utilize Plans:	Use the plans you come up with as a guide.
Innovate:	Keep a listing of bright ideas for future activities.
Facilitate:	Use a group member as a facilitator for groups larger than five members.
Check Up:	Test for commitment within your group at each phase.

AFTER PLANNING MEETINGS

Inform:	Write up the meeting summary as soon as possible. Circulate the meeting's notes to everyone who should be 'in on' and 'up on' your event.
Monitor:	Monitor and follow up on specific immediate action steps.

3.3 Developing an Event Plan

All events, be they large-scale events like golf tournaments, or small-scale events like bottle drives, require planning and organization. The following steps may assist you in developing a plan for your next event:

Step 1 – Gather & Analyze the Facts

Establish the minimum requirements for running your event by gathering and analyzing basic facts about running the event. If possible, look to past events of a similar nature to test out preliminary ideas and to gather information about basic requirements.

Ask yourself:

- ❑ What does running this event involve?
- ❑ What is the minimum number of people/supporters we need in order to move forward with the event? Who are the 'experts' out there who can advise us?
- ❑ What are the facilities that we require to hold this event?
- ❑ Given our proposed cost estimates, what are the minimum financial resources we require before moving forward?
- ❑ If a similar program was carried out in the past, what can we learn from it?
- ❑ Who is the target audience for this event? Who is invited?

And perhaps most importantly:

- ❑ **How is this event going to raise money?** Ticket sales? Raffle? Silent auction? Think through all of your revenue sources and what it will take for them to run successfully.

Step 2 – Set a Budget

Every fundraising event plan should contain a complete budget listing all of the expenses that will be required to hold the event. Your budget should include things like facility rental, catering, entertainment, transportation, utilities and anything else that will be required to make the event a success. Your budget should take into account your fundraising goal, ensuring that you raise that amount above and beyond all expenses. Be sure to leave a little extra room in your budget for unforeseen costs.

Do not stray from your budget without prior authorization from the Executive. If a great idea comes up that will significantly enhance your fundraising efforts, ensure that the idea and the new budget is approved.

For help creating a budget, there is an excel budget worksheet on the provincial website:

> http://www.specialolympics.bc.ca/fundraising-resources

Step 3 – Finalize Your Details and Develop a Written Work Plan

Now it's time to finalize your plans to achieve your goals set out in step one. Much like your fundraising plan, written work plans help to ensure that all committee members are on the same page, that tasks are not overlooked and that assigned responsibilities are being accomplished on time.

1. List the tasks and activities to be done to achieve the results.
   - ❑ Make an exhaustive list of what needs to be done.
   - ❑ Distinguish between tasks (the major jobs) and activities (the smaller jobs) that must be done to accomplish the task.
   - ❑ Rework the list to make sure that all aspects are included.
2. Sequence the tasks.
   - ❑ Rewrite tasks in sequence from start to finish.
   - ❑ Note that some tasks cannot be started until others are completed. Others will be done simultaneously.
3. Specify what resources are needed.
   - ❑ List the supplies, people, technology and finances for tasks.
4. Include time frames and checkpoints for the different tasks.
   - ❑ Write in start-up and completion dates for each task.
   - ❑ Build in checkpoints for your progress.
   - ❑ Tie your work plans to the overall event planning and decision-making process.
   - ❑ Note the reports that are necessary, including the format and circulation required.

5. Answer all questions before they can be asked
    - A successful event never has guests looking around asking, “what now?”
    - Do a thorough walkthrough of your event and answer all questions that may come up for your guests.
    - This will help you determine things like how much signage you will need and where it will need to be placed and where to place key volunteers to guide guests in the right direction before they have to ask

It's essential to keep track of all tasks and responsibilities when dealing with a committee to ensure that everyone is getting their job done. Develop a written chart of responsibilities or task list and circulate it to the group.

Step 4 – Enlist the Support of Sponsors

Sponsorship is an area where personal connections are invaluable. Ask the members of your committee if they have any connections to local businesses and if they are comfortable approaching their contacts with your sponsorship package. Whether you have a connection or not, researching the companies you plan to approach and tailoring your sponsorship plan to meet the needs of each company is essential. For each organization, look into the following:

- Current marketing strategies
- Products/brands
- New product information
- What is important to them and what are their objectives

From this you can make connections between an organization’s interests and what your event has to offer.

DEVELOP A SPONSORSHIP PACKAGE

Each of your events may present a different set of benefits and opportunities for your sponsors. For example, sponsoring a hole at a golf tournament will give the sponsor exposure to a small group of influential people, while a sponsor of a car wash or roof sit may hang a corporate banner and reach a larger public audience.

Be sure to tailor your pitch to highlight the unique benefits of your specific event. Every package or proposal should include:

- A personalized letter of introduction to the Special Olympics organization and your event
- A “menu” of opportunities for potential sponsors to choose from with clearly defined benefits for each level of sponsorship

For more about how sponsorship works, please see the Sponsorship section on page 17.

Treat any sponsors who come on board as VIPs. Ensure they are well taken care of and all the benefits you promised to them are fulfilled. Be sure to keep sponsorship benefits consistent to ensure all sponsors and their contributions are honoured and treated fairly.

Step 4 – Recruit a Team

You will need to recruit a strong and committed team of volunteers to assist you in completing the many tasks that are involved in hosting a successful event. Before recruiting volunteers, consider:

- What are the jobs that need to be done?
- How many people are needed to fulfill all jobs?
- What are the necessary skills required to perform these jobs?
- What benefits will we provide for volunteers?
- How and where can we recruit the needed volunteers?

When you've determined the needs that must be fulfilled by volunteers, write job descriptions so that those volunteers know what is expected of them. Be sure to recruit the right amount of volunteers for your event. Too many and you will have people standing around and feeling like they are wasting their time, too few and your volunteers will be stretched too thin and your event will not run smoothly.

Once volunteer requirements are defined and job descriptions are written, you are ready to begin recruiting your team. Since the majority of the volunteers will come straight from your Local, speak to your Volunteer Coordinator about helping to recruit. Be sure to send out job descriptions and a schedule so volunteers are well prepared on event day. If you are having a large or unusual event, the key volunteers may want to have a practice run to make sure that your operation is running smoothly.

Step 5 – Final Preparation

In the final stages of planning your event:

PREPARE A COMPREHENSIVE EVENT SCHEDULE

Co-ordination is easier if your key people have a schedule that integrates all components of the event. Often referred to as an "event script", this document will include the timeline and full details of everything that will occur over the course of your event, including the actual script for any announcements or speeches. Prepare the first draft of the event script and try it out a few days before the event. Some things will need to be added, others deleted. Much of this will seem like the small nitty-gritty of the event. Remember to assign someone to follow-up on last minute changes.

Rewrite the event script with required changes and use it to rehearse the small details of the event. You are sure to have overlooked some things. Revise again and repeat. You'll know you are close to having your final script when the number of changes/additions you need to make to the script are vastly decreased.

The final version of the script will be your guiding plan for the day of the event.

DEVELOP "ESCAPE ROUTES"

Identify potential hazards of the event. If you and your team have been through this type of event before, share your experiences with newer team members.

If this event has challenging elements, develop plans to prevent these challenges from occurring during the event. Anticipate any potential disasters and think through contingency plans.

FINAL CHECKLIST

- ❑ Are all of your systems in place immediately before the event?
- ❑ Do you know the backup systems and protocol should something go wrong?
- ❑ How and when will you check in with your committee and key volunteers?
- ❑ What last minute details are there?
- ❑ Has everyone done their job?
- ❑ Have you answered all of the questions your guests might have? Physically walk through your event one last time to be sure.

PREPARE YOUR TEAM

Set up a place and time to meet with key organizers immediately before their duties for the event begin and at set times during the event. Use these times to check in, to preview the upcoming requirements and to deal with concerns for the next time frame within the event.

3.4 Show Time!

Stay Organized, Stay Calm

On the day of your event, be sure all of your key players have a copy of your day-of checklist and the event schedule and script. Although you have put in months of planning and hard work and have diligently prepared your committee and team of volunteers, accept that some things will not go as planned.

Troubleshooting During the Event

There are two kinds of troubleshooting during the event: handling problems that can be solved alone and resolving problems in consultation with others. When a challenge arises at the event, the first questions to be asked are:

- Do we know a quick and effective way of resolving this problem?
- Who has the authority to deal with this problem?

If you are in a position to resolve the problem:

- Consider several potential solutions before deciding what to do. Try to avoid jumping to the first quick solution you come up with.
- Choose the alternative you think will work best for you. Your comfort with the solution is very important to successful intervention.
- Look at the positive and negative results that may occur from the solution you choose. Are you confident that this action will suitably solve the problem, or will you achieve short-term gain for long-term pain?
- Act on the chosen solution or reconsider your alternatives.

If personality or personnel challenges arise:

- Choose the right time and place to handle the situation. Be discreet if the situation is a delicate one.
- Describe the situation clearly. Avoid innuendoes and address the present situation directly rather than referring to a collection of past situations.
- Specify the solution/changes that could have positive results and present them in a positive manner.
- Stress consequences. Describe how a change in behaviour could lead to favourable consequences.

Wrap Up

REWARD AND RECOGNIZE

Make sure that you take the time to send thank-you notes to everyone who is involved in your event, including donors, volunteers, and sponsors. Keep your donors happy… you're probably going to be asking them for another donation sometime down the road. Ensure that you are able to answer these questions in a positive manner:

- Have we shown our appreciation to all the people and organizations that assisted us?
- Did we provide the benefits we promised?
- Did the volunteers have fun while they worked? Were they kept busy?

POST-EVENT REVIEW AND EVALUATION

Although the event is complete, the event planner's work is not quite done. Review the event and answer the following questions:

- Did we meet our goals?

- Did we fulfill our obligations?
- Have we measured whether we achieved the results we were planning for?
- What were the indicators of success? For us? For the sponsors?
- What were the lessons that we learned? How can we document them for the future?

Write up your evaluation and results in an appropriate way for the Executive. This usually includes a final report with an executive summary, financial forms, conclusions and recommendations. It is helpful to pass along files with background information and documentation to the Event Chairperson.

4 Sponsorship

Sponsorships are more formal arrangements in which the organization receives a marketing benefit in exchange for a transfer of funds from its marketing (as opposed to donations) budget.

4.1 Why Sponsor?

Organizations sponsor events or projects to:

- Build awareness and interest in their company
- Establish themselves as good corporate and community citizens
- Associate themselves with a cause or lifestyle that is meaningful to their employees and customers
- Set themselves apart from their competitors
- Encourage business to business marketing
- Create merchandising opportunities
- Demonstrate their products and services
- Build sales

In order to secure corporate sponsorship for a project or an event your Local is hosting, you need to appeal to one or more of these motivations.

Sponsorship vs. Philanthropy

Sponsorship should not be confused with philanthropy. While foundations give philanthropically, i.e. without any commercial incentive, corporations tend to give out of 'enlightened self-interest'. In other words they are going to expect something in return. Most commonly, it's access to or enhancing their profile in a market they covet.

PLEASE NOTE: The defining element of sponsorship is that sponsors receive benefits (marketing opportunities, etc.) in return for their monetary contribution and therefore sponsorship contributions are NOT eligible for a tax receipt. For more information on tax receipts please see page 43.

4.2 Identifying Potential Sponsors

WHO DO YOU KNOW?

First look to your inner circle – your Executive, your event committee, etc. – for connections to businesses in your community. Personal connections are the best way to get your foot in the door to solicit sponsorship.

LOOK TO YOUR COMMUNITY

Many people automatically think of major corporations when brainstorming potential sponsors because these are the ones we often hear about in the media. Yes, McDonald's and Coca Cola are sponsors of the Olympic Games, but in your community it is more likely the smaller businesses that are going to take an interest in supporting your Local. Look to the local coffee shop to provide coffee and hot chocolate at your car wash, or ask your local sporting store to sponsor your Walk-a-Thon.

It is also a lot easier to identify the key contacts of small businesses. Set up a meeting with the owner directly and you can explain to them in person why they should support your Local. Many local businesses will be happy to support a cause where the money they give stays right in their community.

CASH VS. IN-KIND SPONSORSHIP

There are essentially two types of sponsorship. Cash sponsorship is what it sounds like; an organization gives you money to support your event or program. But another type of sponsorship you may wish to explore is In-kind sponsorship which is a donation of goods or services. For example, if your local coffee shop donates coffee and hot chocolate to your car wash, this is known as in-kind sponsorship. An organization that is hesitant to donate cash might be more open to an in-kind donation so it's good to keep both options open when brainstorming and approaching potential sponsors.

4.3 SOBC Provincial Sponsors

Special Olympics BC has a number of generous provincial sponsors but there are a few guidelines around who you can and cannot approach at the Local level. Before approaching any provincial sponsors, please contact the Provincial Office.

For a full list of provincial sponsors visit:

http://www.specialolympics.bc.ca/who-we-are/sponsors

Campaigns

Three of our partners – Safeway, Staples and JYSK – hold fundraising campaigns in-store each year to raise money and awareness for SOBC. These campaigns require Local support typically in the form of athletes and volunteers being in-store to promote the campaign on a mutually agreed day(s). Below is a general overview of each of these campaigns. The Provincial Office will send out complete details via email prior to the start of each campaign.

SAFEWAY

Regions that participate: All
Time of Year: planning and preparation in February; campaign runs for two weeks in March.

This campaign began in 2009 and used to be shared between Special Olympics and Easter Seals. Since 2014 Special Olympics has had its own campaign running for two weeks in March. Safeway staff asks customers at checkout if they would like to donate $2.00 and they typically receive something in return such as 5 Air Miles or a $5.00 off coupon.

STAPLES

Regions that participate: All
Time of Year: Preparation in April; campaign typically runs in May. Duration of campaign varies from two weeks to the full month.

Staples has been a national sponsor of Special Olympics since 1996, providing both financial and in-kind support to SOBC. Their annual Give a Toonie. Share a Dream. campaign has been running since 2002 and asks customers to 'give a toonie' at the till.

JYSK

Regions that participate: 2, 3, 4, 6 and 8
Time of year: Preparation in August; campaign typically runs throughout the month of September.

JYSK has been a national partner since 2006 and has been running their campaign in support of Special Olympics since 2008. This campaign also has JYSK staff asking customers to donate $1.00 or more upon check-out.

4.4 Creating a Sponsorship Proposal

A well written sponsorship proposal is an essential part of securing sponsorship as it will outline exactly what your event or program is and what you are looking for from potential sponsors. You should tailor each proposal to the sponsor you are approaching but any package you present should include the following:

COVER LETTER

This is your chance to pull at the heart strings of a potential sponsor and capture their attention with a compelling story. Include a brief outline of what Special Olympics is and use a story or anecdote to show why Special Olympics is important in your community.

Never send this letter blindly. Be sure to call and confirm the name and title of the appropriate person to contact. The last thing you want a sponsor to feel is that they are receiving a generic piece of mail. In a sponsor's eyes, generic mail is often junk mail.

OUTLINE YOUR "ASK" AND DEFINE SPONSOR BENEFITS

Be clear in what you are asking for, but give sponsors a number of options to choose from. Each option should have corresponding benefits. For example, if you are seeking sponsorship for a special event it is common to determine sponsorship levels and have increasing benefits as each level (determined by dollar value) increases. It is important to be consistent with your benefits so all sponsors at each level are being treated equally.

When determining the specific rights and benefits you can offer, think about what you can do to help a sponsor reach its objectives. Think about your target audience and ways you can help the sponsor reach that audience.

Sponsorship benefits may include but are certainly not limited to the following:

- Logo recognition on your website or in your newsletter
- Ability to put up a banner at your community event
- Naming rights to your event (i.e. Local Walk-a-Thon presented by Joe's Crab Shack)
- Complimentary tickets to your event
- Media coverage

Keep in mind a sponsor's motivations for supporting your event and be creative in coming up with ways that you can help them achieve their goals while meeting your own. Sponsorship should be a mutual beneficial relationship between your Local and the businesses that support you.

FOLLOW UP

Once you have put together and sent your proposal, be sure to call to follow up and schedule a meeting. In many cases you have to take the initiative to make the first step. This shows commitment and enthusiasm for your event or program.

THE MEETING

Way to go! You got a meeting! But the work is not over yet, you must be prepared:

- Go into the meeting knowing the needs of the potential sponsor's business category. For example, auto dealers typically want to drive traffic to their dealership.
- Discuss the sponsorship opportunity, demonstrate your understanding of the potential sponsor's needs and emphasize the benefits that you can offer.
- Support claims with details.
- During the presentation, watch for signs of interest – such as the prospect asking questions – that might give you an idea of specific opportunities to suggest later in the meeting. Then present or review your initial proposal, which outlines the package and the fee range you are proposing.
- At the end of the meeting review all the key selling points, saving your strongest for last. Spell out your request for sponsorship.
- Throughout the meeting, listen for the prospect's goals and objectives. Ask plenty of questions so you can integrate your program into the company's overall marketing plan.
- Come out of the meeting knowing the individual company's objective. What specifically are they looking to achieve?

REVIEW AND REVISE

- Revise the package based on prospect's needs. Break out the level(s) of sponsorship they were interested in. Present the dollar value with the revised package.
- Obtain verbal agreement on the revised proposal.
- If the potential sponsor is non-committal, ask them to identify their concerns. This gives you an opportunity to address them.
- Send out a letter stating the details of your discussion. Ask for confirmation of the details within two to four weeks.

CONFIRMATION

- Once the prospect conceptually agrees to the program and the dollar value, you are much better off submitting a sponsorship agreement with your own language to reflect the proposal and agreed upon revisions, rather than waiting for the prospect to prepare their own document.
- Negotiate the contract and close the deal.
- As the relationship proceeds, ensure that the sponsor is happy with the way things are progressing. It takes much less time to keep an old sponsor happy than it does to recruit a new one.
- At the conclusion of your event or contract period, sit down with the sponsor and review the project. This would be a great time to discuss further future involvement.

4.5 Sponsorship Proposal Dos & Don'ts

The following points may be useful to consider when writing a sponsorship proposal to a company or group:

Do. . .

START EARLY

Start your sponsorship sales process eight to 12 months before your event. Many companies have a set amount of funding that they may use over the course of the year to support events in their communities. Be sure to give them enough time to delegate these funds to your organization.

RESPECT SPONSOR RELATIONSHIPS

You may approach competitive companies simultaneously – providing that one is not an existing sponsor that you already have a relationship with. In that situation, you need to contact the existing sponsor and give them first right of negotiation. However, if you start negotiations with one company, immediately inform the others that you are off the market. Be sure to be up-front and truthful. You do not want to burn any bridges.

PUT A DEADLINE ON ALL OFFERS

Establish a timeline for receiving a decision. If you don't, your proposal may get lost in the corporate black hole of decision making.

KEEP RECORDS

Maintain files to track responses, including rejections and conditional rejections along with their reasons and explanations. This information is useful when approaching a potential sponsor.

SELL YOUR BENEFITS

Be clear and concise and let your sponsorship package explain on every page what a sponsor can gain from getting involved with your inspiring project.

TAILOR YOUR PROPOSAL TO THE SPONSOR'S BUSINESS CATEGORY

Generic proposals do not work because the benefits that you offer are not equally meaningful to each potential sponsor. For example, the benefit of media coverage may be very attractive to a business-to-consumer retailer, but may be less attractive to a wholesaler.

ADD VALUE

The more value you can build for your sponsor, the greater your chance of succeeding in building a relationship with them. Look at your offer in terms of its overall effect in achieving greater sales for the sponsor. Seek to forge alliances that bring your sponsors critical resources that they could not afford to buy with the funds they have available. What value can they gain from an association with you that they cannot acquire elsewhere?

Don't . . .

INCLUDE YOUR BUDGET

Not only does your budget have little to do with what you deliver, you run the risk of encouraging the sponsor to delete line items, or worse, become involved in planning the details of your program or event.

PLACE A DOLLAR VALUE ON EACH SPONSOR BENEFIT

This will encourage sponsors to debate how you came up with the dollar value for each benefit. If advertising is one of the benefits you offer your sponsor however, you can include the ad's rate card values.

APPEAR AS IF YOU HAVE OVERSPENT TO PRODUCE YOUR PROPOSAL

Presentation and packaging will not sell your sponsorship proposal. The package of resources and benefits you put together for your sponsor will.

INCLUDE A VIDEO

Unless a sponsor requests one, a video will almost surely be ignored. If you have a good video, show it to the sponsor once you have an in-person meeting.

5 Grants

Foundations can be a critical source of financial support in today's challenging non-profit environment. Each foundation is unique in the types of causes they fund and application processes can be lengthy so it is important to do your research beforehand to be sure you meet the criteria of the grant you are applying for.

Each foundation has their own set of criteria and their own application process. As you identify foundations that your Local qualifies to apply to, be sure to work their application deadlines into your yearly fundraising plan so you have plenty of time each year to prepare and submit your application.

5.1 Researching Foundations

COMMUNITY FOUNDATIONS

There are many different types of foundations but those that SOBC Locals are most likely to apply to are community foundations. These foundations often have a broad interest area and generally focus on enhancing the lives of community members. Granting for community foundations is restricted to the community in question. Be sure you are within the boundaries before you apply!

A current list of community foundations in BC can be found at:

http://www.cfc-fcc.ca/about-cfs/find-a-community.cfm?id=2

When researching foundations, you will determine your eligibility by considering each foundation's:

Areas of Interest/Funding Restrictions/Population Groups Served

If a foundation is interested in religion, science or technology, submitting an application would be a waste of your valuable time. Ask what types of applications the foundation approves. Some foundations will make general donations; others will only fund time -limited specific projects. Find out what groups and projects have been funded previously.

Geographic Location

Be sure that you are located within the foundation's granting region. If you are not, do not submit an application. If a foundation covers a wider area, which includes more than one SOBC Local, work with other Locals on one application – a single application will get a better response than multiple applications seemingly from the same organization.

Individuals

A list of the foundation Board of Directors can be very useful for both present and future applications. Often, members of your Local will personally know Directors and may be able to inquire about hints for a successful application. Inviting Directors to a Special Olympics event in your area is also a great way to build a relationship with Board members. The more they know about Special Olympics and its benefits to the community, the more likely you will be successful in your application.

Financial Information

Tax records (T3010) for registered charities are public information, searchable at Canada Revenue Agency:

http://www.cra-arc.gc.ca/chrts-gvng/lstngs/menu-eng.html

In addition to a foundation's financial information you can also find more specific contact information and details about what the foundation funds in this database.

It is useful to know the following about a foundation's assets:

- Total grants
- Grant ranges
- Period of funding
- Other organizations funded

Guidelines

Request a copy of the foundation's guidelines to ensure that you submit the right application. Do your research before you contact the foundation; being knowledgeable when you call shows that you are serious.

Application Procedure

Does the foundation have an application form that must be completed? Some foundations require that you submit a Letter of Inquiry outlining your intentions before they will send you an application form. It can be helpful to contact other organizations that have received funding and ask them about their experiences applying to the foundation.

Application Deadline

Late applications are not processed. Be sure you submit your application on time and with all the required information. If there is no deadline, find out what their fiscal year is, and apply early within that year, as they are more likely to have funds to allocate.

What Are Funders Looking For?

Foundations and other grant giving organizations are looking to fund a project that is well-defined, addresses a clear need and will have the impact stated. One of the first things they will look at is whether your proposed project fits within their interests and guidelines. They will be looking for a clear and realistic statement of your goals, objectives, budget and expected outcomes. They will also consider the history and track record of your organization, so be sure to mention previous successes if they are relevant.

Funders are also looking to be a part of a project that is really going to make a difference in the community. Be sure to tell inspirational and compelling stories that convey the power of Special Olympics and what we do to enrich lives beyond sport. Look to your Local athletes for great stories that will demonstrate to the funder how important and impactful your program is.

5.2 Letter of Inquiry

Some foundations will require that you submit a letter of inquiry before you are allowed to submit a proposal. This helps the Directors to determine if your project falls within the granting mandate for the foundation. It is a great way to save everyone's time if your proposal does not fall within the foundation's guidelines.

In some cases, the foundation will provide an outline of what must be included in the Letter of Inquiry. Be sure to answer all of these questions. In the event that they do not provide any guidelines remember the following:

- Keep it to 1 – 2 pages. This is not your full proposal; it is only an outline.
- Give a brief description of your SOBC Local. (Whom you serve, where you operate, etc.)
- Explain why you are applying to this foundation (i.e. how you fit within their guidelines and their obvious commitment to community enrichment).
- Briefly describe the purpose of the proposal - the specific project or need including a total project cost and the amount you are requesting from the foundation.

5.3 Writing a Grant Proposal

Funding organizations want to see that you have researched their guidelines, and that you recognize how you actually fit within them. As with sponsorship solicitation, do not send a form letter to a number of organizations. Tailor each letter to the specific foundation and address it to their contact person.

IF AN APPLICATION FORM IS PROVIDED

Some foundations provide application forms or set out guidelines of what to submit in your proposal. If guidelines are provided, they expect them to be followed. Guidelines may include page limits, specific questions and required attachments. It is best to type applications if possible; ask if they have their application in electronic format that they can email or you can download. Do not leave out any required information, no matter how small, as incomplete applications may be returned requesting missing information or they may simply be dismissed as incomplete.

IF AN APPLICATION FORM IS NOT PROVIDED

In most cases, you will have to write a proposal without the help of an application form or guidelines. It is very important that before you begin, you use the "Researching Foundations" hints so that your proposal is parallel to the mandate of the foundation you are applying to. The more you understand about the foundation, the better chance you have for success.

If an application form is not provided, you may include the following in your proposal:

Cover Letter

This is an executive summary of your entire proposal. It should be only one page, briefly outlining your organization, how you fit the foundation's mandate and your request, including the amount requested. The reader should get an understanding of your entire proposal from this one page. Be creative and enthusiastic. The goal with a cover letter is to make the reader want to continue reading the full proposal (it is helpful to include a cover letter with application forms as well).

Introduce Your Organization

Briefly explain your mission, who you serve, where you operate, etc. Explain why your organization is the best one to do this project.

Objectives and Method

Briefly explain the "problem" and your solution. For example, if you are looking to raise the funds to start a youth program in your community, include an outline of why your Local needs a youth program, your objectives and goals, and your plan of action/method for achieving your goals. Your objectives and your method are two separate areas; make sure both are clear.

Evaluation

Provide information on how this program will be evaluated. Include follow-up measures if necessary. This is important as it shows you are concerned with providing quality programs. Many foundations require evaluation as a component of a final report.

Future or Additional Funding

If further funds will be required to complete or maintain your project, provide information as to where you will seek this funding. If other funding has already been obtained, list this as well.

Budget

Provide financial information for the proposal. This should include all expenses and revenues (confirmed and potential) of the project. Many foundations do not like to fund an entire project, but prefer to make a contribution to a project that other organizations have already agreed to support. Be sure to include quotes on equipment/facilities if appropriate. Letting a foundation know that you have done your homework is very valuable and shows that you are committed to the proposal. Be specific and do not include headings such as "miscellaneous" or "other." Include a brief paragraph explaining unclear items and the status of requested funds.

Recognition

Some foundations are very interested in recognition for the work that they do. Recognition ensures that their assets will continue to grow as more people hear of the positive work they do. Be sure to include ideas for recognition that may interest the foundation. This may include: recognition in your newsletter, having an Athlete Speaker present to the board or a media release explaining their financial commitment.

Other foundations require no recognition at all but ensure that you promptly thank the appropriate people; send receipts if required and complete any follow-up reports the foundation requires. This is important to relationship building.

What to Include as Attachments

Some foundations will ask for specific information to be attached – make sure you do this! Also, be sure to include the following in every application:

- Your Local Address, telephone, fax and email
- Name and Title of Contact Person
- List of Volunteer Local Executives, their professional affiliations and qualifications. You do not need to provide contact information; they can be contacted through you if necessary.
- Charitable Registration Number - 12947 2411 RR 0001
- Recent financial statements

Other Helpful Hints

- Be professional.
- Have someone outside the organization read your proposal and address any questions they have. Remember, the foundation evaluator does not have background knowledge of your Local.
- Use headings for main areas of proposal, but do not overdo it. These will make it easy for reader to find the information they want.
- Use your discretion – no one wants to be overwhelmed with pages of information.
- Write clearly. Do not use jargon, clichés, slang, etc.
- Write firm, positive statements such as "we will" rather than "we hope to."
- Use appendices to provide further information on specific things mentioned. This keeps the proposal shorter but provides extra info should evaluators want or need it.

6 Fundraising Ideas

Many people are intimidated with the task of raising money to support their Local programs. You don't have to be! We are here to help!

Listed in the following pages are a few ideas that you may wish to adopt. Some may meet your particular needs and others may not. Use these are a starting point. Brainstorm ideas with others in your Local and read the community section of the paper to see what activities have already been successful.

Think through the entire creative process before you begin. If you need any help in these or other areas, be sure to contact the Provincial Office.

Good luck and remember to have fun!

6.1 Online Fundraising

ONLINE DONATIONS

The easier you can make it to donate to your Local the more likely you are to secure individual donors. Today, one of the easiest ways to donate is through a charity's website.

If you have a website, the Provincial Office can provide you with a link to the donation page that is hosted through the SOBC website but the form will automatically set up so that the donation will be designated to your Local. Donations accepted will be sent out monthly.

If you do not have a website, you can still send people to the SOBC website to donate to your Local, you will just have to ask them to specify on the form that they would like the donation targeted to your community.

PLEDGE PAGES

The Provincial Office has invested in a program that allows Locals to create fundraising pages online for any event you are holding that requires getting pledges. If your local is hosting a Walk-a-Thon or any other participatory fundraiser, you can have each participant set up their own page where they can get people to donate directly to them online. Participants will have a link to their pledge page that they can e-mail out or post on their social media pages to reach all of their friends and family. Participants can personalize their pages by putting in a photo, fundraising goal, and some information about themselves and the event.

For more information about how to set up pledge pages for your event, please contact the Provincial Office.

6.2 Service Clubs

Service Clubs are a great place to raise money and awareness for Special Olympics. Members of these Clubs are very supportive of community efforts and are a great addition to any program. Financial support is a common method of support, but members are often willing to help out at events and bring a wealth of expertise and experience with them.

People often question the best way to approach a Service Club. In the majority of cases the Club will ask someone to give a presentation or short speech on what Special Olympics is and does in your area. If you have an individual who has completed the Athlete's Speakers Bureau, this makes an excellent addition to your presentation.

If you have someone within your SOBC program that knows a member of a Service Club, this is a great way to begin. Ask the individual to speak to the member and inquire how you would go about organizing a presentation. If you do not know of any member, send a letter outlining the Local and your interest in letting them know about the work that you do. Be sure to include a phone number where they can reach you.

The actual presentation (if requested) should not be a lengthy production. Service Clubs are very well organized and often have short, very productive, meetings. Be sure to ask how long you have to present and do not go overtime! Include information on the history of Special Olympics, your particular Local, how many sport programs you offer, the number of athletes and volunteers involved and any other relevant information. An athlete speaker adds an enormous amount of value as people can put a face on the program they are going to support. If there is not an athlete available to present, consider showing a short video. Contact the Provincial Office if you require one.

It is usually a good idea to give the Club members a specific idea, event or competition to support. This allows them to focus on serving you in one way and if they require an evaluation report, it is easy to produce. This also gives something tangible that they can claim credit for.

Be sure to follow up on your presentation. Send a thank you note that they can read at the next meeting. Your organization skills and friendly attitude will speak volumes for the program and will help you to secure support.

6.3 Ideas From Around the Province

These ideas are being used by different Locals around the province. If you have had success with an idea that doesn't appear here please let us know and we can add it to the list!

PUB NIGHT

Does your community have a restaurant/pub where everyone heads to watch the game? There are many money generating things you can do at this venue.

Some ideas:

- Work with the pub to organize tickets for a burger and a beer for $10.00 (or whatever price the pub is comfortable with). The dollar amount you decide on should cover the base cost for the food and drink and have a few dollars left over to go to your Local.
- Organize a silent auction.
- Organize a 50/50 draw. Be sure to get a license!
- Have a display of your Local programs. Put up pictures and articles that you may have collected over the years. Be sure to have a volunteer sign-up sheet.
- Ask if you can put a donation jar on the bar so that people can donate to Special Olympics.
- Put information cards on the tables and include information on how to make a donation.
- Just remember this is a casual affair. Keep it simple!

Considerations:

- If the restaurant/pub is contracted to a food company you may not be able to bring in any food and may be charged for set-up. Be sure to ask specifics when speaking with the manager.
- Athletes (over 19) are allowed to attend the event if it is a fundraising event. However most Locals who hold pub nights typically keep it to volunteers, coaches, and parents and their friends.
- Make it a 'drop-by' affair. Try not to make people feel obligated to show up for a particular period of time. This is supposed to be a social event.

WALK-A-THON

Many Locals hold very successful Walk-A-Thons. This is a participant-based fundraiser where participants ask for pledges from their family, friends, neighbors, and community members to complete the walk. Walk-A-Thon distances vary by Local but are typically around 5km in length.

A great new program the Provincial Office has invested in allows you to set up online pledge pages for each participant making soliciting pledges easier than ever. These pages branch off of a main event page created by your Local and are a great tool to use because:

- They look professional and offer a visual representation of your fundraising goals
- Each participant can create a personalized page with their own photo and information

- Participants can cast a wider net by easily sending out the link to their page to family and friends
- Donations are simple and secure
- Tax receipts are immediately generated and sent to the donor by e-mail for donations over $20.00
- Donations are easy to keep track of in real-time

Contact the Provincial Office to set these up for your event!

You may also develop a pledge form for the event for cash donations. Once all pledges have been collected, turn the money and pledge sheet in to your Local Treasurer. The Treasurer can then use the information to file for tax receipts for the cash donations. Please check to make sure all the information is completed. By law, we cannot issue a tax receipt without all the necessary information and until all money is received.

For the most recent tax receipt rules, speak to your Local Treasurer or visit:

http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/menu-eng.html

Below are a few suggestions for organizing a successful event:

Solicit pledges for a short period of time.

Do not run the risk of people being asked numerous times for their support. It saves a lot of time and effort if you are able to collect the money at the time the pledge is made. Those participating should collect pledges from friends, co-workers or neighbours. We do not support door-to-door solicitation.

Be specific about what you are raising money for.

Let the public know what this is going towards, e.g., new uniforms, new equipment, etc.

Notify the media and take pictures on event day.

This is a great time for reporters to get action shots of athletes. Be sure to provide date, time and location in your press release and be available on site to answer questions. If the media is unavailable, have someone take good quality photos and submit them to the media with a story after the event. Contact the Provincial Office for tips on attracting media.

Add additional ways to raise funds.

Be creative and add elements to the event that can easily raise additional funds. Hold a BBQ at the conclusion where participants and supporters can gather and celebrate, hold a raffle, offer incentives to athletes to raise pledges (for example, an entry into a draw for every $20 in pledges raised), solicit sponsors to provide food, water, signs, etc.

Bowl- , Ski- , Swim-A-Thon!

You certainly aren't limited to making this a walking event, though walking is a very inclusive activity that nearly everyone can take part in. Feel free to do a different activity or sport in the same way.

HOCKEY STICK RAFFLE/AUCTION

Every year the Provincial Office has a limited number of autographed Vancouver Canucks hockey sticks that are made available to the Locals for fundraising purposes. An e-mail is typically sent to Locals in the Fall letting them know the process for acquiring a stick and they are then handed out based on a first-come first-served basis. Most Locals use these sticks as a raffle or silent auction prize.

Locals must report on their plans for the stick and also inform the Provincial Office of how much they raised in order to receive another stick the following year.

COOKBOOK

Have all members of your Local submit their favourite recipe. You do not have to create a fancy bound book; you can easily photocopy the pages and put them together nicely.

Some ideas:

- Have athletes create the pictures.
- Create a theme (e.g. Special Dishes in 30 minutes or less; Gold Medal dishes).
- Approach your community print shop for a discounted price on paper. You may want to include their logo in the book.
- Sell the books at Local fairs. Advertise in the community paper.

SPORT TEAM OR TOURNAMENT PARTNERSHIPS

Do you have a Junior Hockey team in your area? Is there a sporting team that people pay to attend their games? Reach out to them to start a partnership with your Local and see if you might be able to benefit from a 50/50 draw once or twice during their season. You could also set up a table at a game and sell raffle tickets. Approach the team and see what great ideas you can come up with together!

These ideas could also be employed during a major tournament for any sport that is happening in your area. Approach tournament organizers to see how you can get your Local involved.

Don't forget! All raffles and 50/50 draws require a license. See the Gaming section for more information.

EMPLOYEE PAYROLL DEDUCTIONS/VOLUNTEER TIME

Do any of your athletes or volunteer work at a large business? Many organizations (e.g. Telus) have a program in place where they will match donations to registered charities. Others have volunteer programs so that their employees are given time should they volunteer a certain number of hours in their community. Talk to athletes, parents and your supporters. Inquire if businesses in your area have existing programs.

6.4 Keeping Track of Cash

Often, this area of a fundraising event is overlooked. No matter the size of your event, you should plan for the collection, counting, double counting and deposit of funds.

When cash is being handled:

- Two guardians of the funds are to be formally identified prior to the event.
- These two people must jointly verify the amount collected.
- Organizers must ensure that all amounts are balanced and signed off by the guardians at the end of the event and before depositing in the bank.
- No one should ever travel with the cash alone. Protect the cash and your volunteers by ensuring there are always two people doing bank deposits.

To stay organized and make the process of handling cash seamless, be sure to bring a lockable cash box, count sheets, coin rollers, and envelopes to your event. If there will be a lot of cash transactions or donations, periodically count cash, note what you have collected on your count sheet, then put the money in an envelope, seal it, sign it and staple the count sheet to the envelope before putting it in a secure place.

Below are some things to consider before and at the event:

- Who is ultimately responsible for the collection of funds?
- Who is responsible for the deposit of funds? Will the bank still be open when you are ready to make the deposit or will it have to wait until the next day?
- Is the cash safe? Is there someone at the cash box at all times? Have you scheduled shifts? Do you have a back-up for breaks?
- Do you have a secure location where you can hold cash if the cash box becomes full?
- Are you keeping track of who is eligible for a tax receipt?

7 Gaming

The BC Gaming Policy and Enforcement Branch provides charitable organizations with access to gaming revenue. For Locals, this access manifests in two ways: by offering Community Gaming Grants, and by providing licenses for charitable gaming, which includes raffles, special occasion casinos, and wheels of fortune. Both the grants and licenses require applications so be sure to work these into your fundraising plan's timeline.

Gaming rules and regulations in British Columbia change all the time. **Be sure to double check policies before you submit an application.** The material presented in this manual may change over the months and years; use this as a guide, not the law!

This section will give you a general overview of gaming policies and procedures but these are constantly changing. For the most detailed and up-to-date information, please contact the Provincial Office or visit the Gaming Policy and Enforcement Branch's website:

http://www.gaming.gov.bc.ca/

7.1 Gaming Account

Each Local is required to have a separate bank account for its gaming revenue. Locals will deposit all proceeds from gaming events into their gaming account. Community Gaming Grants will be electronically deposited into your gaming account. Gaming funds in this account are held in trust for expenditure only on approved purposes.

Also, any cheques received from a Service Club's (e.g. Lions, Royal Canadian Legion, etc.) gaming account must be deposited into your gaming account. It will be clear on the cheque you receive if it is from the service club's gaming account.

APPROVED EXPENDITURES

Gaming funds – those that are raised through a gaming event or donated from the Gaming Branch or a Service Club's gaming account – may only be used within BC to cover eligible costs essential to the delivery of an approved program, including, but not limited to:

- Uniforms
- Equipment necessary for the delivery of programs (e.g. floor hockey sticks, balls)
- Facility rental for the delivery of programs
- Travel to competitions within BC
- Registration fees for competition (e.g. Provincial Games)
- Coaching courses are borderline; only use Gaming funds for costs related to coaching courses if necessary.

You cannot use gaming funds for things like social activities, fundraising costs, or storage rentals.

GAMING ACCOUNT SUMMARY REPORT

Locals must submit a Gaming Account Summary Report annually within 90 days of the fiscal year-end (June 30). This form summarizes all of the activity on your gaming account for the entire year. This report is required to receive a Community Gaming Grant so be sure to submit it annually. For the current report form visit:

http://www.gaming.gov.bc.ca/docs/form-acct-summary-rpt.pdf

INELIGIBLE EXPENDITURES

Grant funds **cannot** be used for the following ineligible costs:

- Costs not related to the direct delivery of approved programs (such as social activities, fundraising costs, storage rentals);
- Travel that is social, recreational or invitational in nature;
- Travel or other costs related to annual general meetings, board meetings, retreats, conferences, inter-league tournaments, etc.;
- Out-of-province or out-of-country aid;
- Out-of-province travel or expenditures, unless approved in writing by the branch.

7.2 Community Gaming Grants

Community gaming grants provide funding to eligible organizations for direct delivery of approved on-going programs to their communities. Any Local that has been in operation for more than one year and has a gaming account is eligible to apply once per year.

Application process

Each year prior to the application period – typically February 1 to May 31 – the SOBC Manager, Finance and Administration sends out an e-mail with the most up-to-date information on how to apply for these grants so be sure to read all of this information thoroughly to ensure you are applying properly. For the current guidelines and application form visit:

http://www.gaming.gov.bc.ca/grants/community-gaming.htm

Below are the general guidelines for your application.

APPLY EARLY

It is in your best interest to get this application done as soon as possible and not wait until the May 31 deadline. There is no way to predict how the funding will be allocated. You will be informed of the decision by August 31.

READ ALL INSTRUCTIONS THOROUGHLY

The Gaming Branch often makes small but important changes to the application process. Be sure to read all instructions each year so as to not miss any details that may delay your funds.

GATHER YOUR DOCUMENTS AND LOCAL INFORMATION

Each year you will be required to submit the following:

- ❑ Constitution and bylaws, which can be obtained from the Provincial Office. You only have to submit these once. If you have submitted them with a past Community Gaming Grant application, do not submit them again.
- ❑ Board of Directors list – a simple Excel spread sheet listing names, positions, and contact information.
- ❑ AGM minutes.
- ❑ Sports organization information – enter both the total number of athletes and the number of athletes aged 18 and under on the space provided.
- ❑ Program budget – showing the prior year actual expenditures, current year projections, and next year's budget. This needs to be done for each program. If you have a surplus, be sure to explain it (see below).
- ❑ Program revenue and expenditures – statement and balance sheet for the previous fiscal year can be obtained from the Provincial Office.
- ❑ A void cheque from your gaming account. A separate chequing account for gaming funds is required to receive a Community Gaming Grant. Please see the application for more details and contact the Provincial Office if you need to open an account.
- ❑ A Gaming Account Summary Report for the previous fiscal year. This is required to be submitted by September 30 every year if you have received funding from the Gaming Policy and Enforcement Branch. Please contact the Provincial Office if you need more information on this.

EXPLAIN YOUR SURPLUS

Should you have a surplus at the end of the fiscal year, you should explain that some or all of this excess was internally restricted for program-related expenditures. For example, if you have $2,000 that you know will be used to send athletes to Provincial Games during the fiscal year and another $2,000 that you know will be spent on uniforms, you should note that $4,000 is internally restricted and why. This is so that the Gaming analysts do not mistakenly think that you have an abundance of excess funds.

If your Local has more than 50% of the prior year's expenditures on hand in unrestricted cash and investments, you may not receive a grant. This is why it is very important to make a note of you have excess funds that are internally restricted for a purpose. You can internally restrict funds for up to three years.

SAVE TIME IF YOU HAVE APPLIED IN THE PAST

As of 2013, there is a shorter version of the grant application that may be used if your Local was successful in receiving a Community Gaming Grant in the previous year and you will be reapplying for the same program(s) and the same amount(s). You still need to submit the applicable budget and financial information but you do not need to send a description of the programs. Contact the Provincial Office if you are interested in this application and he will send you more information.

UNDERSTAND HOW YOU CAN USE GRANT FUNDS

Grant funds must be spent within one year of receipt. The funds may only be used for approved expenditures.

Approved expenditures include:

- Uniforms
- Equipment necessary for the delivery of programs (e.g. floor hockey sticks, balls)
- Facility rental for the delivery of programs
- Travel to competitions within BC
- Registration fees for competition (e.g. Provincial Games)
- Coaching courses are borderline; only use gaming funds for costs related to coaching courses if necessary.

You cannot use gaming funds for things like social activities, fundraising costs, or storage rentals.

7.3 Licensed Gaming

Eligible community organizations may apply to the Gaming Policy and Enforcement Branch for a licence to hold a gaming event as a fundraiser. Applications for licensed gaming are accepted and processed year round. Licence holders are entitled to keep the money they raise from their gaming events, but must use it for approved, eligible purposes.

There are five categories of gaming events that the Gaming Branch administers licenses for: ticket raffles, independent bingos, poker, wheels of fortune, and social occasion casinos. Locals most often need a license for ticket raffles so the guidelines for this category are outlined below. If your Local will need a license under one of the other categories please contact the Provincial Office or see the Gaming Branch website for details.

Ticket Raffles

This category includes regular raffles, 50/50 draws, meat draws, sports pools, sports player drafts, calendar raffles, payroll raffles, rubber duck races, poker rides, cake walks and other such events.

The most common type of ticket raffle is a "regular ticket raffle." For this type of raffle, prizewinners are determined through the drawing of ticket stubs from a draw container. Ticket stubs must be identical in size, weight and shape. Regular raffles include reverse or elimination draws, in which the prizewinners are the last ticket stubs to be drawn from the container, rather than the first.

50/50 draws or single-day raffles are also quite common among Locals. These types of raffles use rolls of double-printed tickets where the buyer gets half and the other half goes into the draw. The ticket buyer has to be present to win.

There are no limits to the number of ticket raffles your Local can hold in a calendar year, but you may need to apply for separate licences for each one. When applying for a ticket raffle license, you are required to set a draw date and have your volunteers sell raffle tickets for the licence period. You are not allowed to sell raffle tickets outside B.C.

7.4 Applying for a Gaming License

Anytime you are holding a raffle or other gaming event you will need a license. The most common and flexible license is the Class B License. Below we have outlined some of the most important things to consider when holding a raffle or gaming event but if you have never held one of these events be sure to visit the Gaming Branch website for a full rundown of all policies and procedures. Once again, these policies and procedures are frequently updated, be sure to visit the links below for the most up-to-date information.

Class B License

- For any gaming event that is projected to generate $20,000 or less in gross revenue
- Application may be submitted online or by mail
- For current, detailed information about this license and how to apply visit:
  http://www.gaming.gov.bc.ca/licences/classB.htm

CLASS B RAFFLE TICKET CONTENT REQUIREMENTS

The Gaming Branch is very specific about what needs to be on the raffle tickets you are selling. This includes your license number so do not print your tickets before you have your license!

Each ticket must have two separate parts, each detachable from the other.
One portion of the ticket is retained by the purchaser of the ticket and the other portion is retained by the ticket seller.

Part 1 of the ticket, to be retained by the person buying the ticket, must include:

- Name and address of the licensee and year-round contact phone number;
- Gaming event license number, to be shown as "BC Gaming Event License #______";
- Location, date and time of all draws, including early bird draws;
- Sequential number of the ticket;
- Number of tickets printed in each price category;
- Price of the ticket;
- Statement of required presence at the draw as a condition of winning, if applicable;
- Statement of participants' responsibility for the cost of prize delivery, if applicable; and
- The words "Winners consent to the release of their names by the licensee."

Part 2 of the ticket, which is retained by the ticket seller and referred to as the ticket stub, must include:

- Place for the name, address and telephone number of the ticket purchaser;
- Gaming event license number, to be shown as "BC Gaming Event License #______"; and
- Sequential number of the ticket.

Where a series of raffles is conducted under a single license, or if you plan to sell discounted groups of tickets (3 for $10, 7 for $20, etc.) tickets for each raffle must be differentiated from the other tickets used in the series (i.e., unique ticket numbers or ticket colours).

Visit the provincial website for a sample of what a Class B ticket might look like:

http://www.specialolympics.bc.ca/fundraising-resources

50/50 DRAWS

Commercially pre-printed and consecutively numbered tickets (those that typically come double-printed on rolls of various colours) are permitted under the following circumstances only:

- Tickets are sold and the draw is conducted on the same day at a single location; and
- Ticket buyers are present to claim their prize. If a ticket holder is not present to claim the prize during the draw, additional ticket stubs must be drawn until the prize can be awarded.
- If a series of draws are conducted on a single day, the tickets sold for each draw must be uniquely identifiable from tickets sold for other draws conducted on the same day.

FOLLOWING YOUR RAFFLE

Deposit your revenue into your gaming account

All proceeds from the ticket raffle must be deposited into the gaming account as soon as possible following receipt of those funds.

Submit a Gaming Event Revenue Report

Your Local is responsible for ensuring that all requirements for its gaming event license are met. This includes keeping complete and accurate records of the raffle and submitting a Gaming Event Revenue Report within 90 days after the expiry of the license.

For the current Gaming Event Revenue Report form visit:

http://www.gaming.gov.bc.ca/licences/docs/form-event-revenue-rpt.pdf

Maintain your records

Your Local must retain all gaming records related to your ticket raffle for a period of five years from the end of the fiscal year in which the net proceeds were disbursed. Gaming records include all financial records, cancelled cheques, bank statements, bank transaction receipts, invoices and sale receipts, records of tickets sold, records of unsold tickets, records of ticket stubs, and all receipts from the disbursement of gaming revenue.

All unsold tickets (except bearer tickets) and ticket stubs must be retained for two years or until the branch has audited that particular raffle, whichever comes first.

Class D License

- For any small-scale gaming event that is projected to generate $5,000 or less in gross revenue.
- The maximum permitted price of tickets is $2 each.
- The maximum permitted value per prize is $500.
- The maximum revenue your Local can generate in a 12-month period under Class D licenses is $10,000.
- Only used for ticket raffles or bingos.
- Application may only be submitted online.
- This license has a number of additional requirements. For detailed information about this license and how to apply visit: http://www.gaming.gov.bc.ca/licences/classD.htm

PRIZE RULES

- Maximum value per prize is $500 (at fair market value).
- Total value of all purchased raffle prizes cannot be more than 50 per cent of the estimated gross revenues (total sales) of the gaming event.

- ❑ Raffle prizes must be secured and available for awarding before applying for a Class D gaming license.
- ❑ Liquor, prohibited or restricted firearms as defined in the Firearms Act (Canada), and live animals cannot be offered as prizes.
- ❑ Prizes and winnings from ticket raffles must be distributed to players at the earliest possible date after the ticket draw.
- ❑ For bingos and single-day raffles (for example, meat draws) the draw must take place and the prize awarded at that day's gaming event.

FOLLOWING YOUR RAFFLE

You will need to follow the same procedures as outlined under the Class B requirements above.

If you are planning a gaming event that could potentially raise more than $20,000 in gross revenue, you will need a different license; please contact the Provincial Office.

8 Tax Receipts

There are a number of rules around issuing tax receipts and they vary greatly depending on the type and terms of the donation. They also change often. For the most up-to-date information, visit:

http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/menu-eng.html

SOME GENERAL RULES

- SOBC issues tax receipts for cash donations, but there is a minimum donation (contact your Local Treasurer or the Provincial Office for the current minimum). While tax receipts can be issued for any amount, this is our policy in order to cover the costs associated with processing the tax receipt (admin fees, postage, etc.). The only exception is to online donations which are eligible for a tax receipt for any amount. Online donors receive their tax receipt automatically by e-mail so there are no associated processing costs.
- SOBC will issue a tax receipt upon receipt of the donation. The donor's name, address, postal code, and amount of donation are required. Please be clear on who is making the donation by indicating the individual's full name or the legal corporate name.
- If the donation is made by cheque, the receipt will be issued to the name on that cheque. For example if Bob Smith, who owns Smith & Smith with his brother makes a donation using a company cheque, the receipt has to go to the company; it cannot be issued to Bob Smith.
- Tax receipts are more advantageous to individuals. Businesses usually do not require a tax receipt and write off the donation in other ways. If a business is unsure of the best way to account for their donation, they should talk to their tax accountant.

8.1 Cash Donations

A very important question you must ask before issuing a receipt is: **did the donor get anything in return for their cash donation?**

If the answer is no – the donor has simply made a cash donation directly to your Local – they are eligible for a tax receipt and you can submit all of their information to your Local Treasurer who will then forward it to the Provincial Office. The tax receipt will be issued and sent to the donor by the Provincial Office.

If the answer is yes, you must deduct the value of the advantage they received and only issue a receipt for the amount your Local is actually receiving. For example, the donor pays $50 to attend a fundraising luncheon where the only consideration received is a meal valued at $20. The total amount received by Local is $50 and the value of the advantage (the meal) is $20. Therefore, the eligible amount of the gift is $30.

If the amount of the advantage exceeds 80% of the fair market value of the gift, please contact the Provincial Office to determine tax receipt eligibility.

This can get very complicated when you have an event that not only offers a meal but also other advantages like entertainment, door prizes, or beverages included in the ticket. For events like these guests typically do not expect a tax receipt but if you for assistance determining if you should issue a tax receipt or not, contact the Provincial Office.

8.2 Non-Cash Donations

These work similarly to cash donations, but in order to issue a tax receipt for a non-cash donation there must be proof of the fair market value of the item(s).

For example, if your Local receives a gift of softball bats with a fair market value of $400 and there is no advantage received by the donor for the gift, the eligible amount of the gift is $400. This value must be confirmed via receipt or invoice in order to receive a tax receipt. Keep the receipt or invoice for your records and submit it with your tax receipt request. Most companies do not require a tax receipt for their donation as there are many other ways for them to write the donation off.

If your Local is receiving a gift of artwork valued at over $1000, the art must have an official appraisal in order to receive a tax receipt. For art valued under $1000, fair market value must be determined and recorded.

When a donation of autographed memorabilia is made, a tax receipt can only be issued for the fair market value of the item before the autograph.

Should the donor be receiving anything in return for their donation, for example if you thank the softball bat donor with a couple of entries into your golf tournament which are worth $100 each, you would need to deduct $200 from the value of the donation ($400) and the remainder ($200) would be eligible for a tax receipt.

8.3 Online Donations

When a donor makes a donation to your Local online whether through the Provincial Office’s website or a pledge page set up for one of your events, their tax receipt will be generated automatically and e-mailed directly to their inbox. Unlike cash donations which must be $20 or more to receive a tax receipt, there is no minimum online donation to receive a tax receipt as there are no processing costs.

This automatic tax receipt function is an excellent reason why online donations should be encouraged by your Local. Not only is it easy, safe, and secure, donors will be happy to receive their tax receipt immediately and it will save your Local time and money on postage as all other tax receipt requests have to be sent to and processed at the Provincial Office and then sent out to the donor which can sometimes take a couple of months depending on when the information is submitted.

If you are using a third party online donation program on your website, you will have to check with your provider to determine if they issue tax receipts or not. It is best to have a link set up on your website that will send donors through the SOBC system to be sure your donors are receiving proper service in this area. Contact the Provincial Office to get your link set up.

8.4 Donations that are Ineligible

There are some types of donations that are ineligible for a tax receipt regardless of if the donor receives something in return or not:

- Sponsorships
  Sponsorships receive a number of advantages and benefits and are considered a business agreement rather than a donation.
- Gift certificates
  The gift card or certificate is considered only to be a promise by the business to give merchandise sometime in the future (that is, when the gift card is actually redeemed). Until then, there has been no gift of property. However, a donation of a gift certificate may be eligible for a tax receipt if a person has purchased a gift certificate from a store that he/she does not own and donates that gift certificate. This is eligible for a tax receipt because there was a transfer of property when the certificate was purchased.
- Gifts of services
  Contributions of services (for example, time, labour, skills) are not transfers of property and therefore are not gifts. However, if the donor is insistent on receiving a tax receipt you can do what is known as a “cheque exchange.” To do this, the business or individual would donate cash to your Local in the amount the service is worth, and your Local would then purchase the service from the donor. The donor is eligible for a tax receipt for the amount of cash they donate.
- Purchases of auction items
  Generally, an item purchased at an auction is not considered a donation as the purchaser receives something of value for their money.