



**our Charitable Activity**

*to assist*

**the Least Among My Brethren**

*“Whatsoever you do to the least among my brethren,  
that you do unto me.” Matt. 25:40*

# 2010 Training Manual

*LAMB Foundation of NC, Inc.*

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*Charlotte, NC 28277*

*An IRS 501(c)(3) non-profit public corporation*

*Federal Tax ID # 56-213- 9696*

*N C Charitable Solicitation License:SL005652*

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*LAMB Foundation of NC, Inc.*  
*Board of Directors*

The current Board of Directors for the LAMB Foundation of NC, Inc., whose term of office is July 1, 2009 through June 30, 2010, are:

|           |   |                    |
|-----------|---|--------------------|
| President | - | David L. Onofrio   |
| Secretary | - | Gregory P. Kent    |
| Treasurer | - | Angelo Gibilaro    |
| Director  | - | David R. Jones     |
| Director  | - | John C. Gouldie    |
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| Director  | - | J. Michael Durbin  |
| Director  | - | Colin Jorsch       |
| Director* | - | Richard White      |

The LAMB Foundation of NC, Inc. holds its annual meeting in May to discuss the disbursement of the funds retained for special donations and the election of officers and board members.

\*and liaison with the Knights of Columbus

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## What Is “LAMB” and the LAMB Foundation of NC?

LAMB, which stands for “Least Among My Brethren” (LAMB), is a foundation which raises funds to assist people with intellectual disabilities in North Carolina. Although the LAMB program was started in 1960, it was formally established as a public, non-profit, fully tax-deductible (501(c)3) foundation in 1999 formally called the LAMB Foundation of NC, Inc. The sole purpose of the foundation is to raise funds and distribute them to accredited organizations and institutions throughout the state which assist those with intellectual disabilities. The K of C Councils in the state are the primary organizing and provide the bulk of the manpower behind the collection of funds for the foundation and thus are responsible for directing the distribution of a majority of the funds they collect.

## Why Do We Have A LAMB PROGRAM?

- ✓ The first principle of our Order is **Charity!**
- ✓ In North Carolina, LAMB is the principal way by which we exemplify Charity.
- ✓ Our efforts provide meaningful support to groups that desperately need our help.

Since its inception the LAMB Foundation has raised more than 20 million dollars for people in North Carolina with intellectual disabilities. All without a single paid employee, thanks to the over 14,000 Knights of Columbus state-wide who along with their family and friends stand long hours giving away Tootsie Rolls and asking for donations. Fully **93%** of the funds raised go directly to charity. The only major operational expenses are for the tootsie rolls, aprons and an outside accountant.

## Where Does The Money Come From?

The money raised for the LAMB Foundation comes from a variety of sources. The predominant method currently by which a council raises funds, which we refer to as the “street campaign” ,is through handing out tootsie rolls. (See *Details For A LAMB Street Campaign on Pg. 5*). This is where Knights, family members and friends don bright yellow aprons and arm themselves with Tootsie Rolls and collection cans. They stand in front of retail establishments (who have given permission) and offer candy to all who pass by and accept donations from those wishing to help out. This straightforward, simple approach has raised millions.

The LAMB Foundation also raises funds which we collectively refer to as “Non-Street Fundraising”, through corporate and individual donations as well as special events and a variety of other programs, some of which will be covered later in that specific section.

By way of some quick examples, one method is through corporate matching gifts programs where Knights and their friends and family participate in their employers’ “Matching Gifts” programs. A “Matching Gifts” program is where a company will match the donations made by their employees to programs like the “LAMB Foundation of North Carolina, Inc.”. All Knights should be encouraged to determine if their employer has such a program and then if they do participate.

Another way is to solicit corporations, companies and sometimes individuals directly for donations and grants primarily through mailings. Large and small corporations support programs like LAMB, but most don’t if they are not asked, so ask them.

One new tool in our toolbox for 2010 has been the establishment of the “Bill Scott LAMB Foundation Endowment”. Details will be forthcoming but briefly the endowment will allow people to make cash and stock donations which will can provide perpetual financial benefits to the foundation.

Finally some approaches growing in popularity among councils are golf tournaments, art auctions, charity dinners, raffles, donation boxes in places of business, Food Lion’s MVP Shop and Share program and many methods. The list is only limited by your council’s imagination.

## **2010 LAMB PROGRAM**

Our collective goal is to make 2010 a landmark year for the LAMB Foundation, by raising our level of fundraising to above a million dollars!

For a number of years we have hovered just shy of this mark. It has also been discussed that our tootsie roll street collections have pretty much peaked and the only way to grow is through “non-street” fundraising. Therefore in order to grow and succeed we need to continue to maximize street fundraising and dramatically improve our non-street fundraising methods.

## Getting Into the Specifics

### Paperwork

All the paperwork and forms needed to run a LAMB program is contained within this manual and downloadable from the state K of C website: [www.kofcnc.org](http://www.kofcnc.org). The timely completion of these forms is extremely important. This paperwork ensures that a LAMB program is well documented and properly controlled and is important to maintaining the program as a tax-deductible foundation.

### Getting Your LAMB Program Started

- ✓ Participate in the State LAMB Workshop. These workshops are a great way to share experiences, compare notes get any questions answered, etc.
- ✓ Review last years' LAMB file, and your council's performance, consult with members of your council who have been involved with LAMB in the past for recommendations and local lessons learned.
- ✓ Develop a calendar of LAMB activities
  - Store Solicitation schedule, events, collecting at your church and at athletic events if possible.
- ✓ Develop or update the council LAMB brochure (see Attachment #5a, 5b and 5c) and or a council information card (Attachment #7). These can be used for a number of purposes. The brochure can be included with corporate donation requests and the card can be handed out while soliciting at stores (if someone asks what LAMB is all about or makes a substantial donation. Also a readily obtainable printed LAMB contribution envelope is available (see Attachment #13). This envelope can be handed out at stores when people do not have any cash on them and included along with any donation request.
- ✓ Provide LAMB updates in every council newsletter, and articles as appropriate for your Church Bulletin. Also send press releases to the local press as well as the diocesan communication outlets.
  - Develop a working relationship with the local agencies that your council supports. Also ask for a list of their needs when you are considering disbursements. *Remind them that we support only materials that will directly benefit their clients.*

- ✓ The Council LAMB Director should provide updates at every council business meeting. Also try to have the director or leader of one of the charities you support make a short presentation at one of your meetings, particularly right before you are looking for store volunteers. It really helps for everyone to see something tangible of where all the effort goes.
- ✓ Council “Kick-Off” Pot Luck Dinner for everyone who is participating in any way
  - Draft the Council’s best speaker to excite those in attendance about the value of LAMB.
  - Invite everyone you hope to involve in this year’s Program, DD, all local clergy, religious sponsors, store managers, agency personnel, local media personalities”.
  - Door greeters and speakers should wear Tootsie Roll aprons. . Everyone gets a Tootsie for dessert.
  - Briefly describe previous successes. Announce this year’s Goal.
- ✓ Update Council file with info so next year will be easier and even more successful. Include press releases and clippings.

## Handling The Money

Money raised in the name of the LAMB Foundation should never be placed in any non-LAMB account. It is LAMB Foundation money, and must be deposited only in the LAMB Foundation account at Wachovia using the numbered deposit slips available from the State LAMB Director.

The “LAMB Foundation of North Carolina, Inc.” is an IRS 501(c)(3) Corporation; Federal Tax ID # 56-2139696. Donations to LAMB enjoy the same tax deductibility as donations to the Red Cross, or to our Church. Donations of \$250 or more should be acknowledged by a special LAMB IRS receipt available from the State LAMB Director (See Attachment 10). The IRS will not accept a cancelled check as proof of donations of \$250 or more; the special IRS receipt is required.

### **\*\* Remember there are two required steps in handling money \*\***

1. Deposit all money (cash and checks) only in a Wachovia branch office using **only the pre-numbered deposit slips** for your council. Slips if needed can be obtained from the State LAMB Director.
2. Donations of \$250 and above require the donor be sent a receipt acknowledging the donation.

## Details for a LAMB Street Campaign

- ✓ Finalize your store solicitation schedule. One thing new this year, the LAMB Foundation now has a Charitable Solicitation License from the State of NC, (CSL#005632), which should help in establishing our credibility if needed. With some of the larger supermarket chains it is sometimes requested that scheduling be done through their corporate office (at a minimum Harris Teeter, Bi-Lo and Food Lion) and they have specific rules of when and how long you can solicit. Many councils however have a long standing relationship with particular stores where scheduling through the store manager is the preferred method. No matter what the route, knowing the manager of every store is extremely important as at the end of the day it is usually up to them. If you run into difficulty or need insurance certificates etc. please contact the State LAMB Director.
  - Present a copy of your LAMB Brochure, and ask permission to solicit
  - Follow up with confirmation letter
  - Award a Certificate of Appreciation for the stores cooperation each year (see Attachment #6)
  
- ✓ Order Candy and Aprons
  - Check supplies, please make sure to order at least 30 days in advance. (Aprons See Attachment 1)
  - For Tootsie Rolls use the special three-part form. (Candy See Attachment 2). Mail the yellow copy to State LAMB Director on the same day you mail the white copy to Tootsie Roll, K/C Program. The pink copy is for your council LAMB file.
  
- ✓ Make sure council LAMB brochures and or information cards are printed up.
  
- ✓ Prepare a Shift Schedule.
  - Phone every council member to work shifts. Older or infirmed members who cannot stand for long periods can use a lawn chair stool, etc.
  - Children, grandchildren, even pets accompanying a Knight always do better.
  - Work Shifts, Shifts, and more Shifts! Provide each and every worker with a brochure and or LAMB cards to respond to questions from shoppers as well as a remittance envelope if possible.

- ✓ Send News releases to Church Bulletin, Pastor, TV, and Radio stations, and local newspaper(s).
  - Try to get on a radio or TV talk show, or get interviewed for a story. Emphasize the local community needs that LAMB will help! Visit the LAMB public website [www.lambnc.org](http://www.lambnc.org) for some examples of press and tv coverage LAMB has received. If coverage is timed just before or during your solicitation dates you will always do better.
  - Provide each at least a brochure.
  - If possible, draft some talking points so that they might consider doing a story as well as a simple announcement.
  - Make certain any material provided is typed – NOT hand written – and is done in good English. For accuracy, avoid providing only verbal notice.
  
- ✓ Deposit all funds within 48-72 hours of receipt using **only special numbered Wachovia deposit slips** which should be obtained from the State LAMB Director if needed. Also, please make sure the bank stamps the deposit slip correctly.

## 2010 - Details for a LAMB Non-Street Corporate Campaign

If pursued, corporate and large personal donations can compose a substantial portion of your overall fund-raising efforts, in some cases up to 40% of your total amount raised, although 10%-20% would be a good first-year target.

*Some suggested steps for a successful corporate campaign:*

- ✓ **Find a person** (not necessarily your LAMB Director) to concentrate on non-street donations and fundraisers. The right person should have some basic computer skills to turn out letters, mailing lists, certificates and more, as well as a passion for LAMB and social skills to deal with company community affairs representatives, executives and others.
  
- ✓ **Establish a LAMB budget** for your Council to cover costs of mailings, paper, certificates, etc. If you are just starting out, a nominal amount should be sufficient. A good rule of thumb is 60 cents for every solicitation sent to cover postage, printing, paper and the like.

- ✓ **The easy ones** – Sam’s Club, Wal-Mart, Costco, Target, Harris Teeter, most large corporations that do business in your area have some level of community based charitable giving. With Sam’s and Wal-Mart the form can be picked up and submitted at the local store. Costco and Target are completed on line. Go to a company’s web site and look under “Community” for complete details.
- ✓ **Identify other possible donors.** This can be done in a number of ways, the easiest of which is the yellow pages. Other sources are your local newspaper, church bulletin, Better Business Bureau Members, Chamber of Commerce or just general knowledge. If there is a corporate business journal that serves your area, they usually publish lists of the largest companies in various fields in your vicinity, as well as addresses and names of key executives.

In addition, poll your membership for possible donors; some might own businesses themselves or know someone who might donate. A number of larger companies will either match an employee’s donation, or donate based on the number of hours the employee contributes to LAMB, e.g. working on store solicitations.

- ✓ **Council brochure** – as mentioned previously having a council brochure or information card is invaluable to include with your donation solicitation mailing. This provides more detailed information on the program and your council specifically. Note that starting this year donations can also be made to LAMB through the LAMB Foundation web site: [www.lambnc.org](http://www.lambnc.org). Donations will be credited to specific councils via the address of the donor.

The brochure or card can also be used for your Tootsie Roll solicitations. Distribute them to the people who give you \$10 or more. In the least, they will know more about the program and sometimes this results in a follow-up donation.

- ✓ **Donation Remittance Envelopes** – are available from Conover Printing (see attachment #13). Cost is \$100 per 1,000, for white envelopes, \$130 for yellow envelopes with red printing. Various levels of contributions and information for credit card entry. On line donations can also be made through the state LAMB website [www.lambnc.org](http://www.lambnc.org). Envelopes can be included with mailings or handed out while doing tootsie rolls to those who can only pay via credit card.

- ✓ **Sending out the mailings** – How you accomplish this will depend on the size of your market. When you start to send letters (see attachment 8 for a sample) to everyone you can think of, you will be surprised where some of your donations come from.

The mailing should include the main solicitation letter, a copy of your Council's LAMB brochure and a small reply envelope (#10 for the mailing, #6¾ for the reply envelope). If you are only sending 10 to 20 or so, manually adding the address, name, etc., is the way to go. If you expect to exceed 20 possible sources, you may wish to consider a simple PC-based database such as Microsoft Access. This database can not only be used to mail merge appropriate name and address information on letters and envelopes but it also tracks other data such as the date the letter was sent, response (if any) and the amount received.

- ✓ **Individual donations** – Put an optional LAMB donation line on your yearly dues invoice. Also, as more people in general find out about what the program is all about (this is where the Council brochure comes in handy), you will find individual donations coming in from unexpected places.
- ✓ **Follow-up and recognition** – If possible, follow up after 7 to 10 business days with a visit or phone call to all corporate donors. All significant donations should receive a certificate of appreciation (see attachment 6) printed on a certificate form and placed in a certificate holder (both readily available at Office Depot, Staples, etc.) or an inexpensive frame.

Also remember any donation of \$250 or more requires a specific receipt be sent to the donor.

You may also want to list your corporate LAMB donors in your newsletter or any printed materials the Council generates where it makes sense.

## **Other Non-Street Fundraising Ideas**

There are a multitude of other ways to raise funds for LAMB – with more coming all the time! Some examples include:

- ✓ **Raffles** – Hold a LAMB raffle at your Council meetings or other Council events. Prizes can include certificates from restaurants, store discounts and autographed sports memorabilia, which can be obtained at not cost. For example, if there is a Panera Bread in your area, a simple letter will get you a bread- or bagel-for-a-year certificate.

- ✓ **Establishing LAMB days with a restaurant or business in your area** – Many restaurants and other businesses are willing to establish “charitable giving days” as a way of building business. For instance, on a certain day, x% of a restaurant’s gross revenue benefits LAMB. This could be a yearly event or ongoing, e.g. the first Monday or Tuesday of the month, with 10% of the restaurant’s gross receipts benefiting LAMB. Encourage your membership to attend on that day and put a notice in your church bulletin if possible. Also, the amount raised is tax deductible by the restaurant or business owner – just make sure the check is made out to the LAMB Foundation of NC.
- ✓ **Golf tournaments, auctions, card parties, chocolate-tasting events (the ladies love it)** – with the proceeds from the event going to LAMB.
- ✓ **Donation boxes** – A single donation box in a high volume, largely cash-based business can generate **\$500** a year, and all you have to do is collect the money every three weeks or so! Locations should be selected (with the owner’s permission of course) where the patron usually pays with cash, for example donut and bagel shops; and fast-food locations. Retail locations that don’t already have tip jars are preferred. Have a Knight “adopt a box” to do the regular collections; it’s generally easy to find someone who frequents the chosen location anyway. As the donation box can hold \$30-\$40, it needs to be locked and it’s a good idea to secure them down (or at least give the appearance that they are secured). Refer to attachment 14a for more information on where to obtain boxes, etc. A high-quality placard for the box can be printed on a PC printer using glossy photographic paper (Wal-Mart). See attachment 14b for an example.
- ✓ **Tootsie Roll sales** – If Tootsie Rolls are left over from your street collections, sell them by the box (\$6-\$7 per box of 50) at your church as Halloween candy. Make sure to publicize through church bulletins, signage and word-of-mouth that the proceeds benefit LAMB.
- ✓ **Shopping mall special events** – Some larger shopping malls feature an “Evening of Giving” event, where the mall remains open after hours only to special ticket holders. The tickets are sold by numerous charities. Any tickets your Council sells, proceeds would benefit LAMB.

## Paperwork

There are currently five reporting forms (see the back of the manual) in use by the Foundation all of which should be sent to the State LAMB Director. With a very limited amount of staffing at the state level it is extremely important that these forms be completed as carefully and accurately as possible and submitted by the required dates.

They are;

**Form 1 – *Report of New Program*** – to be submitted when a new successful fund-raising program is instituted by your council. This form can be submitted at any time during the year, but must be submitted by February 1<sup>st</sup> of the following year.

**Form 2 – *Squire Participation Report*** – this report should be submitted by year End. (December 31)

**Form 3 – *Disbursement Request*** – this is the report detailing the main financial benchmarks for your council and how your council would like their funds distributed. Note an “interim” disbursement can be filed anytime during the year if you would like to award a check prior to year end, presuming of course sufficient deposits have been made to cover the expenditure.

The front page of this report shows the net income available, 85% of which is available for distribution by the council as well as the number of checks being requested and the address they should all be sent to. The GK of your council needs to sign this report. The reverse of the form allows the various checks being requested to be listed.

It is extremely important however that this form is in the hands of the State LAMB Director **no later than February 1<sup>st</sup>. of the following year.** For example for 2010 this form is due February 1<sup>st</sup>, 2011 at the latest. Disbursement requests received after that date cannot be acted upon.

**Form 4- *Income Report*** – this form details the dates street collections were made and what non-street receipts were made and how much was raised. The reverse allows for the listing of individual deposits and expenses (aprons and tootsie rolls). This form is due no later than December 31<sup>st</sup> of the year in question.

**Form 5-** Allows for the communication of the appointment of a new council LAMB Director (or re-appointment) by the Grand Knight of the council.