



UNC Lineberger Comprehensive Cancer Center Guidelines and Policies

UNC Lineberger Comprehensive Cancer Center is grateful to individuals and community organizations who wish to sponsor a fundraising event that benefits cancer research at the Cancer Center. Such events are an extremely important source of support, particularly events that provide unrestricted funds for the Cancer Center's highest priority research initiatives.

Please review the following guidelines and submit a Fundraising Event Application Form to the UNC Lineberger Office of External Affairs at least four (4) weeks prior to the proposed event. Please allow two (2) weeks for a response. Please do not solicit contributions for your event or use the name UNC Lineberger for any purpose until your event is approved.

UNC Lineberger does not advance monies, provide donor lists or solicit sponsorship revenue for fundraising events. Additionally, our ability to provide services for your event is limited by staff size and internal obligations. We state this information in advance so that there are no disappointments or misunderstandings with regard to our ability to support your fundraising event.

Special Events Guidelines

The Medical Foundation of North Carolina, Inc., a 501(c)(3) charitable not-for-profit organization, is the fiscal agent for fundraising activities of UNC Lineberger Comprehensive Cancer Center. UNC Lineberger complies with a wide range of federal and state requirements, as well as general and accepted accounting standards, that dictate our policies and procedures regarding fundraising events and activities to benefit UNC Lineberger. The following guidelines are intended to facilitate your compliance with our practices.

If circumstances warrant, UNC Lineberger may opt out as a beneficiary of the event/promotion at any time with no obligation.

General Guidelines

To secure approval from UNC Lineberger, your event must comply with all federal, state and local laws governing charitable fundraising, gift reporting, and special events in addition to federal and state laws regarding the sale, distribution, and consumption of alcohol.

If another organization will benefit from the event, UNC Lineberger must be notified in advance.

It must be clear on all event materials what portion of the proceeds will benefit UNC Lineberger. In accordance with the Better Business Bureau Wise Giving Alliance's guidelines for charitable promotions, all advertising and promotional materials for your event must clearly disclose to the public the specific amount of money from the consumer's purchase that will be donated to UNC Lineberger Comprehensive Cancer Center (e.g. "\$10 of each ticket purchased," "10% of the sales price of this product," etc.)

Receipting and Tax-Deductibility of Charitable Donations to UNC Lineberger

- Donations should be made by check payable to UNC Lineberger Comprehensive Cancer Center (UNC Lineberger).
- In accordance with tax law, UNC Lineberger will appropriately thank and provide tax documentation for the monetary gifts made directly to UNC Lineberger.
- UNC Lineberger requires the person or organization holding the event to supply the following:
 - The name and address of the donor
 - If a cash contribution, the amount contributed
 - The date of the contribution
 - A description of any goods or services provided in exchange for the contribution
- If any goods and/or services are received in return for charitable donations (i.e. auction purchases, tokens of appreciation, “give-aways,” meals, beverages, etc.), the fair market value of those goods and/or services should be determined and communicated to individuals prior to their making a donation. The value of goods and/or services will be deducted from the total donation amount to determine the tax-deductible portion of the donation.

Promotional Materials

- The UNC Lineberger and UNC logos are registered trademarks and cannot be reproduced without written permission from UNC Lineberger.
- All event materials that include the UNC Lineberger Comprehensive Cancer Center name and/or logo must be reviewed and approved by the Office of External Affairs. Materials include, but are not limited to advertising, press releases, posters, flyers, and t-shirts.
- UNC Lineberger is the beneficiary - NOT the sponsor – of all benefit events. Publicity should list the name of the event followed by “...benefiting the UNC Lineberger Comprehensive Cancer Center.” If the gift is designated to a particular area (ex. a particular research area or program), the area must be listed as the beneficiary - not the Cancer Center’s name in general (i.e. ...benefiting pancreatic cancer research at UNC Lineberger)
- Promotional flyers and/or tickets which invite people to sign up or purchase tickets should state the portion which may be tax-deductible, if the price is beyond the fair market value of the event itself. The Office of External Affairs can assist in proper wording.

Sponsorships

- All corporate sponsors must be pre-approved by UNC Lineberger to ensure there are not conflicts with other key event sponsors or donors currently supporting us in other areas.
- Solicitation of businesses involving the direct or implied use of UNC Lineberger’s name or logo must be approved in advance by the development office. Many businesses already support UNC Lineberger and may not wish to make additional donations.
- UNC Lineberger reserves the right to review sponsorship proposals and packages for appropriate references to UNC Lineberger, as well as language regarding charitable deductions.

Insurance/Permits

- The event organizer must obtain any necessary permits, licenses, or insurance.
- The event sponsors or hosts agree to indemnify and hold harmless the University of North Carolina, UNC Lineberger, and all related entities, from all claims and liabilities that may arise from any acts or omissions of its agents, volunteers, or employees, or from any claim by it or anyone else related to the quality, performance, or failure to perform during the specified time of the event.

Volunteer Assistance

- It is the responsibility of the event sponsors/organizers to recruit, train, and thank any volunteers needed for the event.

Event Expenses

- If event expenses are greater than the money raised by the event, the event organizer is responsible for those expenses.

Time Requirement for Delivery of Charitable Contribution

- Please forward the event proceeds to UNC Lineberger within **30** days of the fundraising event to:

UNC Lineberger Comprehensive Cancer Center
Office of External Affairs, CB 7295
Chapel Hill, NC 27599-7295

What UNC Lineberger Comprehensive Cancer Center can provide:

- Letter on official UNC Lineberger stationery for the sponsoring individual/organization to use in its fundraising and sponsor recruitment efforts. (Letter includes tax-exempt information.)
- Limited existing materials for your event such as brochures.
- Advice for volunteers/event organizers re: fundraising, public relations, marketing, etc.
- Information re: current research at UNC Lineberger (possibly specific to a certain type of cancer, e.g. colon cancer or leukemia) for distribution at the event or for public relations efforts conducted by the sponsoring organization.
- Promote event on UNC Lineberger website and other appropriate media (on a case-by-case basis).
- Review of your press release(s).
- Review promotional materials and, if appropriate, approve the use of and provide a UNC Lineberger logo.
- Letter of thanks (including gift receipt) to event's donors.

What UNC Lineberger Comprehensive Cancer Center may be able to provide (depending on schedules/type of event, etc.)

- A UNC Lineberger representative to set up a booth/table at the event to answer basic questions.
- A UNC Lineberger representative to participate in a check presentation at the event.

For legal and other reasons, UNC Lineberger is not able to perform the following activities or functions for events it does not sponsor directly:

- Public relations support
- Staff support (e.g. event organizing, recruiting of event sponsors/participants)
- Financial support (e.g. upfront money)
- Provide mailing lists or email addresses of donors, physicians, employees, or volunteers
- Provide insurance coverage
- Issue receipts for donations not made directly to UNC Lineberger
- Solicit sponsorship revenue for your fundraising activities
- Distribute promotional materials throughout the University of North Carolina
- Provide auction services or systems