



Community Events toolkit

Your guide to planning third-party events in support of cancer research, treatment and outreach programs at UNC Lineberger Comprehensive Cancer Center and the N.C. Cancer Hospital.



**LINEBERGER COMPREHENSIVE
CANCER CENTER**



Dear Supporter,

To make lifesaving discoveries, offer top-of-the-line clinical care, and provide critical supportive care services for cancer patients, UNC Lineberger Comprehensive Cancer Center and the N.C. Cancer Hospital depend upon financial support from private donors.

A large portion of this private support comes from third-party events (also referred to as community events). These fundraising events are an extremely important source of revenue for the cancer center, particularly those events that provide unrestricted funds.

Community events are critical to our mission and we want to make sure that the volunteers who plan them are set-up to succeed. With success in mind, this toolkit is designed to educate volunteers about the nuances involved with third-party fundraising and in it we cover a multitude of topics, ranging from financial best practices to branding guidelines.

As a charitable, 501(c)(3) tax-exempt organization, 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 benefiting the cancer center. The guidelines in this toolkit are intended to facilitate your compliance with our practices.

We ask you to carefully review our event fundraising guidelines, then sign and return the Event Application. Prior to starting your fundraising efforts, your event must be approved by our staff. Our staff will respond within five (5) business days to let you know if your application is approved.

We hope you find this toolkit helpful when planning your fundraising event. If you have any questions, please contact me at 919.966.5905. On behalf of our researchers, faculty, patients and their families, thank you for volunteering to support UNC Lineberger and the N.C. Cancer Hospital.

With appreciation,

Elizabeth Rubio
Director of Special Events & Community Partnerships

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.

UNC Lineberger External Affairs Office

CALL
919.966.5905

FAX
919.966.8030

MAIL
UNC Lineberger
Attn: Special Events
Campus Box 7295
Chapel Hill, NC 27599

General Guidelines

Anyone can plan and host a community event: it's as simple as following your passion. Host a dinner, organize a tournament, put on a show, or throw a party. When you do it to support the mission of UNC Lineberger and the N.C. Cancer Hospital, you bring us all closer to a world without cancer.

CRITERIA

In general, the primary goals of events supporting UNC Lineberger are the promotion of cancer research, treatment and outreach programs; support the UNC Lineberger mission and values; adhere to our branding identity and standards; have a positive impact on the UNC Lineberger reputation; and generate sufficient revenue to justify the commitment of the UNC Lineberger resources.

APPROVAL

The UNC Lineberger Office of External Affairs must approve all activities between the cancer center and any corporation/organization or donor fundraising on its behalf. Complete the event application form and submit it via fax (919.966.8030) or email elizabeth_rubio@med.unc.edu and a member of our team will contact you within five (5) business days. Approval is granted on a per event basis and UNC Lineberger reserves the right to refuse approval.

RIGHT OF REFUSAL

We reserve the right to refuse:

- *Events that require financing from UNC Lineberger. All events must be financed solely by the event organizer or from event proceeds that should not exceed 25% of the gross profits.*
- *Events that involve a professional fundraiser, telemarketer and/or involves an agreement to raise funds on a commission, bonus or percentage basis or consist of door-to-door solicitation of any kind.*
- *Events that ask for the use of names and/or stories of UNC Lineberger patients for use in promoting or during your event.*
- *Events that require UNC Lineberger endorsement or marketing of a product, service or any hospital participation in the direct sale of a product or service.*
- *Events that compete or conflict with an already established or scheduled event to benefit UNC Lineberger.*
- *Events that fail to comply with any municipal, county, state and/or federal law.*
- *Events that involve the promotion of a political party, candidate, or that appear to endorse any political issues.*

EVENT EXPENSES

If event expenses are greater than the money raised, the organizer is responsible for payment.

TAX STATUS

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.

LEGAL COMPLIANCE

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. Alcohol permits may not be obtained in the name of UNC Lineberger, the N.C. Cancer Hospital, UNC Health Care, the University of North Carolina or any of its affiliates.

LIABILITY

The event sponsors or hosts agree to indemnify and hold harmless the University of North Carolina, UNC Lineberger, the N.C. Cancer Hospital 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.

PERMITS AND INSURANCE

Permits, insurance and other services or permissions for third-party events must be privately obtained and are the responsibility of the organizing party. They may not be obtained in the name of UNC Lineberger, the N.C. Cancer Hospital, UNC Health Care, the University of North Carolina or any of its affiliates.

VOLUNTEER ASSISTANCE

It is the responsibility of the event sponsors/organizers to recruit, train, and thank any volunteers needed for the event. We value their service and if you provide us with their names and mailing addresses, we will be happy to send a letter of appreciation as well.



Event Finance

When planning fundraising events, it is essential to keep detailed accounting records for income, expenses and charitable donations. The rules for non-profit fundraising are complex and we are available to help you through the process.

CHARITABLE DISCLOSURE

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. For example:

*"\$10 of each ticket purchased" or
"10% of the sales price of this product," etc.*

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.

TIME REQUIREMENT FOR DELIVERY OF CHARITABLE CONTRIBUTION

Within **30 days** following the event, please deliver all net proceeds, made payable to UNC Lineberger to:

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

TAX-DEDUCTIBILITY AND RECEIPTING OF DONATIONS

Donations should be made by check payable to UNC Lineberger. In accordance to tax law, UNC Lineberger will thank and provide tax documentation for the monetary gifts made directly to UNC Lineberger.

- Only checks payable to UNC Lineberger, and cash donations (equal to or greater than \$5.00) clearly labeled with the donor's information, and name of event, will be provided with a tax deductible receipt in accordance with IRS and state tax regulations.
- If making a donation on another person's behalf, UNC Lineberger requires the person or organization holding the event to supply the following:
 - Name, address and phone number of the donor
 - The amount contributed by the donor
 - Date of the contribution
 - Description of any goods or services provided in exchange for the contribution
 - Donation must be cash or cashier's check (not a personal check)
- If you collect checks made out to UNC Lineberger, these must be processed within **2 weeks** of the date on the check.

If any goods and/or services are received in return for charitable donations (i.e. food, beverages, auction purchases, tokens of appreciation, "giveaways" 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.



FAQs—Finance

Who do we make checks payable to?

Please make checks payable to **UNC Lineberger**. In the memo line, please list the name of the event.

Can UNC Lineberger provide me with letters and tax receipts for my supporters?

Yes, there are several letters that UNC Lineberger can provide. However, please note that we are unable to provide tax receipts for gifts or contributions that are not received by or made payable directly to UNC Lineberger.

Documents that we can provide are as follows:

- Authorization letters to be used to validate the authenticity of the event and its organizer.
- Acknowledgment letters and tax receipts for contributions made payable directly to UNC Lineberger.
- Acknowledgement letters and tax receipts for contributions where complete donor information (amount of gift, name, address, phone/email) was collected by the event organizer and payment was provided in the form of cash or a cashier's check.

Can I use the UNC Lineberger tax-exempt number to buy supplies related to my event?

No, UNC Lineberger cannot provide our tax-exempt number to event organizers to make purchases related to their event. However, if a business makes an in-kind donation to the event and would like the tax-exempt number for tax purposes or to verify the tax status of UNC Lineberger, we will provide the tax identification number to that business upon request.

Who will cover my event expenses?

The event organizer is responsible for covering all expenses for their event. Your event costs should be deducted from the funds raised prior to sending the donation to UNC Lineberger.

ONLINE FUNDRAISING

An easy way to collect donations for your event is to set up a fundraising page with UNC Lineberger. You will be able to make it unique to your event and share the link with friends and family. Groups can also use these pages to fundraise as a team.

Questions?

If you need help understanding our policies, please call our office at 919.966.5905. We are happy to walk you through the details.



Marketing & Communications

Early in the planning stages, you need to develop a communications plan. After all, how can your event be successful without spreading the word to potential attendees or participants?



PUBLIC RELATIONS

Creating and posting press releases, public service announcements, advertisements, printed materials (posters, brochures, flyers, tickets, invitations, etc.) are the responsibility of the individual/organization coordinating the fundraising activity.

Anything using the UNC Lineberger logo (press releases, t-shirts, signage, etc.) must have approval before release. For approval, email the files to elizabeth_rubio@med.unc.edu or fax to (919.966.8030).

PROMOTIONS

The cancer center does not sell goods or services from outside organizations but we may help promote through UNC Lineberger internal media and select publications.

DONORS AND VOLUNTEERS

For confidentiality reasons, UNC Lineberger cannot release donor or volunteer lists to an individual, company, group or organization. UNC Lineberger is unable to provide marketing or support staff (e.g. gift-processing, event organizing, and recruitment of event sponsor/participants).

LOGOS AND STYLE GUIDE

Always use periods in N.C. Cancer Hospital and put “UNC” in UNC Lineberger. Learn more about these and other guidelines in our Style Guide at www.unclineberger.org/branding. Our logos can be found there as well.

SPEAKING REQUESTS

On occasion our researchers, clinicians and staff are available to speak and/or participate in third party events. To request a speaker at your event, contact

Elizabeth Rubio at (919) 966-5905 or (elizabeth_rubio@med.unc.edu) and allow as much time as possible. Note, we do not have relationships with celebrities, nor will we ask them to speak at or participate in your events.

COMMUNICATIONS & PRINTED MATERIALS

- The UNC Lineberger and UNC logos are registered trademarks and cannot be reproduced without written permission from UNC Lineberger. You can learn more about appropriate use of our name and logo by visiting: www.unclineberger.org/branding
- 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 no conflicts with other key event sponsors or donors currently supporting UNC Medicine.
- 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 for appropriate references to UNC Lineberger, as well as language regarding charitable deductions.

Best Practices

Anyone can plan an event. Simply set a goal, decide what you want to do, who you want to be there and who can help you get them there.

EVENT PLANNING TIMELINE

- Choose the type of event you wish to plan
- Define your audience (friends, neighbors, co-workers, community)
- Set a fundraising goal that makes sense
- Create a budget based on your goal and determine overhead costs
- Recruit a planning committee and assign leadership roles
- Select location, date and time
- Define your event—who/what/when/where/why and how you plan to raise money
- Solicit and secure corporate sponsors
- Promote, promote, promote!
- Execute—pay attention to the details
- Analyze and wrap up the books
- Thank your sponsors, donors and volunteers

GENERAL RULES OF THUMB

- Allow plenty of time to plan your event. At least 2-4 months is recommended for smaller events; 4-6 months for larger ones.
- Set a realistic fundraising goal. Exceeding it is part of the fun!
- Expenses should be limited to 25% of the gross income from the event. If event expenses are greater than the money raised by the event, the event organizer is responsible for those expenses.
- Round-up your volunteers and committee members early in the process so they can put it on their calendars and help you spread the word, identify sponsors or auction donors—it takes a team to plan a well-coordinated event
- Food and beverage expenses are often the highest budget items. Reach out to local restaurants where you frequent to see if they would be interested in an in-kind donation or discount for your event.
- Brainstorm additional revenue streams for your event—sell mulligans at golf tournaments, signature cocktails at receptions, silent auction, etc.
- Make sure your committee chairs and volunteers wear nametags or special outfits that identify them to attendees as someone who can help or answer questions.
- Keep clean, easy to decipher financial records for your event.
- Reach out to local TV, radio and print publications weeks prior to your event and continue to follow-up.
- Maximize social media—send an email and ask your friends to forward it, post on Facebook, Twitter, etc.
- Always have a “Plan B” for rainy weather.
- If you need help, call our office at 919.966.5905—we’re happy to share ideas and offer guidance.

EVENT SUGGESTIONS

Art show
Auction (live and silent)
Bake sale
Barbecue
Book sale
Car wash
Chili cook-off
Comedy night
Concert
Craft fair
Dinner party
Gala / Dinner
Golf tournament
Ice cream social
Jewelry sale
Lemonade stand
Pancake breakfast
Picnic
Pie eating contest
Run/Walk/Hike
Scavenger hunt
Spaghetti dinner
Talent show
Theater Show
Yard Sale

Thons:

Bowl-a-thon
Dance-a-thon
Run-a-thon
Read-a-thon
Skate-a-thon
Spell-a-thon
Walk-a-thon

Tournaments:

Board game
Dodge ball
Golf
Soccer
Softball
Tennis



Our Services

The UNC Lineberger Office of External Affairs can help support you during your fundraising efforts in a variety of ways. Give us a call if you want to brainstorm or have any questions.

We are grateful for our community event organizers and can support your efforts in a number of ways by providing:

- A letter with tax-exempt information on official UNC Lineberger stationery for the organizer to use in its fundraising and sponsor recruitment efforts.
- Advice for event organizers regarding fundraising, finance, public relations, marketing, event promotion, etc.
- Provide you with a link to your own on-line fundraising page.
- Materials for your event such as brochures, lapel pins, etc.
- Information regarding 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.
- Promotional materials review and provide a UNC Lineberger logo (if event materials are approved for use).
- Event promotion on the UNC Lineberger website, calendar and other appropriate social and traditional media.
- Letter of appreciation (including a gift receipt for charitable contributions) to sponsors, donors and volunteers.
- Tours of the N.C. Cancer Hospital and other areas of UNC Lineberger.

Depending on schedules/type of event, we may be able to provide:

- A UNC Lineberger representative to attend the event.
- An event speaker—researcher, clinician, development officer, patient or survivor.
- Custom fundraising website for your event.
- Regular fundraising reports for online giving donations.
- Volunteer story to appear online or in print publications.



FAQs—Services

Can I use the UNC Lineberger name and logo to promote my event?

Of course! Prior to use, please be sure to submit to the Office of External Affairs for approval, all materials on which you would like the UNC Lineberger name and/or logo to appear. We will need to review all invitation copy, advertisements, and printed materials related to the event before printing and distribution.

Can UNC Lineberger provide me with a list of supporters, donors or volunteers?

No, we cannot provide mailing lists of donors, patients, physicians, staff or vendors, as it is our policy to keep records confidential.

Can UNC Lineberger help spread the word about my event?

Absolutely! As soon as we approve your event, we are happy to help promote it on our website, social media and in appropriate UNC Lineberger publications.

Can UNC Lineberger solicit corporate sponsorship for my event?

We cannot solicit corporate sponsors for your event; however UNC Lineberger would be happy to provide you with a sample letter to aid in your sponsor solicitation efforts.