

## **Penn State Health Milton S. Hershey Medical Center Community Fundraising Guidelines**

### **DEFINITION**

A Community Fundraiser (“Fundraiser”) is defined as an organization, group or individual raising money on behalf of Penn State Health Milton S. Hershey Medical Center, Penn State College of Medicine or any of its related entities through a fundraising event or initiative.

### **HOW WE CAN HELP**

Penn State Health Milton S. Hershey Medical Center is grateful to those interested in supporting our endeavors in education, patient care, research, and community outreach. We recognize the great amount of hard work you will assume on our behalf and want your event to be a success.

Please carefully review the following guidelines, which have been designed for the protection of the Fundraiser and Penn State Health Milton S. Hershey Medical Center, Penn State College of Medicine, and its related entities.

### **The Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine can:**

- ✓ Provide advice for initial event planning to share strategies, suggestions, resources, and samples.
- ✓ Be a resource for questions throughout the planning process.
- ✓ Acknowledge event organizer for direct contributions to the hospital.
- ✓ Confirm the relationship between the event and the hospital for tax-exemption status. [Read more about Contributions and Funds Raised](#)
- ✓ Permit use of the Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine name and logos for your event. [Read more about Logos/Photos/Website](#)
  - \* All printed materials **must be approved** by the Office of University Development to ensure proper use of Penn State Health Milton S. Hershey Medical Center-approved nomenclature and logos.
- ✓ Provide limited Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine supplies (pens, notepads, etc.) for the event (based on availability).
- ✓ Schedule an organization representative to attend/speak at the event or to the planning committee about the mission of Penn State Health Hershey Medical Center/Penn State College of Medicine (based on availability).
- ✓ Organize a check presentation and/or a tour for the event planning committee.
- ✓ Review pre and post-event press releases. [Read more about Marketing/Promotion/Publicity](#)

### **Additional helpful information:**

- [Permits/Expenses/Liabilities](#)
- [Guidelines for Sponsorships, Silent Auctions, Raffles, and Donations](#)

## GUIDELINES FOR THE FUNDRAISER

### Approval

- The Associate Director, Community Fundraising and Cause Marketing must approve the fundraiser in advance of the event and will ensure the event follows Penn State Health Milton S. Hershey Medical Center guidelines and is consistent with its mission and values. Please note:
  - The Associate Director, Community Fundraising and Cause Marketing will respond to your application within ten (10) business days.
  - Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine will not be involved in an event that promotes a political party, candidate or appears to endorse political issue(s).
  - Due to limited resources, Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine staff, physicians, and faculty members are unable to help plan, manage, and execute Fundraisers.
  - The Fundraiser cannot use Penn State University's or Penn State Health Milton S. Hershey Medical Center's EIN's and tax-exempt status to apply for funding.
    - However, if a business makes a donation to the event and would like the tax-exempt number for tax purposes or to verify the tax status of Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine, we will provide the information to the business upon request.
  - Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine representation at the event must be requested at the time of application. Due to the large number of requests, we cannot guarantee that a Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine staff person (including medical staff) will be able to attend/participate.
  - Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine will not provide mailing lists for donors, patients, staff and/or employees for fundraising purposes and is unable to mail information on behalf of the event.
  - Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine will not solicit sponsorship for fundraising events on behalf of the organizer and will not sponsor community fundraising activities that benefit the institution.
  - Each application will be considered individually. Generally, events that will not be authorized are events that:
    - Do not support the mission and values of Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine.
    - Would potentially conflict with a marketing or public relations campaign.
    - Would require Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine to sell tickets, coupons, etc. or involve telemarketing or door-to-door solicitation.

## Permits/Expenses/Liabilities:

- The Fundraiser is responsible for obtaining all permits, especially those for raffles and/or games of chance. Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine will not be involved, in any manner, with obtaining liquor permits.
- The Fundraiser is responsible for covering all expenses for the event. Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine will not incur costs for an event, and will not be able to reimburse the Fundraiser. Event costs should be deducted from the funds raised prior to sending the donation to Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine.
- Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine is not liable for any injuries sustained by event coordinators, volunteers, participants, or any other individuals related to an event benefiting Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine or an affiliate.

## Contributions and Funds Raised:

- *The Pennsylvania State University is an instrumentality of the Commonwealth of Pennsylvania. Since 1968, the Pennsylvania State University has owned and operated The Penn State Health Milton S. Hershey Medical Center, a 501C3 not-for-profit organization, as a university-affiliated facility. All charitable donations to the Medical Center are processed, deposited, and receipted for tax purposes by the Pennsylvania State University and transferred to the Penn State Health Milton S. Hershey Medical Center, where the gifts are spent based on the donors intent.*

*Charitable contributions to the Pennsylvania State University are deductible against the taxable income of individuals, corporations, and other taxpayers.*

- Funds raised can be used to provide unrestricted support or can be designated to support a particular institute (i.e. Children's Hospital, Cancer Institute, Heart and Vascular Institute) or a particular program or area (i.e., Child Life, patient care, research, etc.).
- If the Fundraiser is:
  - A 501(c)(3) organization, all checks shall be made payable to, mailed to, processed by and receipted by the Fundraiser. Event proceeds should be mailed within 30 days (in one check payable to Penn State University) to:

Penn State Health Milton S. Hershey Medical Center  
Office of University Development, Mail Code HS20  
Attn: Megan Weber  
1249 Cocoa Avenue, Suite 115  
P.O. Box 852  
Hershey, PA 17033.
  - Please note the institute or program designation in the memo line.
  - **NOT** a 501(c)(3) organization, the proceeds shall be mailed within 30 days (in one check) from the Fundraiser (payable to Penn State University) to the address noted above. It shall be stated on all

event materials that gifts to the event are not tax-deductible.

- Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine will not accept funds from individuals or organizations that fail to comply with any municipal, county, state and/or federal law.

### **Marketing/Promotion/Publicity:**

- Publicity may not suggest that the event is being sponsored, co-sponsored, or produced by Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine, but instead must state that Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine is the beneficiary. All publicity must specifically state within the marketing materials that the event is ***“an independent fundraising event benefitting Penn State Health Milton S. Hershey Medical Center.”***
- The Fundraiser is responsible for marketing and promoting the event, including media, press releases, posters, flyers, and advertising. Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine reserves the right to review and approve all such marketing materials in advance of publication.
- The Fundraiser is not permitted to use Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine letterhead. If/when the event is approved, a letter of support will be provided to validate the event and support event solicitation activities.

### **Guidelines for Sponsorships, Silent Auctions, Raffles, and Donations (where goods and/or services are received):**

- **Charitable Laws:** Events must comply with all federal, state, and local laws governing charitable fund raising, gift reporting, and special events.
- **Sponsorships:** Sponsorships with no goods and/or services may be fully tax-deductible. This includes sponsorships that receive advertisement space in a booklet for the event. (These are not considered advertising so long as there is no commercial content such as, “Come in and Buy” or “Our product is the best”). Name, slogan, and logo of the sponsor can be used.
- **Tax Deductibility for Event Ticket Price:** The IRS requires that all tickets, invitations, or entry forms state what portion of the ticket price is tax-deductible if the price is beyond the fair market value of the event itself. For example: A gala dinner costs \$100 per person for the entertainment, food, and drink; the cost of the ticket to attend the gala is \$250; only \$150 of each ticket sold is tax deductible.
  - Tickets and/or promotional flyers which invite people to sign-up or purchase tickets must state the portion which may be tax deductible. (In the case above, it would say, “\$150 of the ticket price may be tax deductible.”) the Development Office can assist in proper wording.
- **Silent and Live Auctions:**
  - Each item of a Silent Auction should be valued at the Fair Market Value. This value must be listed on the Bid Sheet at the auction table, as well as in any printed list of the auction items.
  - Each item of a Live Auction should be valued at the Fair Market Value and that value must be listed on a printed list of the auction items.
  - Donors of the item for Silent and Live Auctions should provide the Fair Market Value of their item. If the item is a ‘collectible’ reasonable efforts should be made to assess the value (e.g.

- contact an antique or collectible dealer who has some knowledge of similar items).
- Only winning bids that are over the stated Fair Market Value will receive receipt information on their charitable gift.
- If an item is not valued, or valued at priceless, the final auction bid then establishes the item's fair market value, therefore no portion is tax-deductible.
- **Raffles:** There is no charitable gift for a raffle ticket, lottery or any game of chance. No receipt will be issued for money collected through these means.

#### **Logos/Photos/Website:**

- Logo use is not permitted without approval from Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine. This includes downloading Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine logos from the Internet.
  - Printed materials in which the name and/or logo of the H Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine must follow comply with Visual Communication Standards and Brand Guidelines (<https://faculty.med.psu.edu/resources/style-guide/>).
  - All individuals, groups, and organizations (both on- and off-campus) that desire to use the Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine indicia (marks, names, and logos) on promotional merchandise (bag, t-shirt, sweatshirt, etc.) must receive written approval from the Office of Licensing Programs (<http://licensing.psu.edu/licensing-guidelines>) prior to the production of any products bearing these indicia. Furthermore, only manufacturers that are licensed (<https://clc.com/license-search/>) by the University are authorized to produce Penn State merchandise.
- Photos on Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine websites are the property of Penn State Health Milton S. Hershey Medical Center, and reproduction of photos is not permitted without approval from Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine.
- If logo/photo use is permitted, all materials using the logo/photo must be submitted to the Associate Director, Community Fundraising and Cause Marketing at least three (3) weeks prior to the print deadline. The submission must be "proof" quality to represent the true nature of what is being produced.
- Event logos may be developed, but must remain separate and distinct from the Hershey Medical Center logo(s). Penn State Health Milton S. Hershey Medical Center/Penn State College of Medicine reserves the right to approve Fundraiser event logos prior to it being used in print or other media.