

With our Lend A Hand Up planning guide, we are here to help you host a successful benefit to raise help and hope for someone facing serious medical challenges. Our step-by-step planning guide includes tips, templates and examples to serve as a springboard for you to host your own unique fundraising effort.

In addition to fundraising tools, Lend A Hand Up offers *BOOST* funding to increase the success of efforts to help individuals residing in Cass County, ND and Clay County, MN experiencing catastrophic health conditions.

Learn more about Lend A Hand Up eligibility guidelines: [Apply for Boost Funds](#)

GETTING READY – Plan a Successful Benefit/Event

Step 1. Develop a Fundraising Strategy

A. Gather people willing to share time and expertise for a fundraising effort

Contact friends, neighbors, co-workers, family members, churches and other organizations connected to the person you are raising help for. Also contact individuals, businesses and organizations you and other volunteers are affiliated with. Try to involve people with diverse talents who can help with technology, promotions, accounting, silent auction, raffle, food prep and event serving. Gather input to determine the best fundraising strategy and to form a core team of volunteer leaders to ensure commitment and support for the event. Determine a fundraising champion to oversee meetings and communication.

Helpful Tool: [Affiliation Worksheet](#)

B. Plan fundraising activities based on expertise, affiliations, time and space available

Review the advantages of a pancake breakfast at a church compared to an event at a school, community center or local business. Review the advantages of a theme or activity based on the recipient's interests such as bowling, golf, hockey, art, singing or dancing. Consider the pros and cons of a weeknight versus a weekend event, other community events and how time of year and weather may affect attendance.

See below for ideas:

- Community event with food, entertainment, auction, raffle, craft/bake sale and/or speakers
- Bowling, biking, golf or walk/run event
- Activity coordinated with a church, neighborhood or association meeting

C. Determine whether you need a local permit for fundraising activities

- A local permit is not required to conduct a silent auction where the highest bidder secures the item, nor to sell food or other items at set amounts.
- A local permit is required to conduct a raffle or other game of chance. In some states, a raffle is permitted only if the recipient is a nonprofit organization. The process to gain a permit may take up to 30 days and involve a fee. Check with your city office/auditor or town council. In Fargo, 701-241-1304.

Learn More: [ND Permit Guidelines](#)

Learn More: [MN Permit Guidelines](#)

D. Develop a timeline

List all tasks and target completion date for each; Follow-up, review and update regularly.

Helpful Tool: [Timeline Worksheet](#)

E. Develop a budget

Prepare a spreadsheet with anticipated expenses. Costs may include: facility, entertainment, food and promotional items such as printing flyers and signs; Review and update regularly.

Helpful Tool: [Budget Worksheet](#)

Step 2. Set up an Individual/Family Benefit Fund

Establish a benefit fund at a local bank or credit union to insure that donations are properly managed and accessible to the recipient/family. A benefit fund is a short-term account to assist volunteers and the recipient/family with collecting donations, paying bills and distributing funds. Banks rarely charge to establish a benefit fund and usually set them up as short-term, non-interest bearing accounts. Gifts made to an individual/family benefit fund are generally not considered to be tax-deductible gifts, nor reportable income.

A. Determine a benefit fund name

Generally, the title of the fund includes the name of the person experiencing a medical challenge – the recipient of the fundraising campaign. For example, John Doe Benefit Fund.

B. Carefully choose benefit fund title signers (authorized account managers)

The recipient and fundraising champion should carefully determine who will serve as authorized signers for the benefit fund and how the account will be used. To qualify for Lend A Hand Up boost funding, a benefit fund must be established at a local bank or credit union with at least two title signers. One signer must be the recipient or a family member. The other signer should be the fundraising champion or another trustworthy individual who is not an immediate family member nor lives in the same household as the recipient. Additional signers may be requested by the financial institution or recipient. If the individual receiving proceeds is receiving assistance through Medicaid, SSI, or other programs, it is recommended they review how being an authorized signer on the account may affect benefits.

C. Set-up a benefit fund at a local bank/credit union

When setting up a new benefit fund, authorized signers should be prepared to provide:

- The title and purpose of the benefit fund
- Names and social security numbers (or other tax identification) for authorized title signers
- How deposits will be made
- How funds will be utilized. (If funding may adversely affect the recipient's eligibility for assistance under Medicaid, SSI or other programs, review how family members may serve as account managers.)

- Consideration what would happen to funds if authorized signer(s) are no longer able to serve, or in the unfortunate event of the recipient's death
- Whether the account should be interest-bearing (it's generally recommended that the account be non-interest bearing to eliminate reporting requirements)
- What type of information will be made available and/or reported. For example, will deposit records include donor names and addresses for tracking and sending thank you letters?
- How long the fund will remain active

Step 3. Secure site, date and time

Before scheduling, check community calendars for awareness of major events. Book facilities as soon as possible for planned fundraising activities based on what is most likely to draw the most support from friends and family of recipient. Begin to request the support of major contributors for food, entertainment and other activities.

Step 4. Apply for Lend A Hand Up *Boost* Funding

If hosting a benefit to help a resident of Cass County, ND or Clay County, MN who is experiencing financial hardship due to a serious medical condition, you are encouraged to apply to Lend A Hand Up for:

- Free online fundraising tools
- Personal coaching
- Up to \$5,000 of boost funding to support your event and online campaign

A. Review Lend A Hand Up eligibility criteria: [Apply for Boost Funding](#)

Step 5. Organize Activities

Assign volunteer leaders to form teams and complete tasks as needed to gain support, as well as prepare and host fundraising activities at the event itself. It's recommended that volunteer leaders meet routinely to share updates and review future 'to dos.'

A. Organize volunteers - Develop a plan for volunteer involvement including who, what, when and where.

- Determine volunteer categories (marketing, pick-up/delivery, decorating, food prep/serving, clean up)
- Determine the number of volunteers needed for each category
- Develop timeframes for volunteer help
- Contact potential volunteers to coordinate their help by task and timeframe
- Make volunteer reminder calls 2-3 days prior to activity to confirm location, times and tasks

Helpful Tool: [Volunteer Assignment Worksheet](#)

B. Organize food, music, supplies, and other items

Determine pick-up and delivery of donated items and coordinate preparation/set-up of food, entertainment and other items.

C. Develop donation collection process

Determine a process for collecting financial gifts, tickets, food and silent auction donations.

Helpful Tool: [Ticket Template](#)

Helpful Tool: [Silent Auction Form](#)

Things to consider:

- Where will your welcome and donation collection areas be placed?
- How should checks be written out? Example: Payable to John Doe Benefit Fund.
- Will you use lendahandup.org, another online site or a square to process credit cards gifts?
- Will you sell tickets at a set price or request a free will offering with/without a suggested gift amount?
- Do you need to be present to win raffle or auction items? If not, what information must be included on bid sheets or tickets for later contact and delivery? Where will items be stored until pick-up?
- Is there a cut-off time for bidding on items? Will this be staggered by table?
- What process will you use to collect, track and distribute items per finalized bids/transactions?
- What will you do with any leftover food and items?

Note: A local permit is not required to conduct a silent auction or activity involving the sale of food/items. However, a permit is required to conduct a raffle, 50/50 or other game of chance. There may be a cost of up to a \$25 to obtain a permit, and it may take 30 days or more. For more information regarding permits and raffles, contact your city office/auditor or town council office. In Fargo call 701-241-1304.

Learn More: [ND Permit Guidelines](#)

Learn More: [MN Permit Guidelines](#)

PROMOTING YOUR EVENT

Step 6: Promote Activities

Develop and distribute flyers and other promotional items to build awareness and request support.

A. Develop a flyer

Use flyers to build awareness about the event and to secure volunteers, silent auction items, financial gifts and other forms of support. To view examples of other flyers, go to lendahandup.org/give

Helpful Tool: [Flyer Template](#)

Flyers should include:

- Brief summary of the individual/family experiencing a crisis, along with a picture
- Details about fundraising event to include date, time, location and activities
- Cash/check and online donation options – including boost funding perks through lendahandup.org
- Major sponsors and contact information for the fundraising champion/others

B. Develop an appeal letter if soliciting support by mail

Consider adding a cover letter along with a flyer if using direct mail to request support. A donation form may be attached to the appeal letter and/or flyer to make it easier for the donor to document information about the value and description of the donated item, along with their information.

Helpful Tool: [Appeal Letter](#)

C. Develop contact lists for flyer distribution

Use the Affiliation Worksheet (step 1) and expand upon it as a contact list for flyer distribution.

Helpful Tool: [Affiliation Worksheet](#)

D. Distribute flyers Divide contact lists or “pool resources” to coordinate the distribution of flyers by mail, email and personal delivery as soon as possible - at least 2 weeks prior to scheduled activities.

E. Acknowledge and record donations

Donations made to benefit an individual/family are not considered by the IRS to be tax-deductible gifts, so it is not necessary to receipt donors. You may, however, send personal notes acknowledging gratitude.

Helpful Tool: [Donation and Silent Auction Tracking Form](#)

Helpful Tool: [Donation Tracking Form](#)

F. Use social media to promote your event and raise online gifts

View Lend A Hand Up’s “[How to Host an Online Campaign Guide](#)”

G. Develop and distribute a news release

A news release may be developed to expand public awareness through local print and broadcast media.

The release should include:

- Release date
- Contact information for fundraising champion (or other appropriate individual)
- Headline (for example, Spaghetti Benefit for John Doe Family)
- Brief story regarding the person or family in crisis
- Details about the fundraising effort to include event date, time and location
- How to contribute online, by cash or check to help the family
- Information regarding sponsors and boost funding
- Information regarding interview or other promotional opportunities

Helpful Tool: [Press Release Template](#)

Helpful Tool: [Media Listing Cass and Clay Counties](#)

AT THE EVENT

Step 7: Conduct Activities

A. Oversee fundraising activities

- Allow adequate time for set-up and food preparation.
- If many volunteers are involved, consider a volunteer “check in” table with posted duties and shifts.
- Determine in advance whether volunteers will have name badges or specific attire to identify them.
- Throughout the event, maintain at least two volunteers at the registration table to welcome guests and oversee the collection (and safety) of donations.
- If holding a silent auction or sale, make sure volunteers are spread out to facilitate bids/sales. If there are many silent auction items and/or the event covers a wide timeframe, it may be best to stagger the closing of tables. Identify or announce when tables are closing. Highlight highest bids immediately!
- Determine in advance what you’ll do with remaining food and items.
- Remember to take pictures!

At the end of the event, have two volunteers work in tandem to count the funds raised to assure accountability. Determine in advance who will be in charge of depositing the proceeds.

AFTER THE EVENT

Step 8: Deposit Proceeds

A. Deposit donations

Deposit fundraising proceeds into the individual/family benefit fund at the bank as soon as possible.

B. Pay any remaining expenses

Pay outstanding expenses and update the budget spreadsheet (Step 1) to determine fundraising proceeds.

Step 9: SECURE BOOST FUNDING

A. Report donations and/or other information as necessary to acquire BOOST funding

In follow-up to your fundraising effort, you will need to show documented proof that donations were made and deposited into the benefit fund at the bank or credit union. This information should be shared about 2 weeks past the date of a fundraiser to allow opportunity for additional contributions to be made.

A bank statement is accepted as documented proof of donations as long as it includes the following:

- Name of the benefit fund, along with name and address of the bank where the account is held
- Amounts deposited (and withdrawn) by date for the fund during the 90 day campaign

Helpful Tool: [Bank Statement Example](#)

B. Coordinate Lend A Hand Up boost award check presentation

Upon receipt of the bank statement, the Lend A Hand Up online giving page for this individual/family fund will be closed. No further gifts will be processed once the giving page is deactivated. The bank fund, however, may remain active for a much longer time period.

The fundraising champion will be contacted when the boost awards check is ready. The check will be made payable to the individual/family benefit fund at the bank or credit union. The fundraising champion will be asked to coordinate a day, time and location for the check to be presented to the recipient. The fundraising champion should also be present when the boost check is presented. Other volunteers and family are also welcome to join together to celebrate fundraising success. A picture with a 'big check' may be taken – or not (based on personal preference). The check may be presented at: Dakota Medical Foundation, the bank holding the benefit fund, the home of the family, the volunteers' meeting spot, the place where fundraising activities were held, a worksite or another location chosen by the family.

C. Deposit matching funds/additional donations

Deposit the boost awards check into the benefit fund at the bank in a timely manner.

D. Update the budget spreadsheet with final expense and donation totals

An example of a Budget Worksheet is included at the end of Step 1.

E. Distribute/Utilize funding

Title holder(s) of the benefit fund should work with the recipient, the fundraising champion and others as necessary to determine the "optimal" method of fund use and distribution. The management and distribution of fundraising proceeds will vary based on the unique medical and financial situation of the recipient.

Some things to review:

- How funding may affect the recipient's eligibility for medical assistance or other programs.
- How long the benefit fund should remain active.
- The pros and cons of having account title holders make payments directly to providers on behalf of the recipient versus the immediate transfer of funds to the recipient's personal account.

It is recommended that the individual/family benefit fund at the bank (or credit union) remain open as long as there are future donations or boost awards and/or match funds anticipated.

F. Close the benefit fund when funds are depleted or transferred to another account

EXTENDING GRATITUDE

Step 10: Acknowledgment

A. Acknowledge contributions and other forms of support.

Show appreciation to individuals, businesses, organizations and all who supported the success of the fundraising effort. You may use the *Donation Acknowledgement Letter* template (Step 4) to thank others using mail or e-mail. Or consider a more public thank you via:

- Letter to the editor in local newspaper
- Print Ad
- Church bulletin announcement
- Company or association newsletter
- Facebook, Instagram, Twitter and/or other forms of social media

Helpful Tool: [Community Thank You Template](#)

B. Share feedback with Lend A Hand Up and others.

Fundraising champions are asked to complete a follow-up survey to share results, challenges, ideas and successful strategies. They are also asked to evaluate Lend A Hand Up fundraising tools.

Helpful Tool: [Fundraising Effort Follow-up Survey](#)

C. Stay connected to help future families!

There are many ways to stay engaged with Lend A Hand Up to help your neighbors:

- Attend or support a fundraising effort for a local family.
- Refer others to Lend A Hand Up.
- Make a contribution to Lend A Hand Up on Giving Hearts Day, at year-end, as a memorial – any day.
- Lace Up for Lend A Hand as a charity runner in the Fargo Marathon or another athletic activity.
- Attend/support a fundraiser for the program such as Bowlin' for the Colon, Stick it to Cancer, etc.
- Purchase a PushSave mobile coupon book, choosing Lend A Hand Up as your favorite charity.
- Open up a door to a new sponsor, or speaking opportunity.
- Coordinate your own fundraiser or service club event.

Contributions to the Lend A Hand Up program are tax-deductible gifts. Since Dakota Medical Foundation covers all administrative expenses for Lend A Hand Up, 100% of gifts are distributed to help families.

Together, we can make a greater impact to help our neighbors when life matters most!