

Tips to think about before planning a benefit.

You just found out that a family member or a friend has cancer. What is the first you think about? How can I help? I know I will plan a benefit to raise money for them.

Although this is admiral thinking there is some things you want to think about first before proceeding with the fundraising plans.

Here are some tips to do first:

1. **Ask-** Correct ask first. What in case they don't want the help, they don't need the financial help, they don't want their private information out there for everyone to see. Holding an event like this can be a private matter. It is not like a birthday party where you invite a few friends this is an event where you invite everyone including the general public. So ask get their permission.
2. **Investigate-** Find out what kind of help they need and how much they need to be sustainable during their medical crisis. Putting on a benefit with the thought of whatever I am able to raise for them is better than none is not the right attitude to go into it. You could do more harm than good. People generally don't like seeing more than one fundraiser for an individual so when you do it you need to do it right. It is truly about making a big impact in their lives. It is good to have a third party sit down with the family to figure out a game plan ( a budget) of what their current and future needs will be during the medical crisis. Financial planners or budget coaches are usually good at helping with this game plan. Also to figure is there more than the financial need, do they need help with rides to the doctor, babysitting of the children, making meals, cleaning, yard etc.... This is something you can help schedule and coordinate. Bottom line what is the individuals and the family's needs and then how can we help them.
3. **Fundraising-** With a game plan of what they need now you can move on to the next phase of the planning whether it be fundraising or giving them a helping hand you are moving in the right direction. With the game plan that has been created you should have a picture that if funds are to be raised you have a \$ goal in mind to be able to help the family in being sustainable during the medical crisis. Now you are going to want to create an event budget that will have how you will raise the funds need. You will need to figure what fundraising activities you will have and a goal for each activity of what you would like it to raise to reach your goal. You will also need to factor in there will be expenses such as food, DJ, t-shirts, basket item filler, etc.... plan out what expenses you think you will have with the ultimate goal of getting what you can donated.
4. **Accountability-** Where are the funds going and what is expected of those funds. Yes have a game plan with your family of where the funds raised will be directed into such as which bank account. A separate fundraising bank account or into the personal account (which I would highly recommend against this). Make sure to contact your accountant or tax preparer for how funds received should be allocated on your taxes. Also what is everyone expecting the funds to go towards? The medical bills, the living expenses (such as rent, mortgage, gas, food, etc....) or both, handicap equipment, to go on a vacation trip, to buy a boat or motorcycle, etc.... If there is an expectation of where the funds are to go to make sure you communicate

that before planning the event and that the family and the planning team are on the same page. If the planning team and donors are thinking medical and basic living expenses and the family is thinking a nice Hawaiian vacation there will be issue later on..... Will someone from the team watch and allocate the funds or will you trust the family to do it if there is an expectation.

5. **Liability**- If something goes wrong with the event who will take on the responsibility of the liability. You serve alcohol at your event that is at a park (did you get a liquor license? Is there going to be a fine?) are you having raffles at the event (if not working with a nonprofit and the Gaming Dept. finds out who will pay the fine?) you personally make the food at the event ( people end up getting sick, who will be paying if there is any hospital expense). The possibilities are endless and all you wanted to do was a good deed. Or the other possibility of liability for the individual you are planning the event: are they going through a divorce who gets the money from the event, do they have a lawsuit against them, are they on SSI what happens to their SSI money? Knowing their situation will help you in knowing how to help them?

These are just some of the things to consider before jumping in and planning a benefit for a family or friend. Contact Community benefit Tree we are a resource center in helping you, help someone in need and guide you and them in the right direction.