

Alzheimer *Society*
T O R O N T O

third party fundraising handbook

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Introduction

First and foremost, thank you so much for your interest in supporting the Alzheimer Society by planning a third party event! Your support helps us work toward our vision of a world without Alzheimer's disease while helping all those currently affected by dementia in your community.

This Manual

This manual is designed to help you organize a successful and enjoyable event and comes with helpful tools such as fundraising ideas and guidelines.

Please feel free to contact us should you have any questions about hosting a third party event:

Bojana Milanovic
Special Events Manager
bmilanovic@alzheimerontario.org
416-640-6315
Alzheimer Society of Toronto
20 Eglinton Ave. West, 16th Floor
Toronto, ON M4R 1K8

What is a Third Party Event?

A third party event is one that is organized by an individual, affiliated group or organization, for the purpose of raising funds for — or on behalf of — a chosen charity with that charity's approval.

The Alzheimer Society benefits from third party events by:

- Raising awareness.
- Interacting with those affected by the disease.
- Receiving financial support from event net revenues for programs and research initiatives.

You can help the Alzheimer Society in some, or all, of these ways by hosting your own event! Read through this manual to learn more about how you can host your own third party event in support of the Alzheimer Society.

Alzheimer's Disease

Alzheimer's disease is a neurodegenerative disease that results in loss of memory, disorientation, and difficulty performing everyday tasks, as well as mood and behavioural changes and changes in personality. The effect of the disease is devastating to those living with it, as well as their caregivers, families and friends. Today, **over 747,000 Canadians** across the nation are affected by Alzheimer's disease and this number will increase rapidly as the majority of the population reaches the age of heightened risk for developing the disease.

The Alzheimer Society

We envision a world without Alzheimer's disease and related dementias. As we work to eradicate the disease, the Alzheimer Society provides support to Canadians affected by dementia through counselling, support, education, raising awareness and by funding research to find a cure. Our work would not be possible without the help of our wonderful volunteers, community leaders, sponsors and supporters, so we thank you for considering us as your fundraising cause!

Getting Started

If you're interested in running a Third Party Event in benefit of the Alzheimer Society, please follow the steps below:

1. Carefully read through **How We Can Support Your Event** (page 3).
2. Complete and submit to us the **Third Party Waiver and Liability Release Agreement** (page 5) as well as the **Application Form** (page 7).
3. Wait until you receive an approval from us.
4. Use the **Event Planning Checklist** (page 21) to help you plan and run your event.
5. Submit your **Financial Summary Form** (page 13) and the funds you raised for us ***no later than 30 days*** after your event.

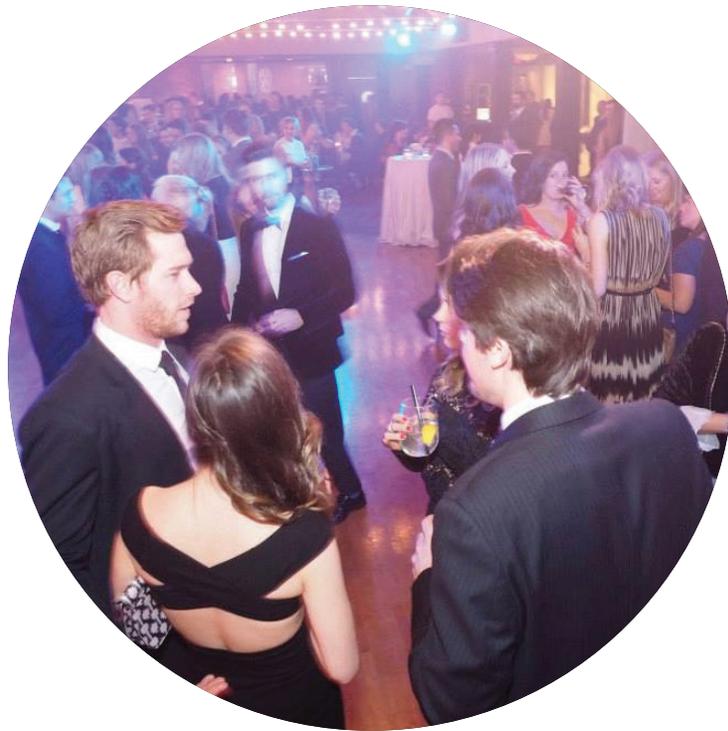
How We Can Support Your Event

The Alzheimer Society CAN:

- ✓ Offer you an online fundraising page for your event.
- ✓ Offer you advice on how to organize your event. We are happy to help guide your fundraising initiative by discussing your ideas with you. Feel free to direct any questions about the Third Party Event application process to us.
- ✓ Help you promote your event by posting on our social media platforms (Twitter and Facebook).
- ✓ Send an Alzheimer Society representative to attend your event, if available.
- ✓ Provide you with Alzheimer Society marketing materials such as brochures and posters. (Please give us notice of one month prior to the event to account for shipping time.)
- ✓ Issue tax receipts, subject to Canada Revenue Guidelines.
- ✓ Authorize the use of our name and logo at your fundraising event for the Alzheimer Society.

The Alzheimer Society CANNOT:

- ✗ Fund or reimburse any event expenses.
- ✗ Provide Alzheimer Society donor or sponsor lists.
- ✗ Guarantee attendance of staff or volunteers at your event.
- ✗ Solicit individuals or companies to acquire donations or sponsorship for auctions or raffles. The event organizer is responsible for any canvassing.
- ✗ Apply for gaming licenses (e.g. bingos, raffles, liquor, insurance) for your event.
- ✗ Provide tax receipts for cash or in-kind goods that were not directly received by the Alzheimer Society office (please also see information on tax receipts).



Third Party Waiver and Liability Release Agreement

Thank you for your support of the Alzheimer Society through your involvement and planning of a third party event.

By signing this form you agree and understand that:

- a. The business/organization/individual will not open any bank accounts using the Society's name or Taxpayer Identification Number (TIN). Any check donations listing the Society as "Payee" will be forwarded to the Society for deposit in a Society bank account.
- b. Only donations made directly to the Society are tax receiptable (to the extent permitted by law). It is recommended that the event organizer makes themselves familiar with the receipting policies of the Canada Revenue Agency (CRA)

<http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>
- c. All publicity (including media releases, print/promotional materials, etc.) for the proposed event must be approved by the Alzheimer Society prior to being printed, released, etc.
- d. Mention of the Alzheimer Society in connection with the initiatives and funds raised must be approved by the Alzheimer Society. Generally, the approved wording is "Proceeds from this initiative will be donated to the Alzheimer Society."
- e. Any use of the Society's name, logo, or stationary in any mailing, advertising, or for the media must receive prior written approval from the Society.
- f. Due to limited personnel resources, the Society cannot guarantee staff support to third party events or initiatives.
- g. The Alzheimer Society must be notified if other organizations will benefit from the initiative.
- h. The Alzheimer Society shall have the right at any time and for any reason to request that the Third Party cease use of the name of the Alzheimer Society in connection with the initiative and the Third Party must comply with such request.
- i. All fundraising is to be conducted for the exclusive benefit of the Society. Any variance must be approved by the Society in advance of the initiative.
- j. The Society does not release volunteer, partner or donor names.
- k. All third party organizers are responsible for providing insurance as required by law, or established business practice.
- l. The Alzheimer Society will not assume any legal or financial liability of a third party initiative. The Alzheimer Society is not responsible for any damage, accidents to persons or property at a community event or any actions in association with the fundraising initiative.

m. The Alzheimer Society in no way endorses any products or services used in connection with the event.

n. This event is no way represents a joint venture or partnership. All proposals for cause marketing must be accompanied by a full business plan.

I individually, or as a representative of the below named business, organization or group agree to the above requirements and hereby fully release and agree to hold harmless the Alzheimer Society and all local affiliates of the Alzheimer Society across Canada, and any other affiliates, their Officers, Directors, Trustees, agents, employees and representatives, successors and entities, together with their insurers, of and from any and all liability, claims, damages, expenses, injury or causes of action for any reason.

DATED THIS: _____ **OF** _____ , _____
Day Month Year

Name(s) of Organizer(s)

Signature(s) of Organizer(s) Date

Signature of Alzheimer Society Representative Date

Please complete, sign and return this form to:

*Bojana Milanovic
Special Events Manager
bmilanovic@alheimertoronto.org
Alzheimer Society of Toronto
20 Eglinton Ave. West, 16th Floor
Toronto, ON M4R 1K8
Phone: 416-640-6315 | Fax: 416-322-6656*

Thank you for your support!

Application Form

Thank you for your support of the Alzheimer Society through your involvement and planning of a third party fundraising event.

Please complete this form to the best of your abilities. Then sign and return to:

Bojana Milanovic
Special Events Manager
bmilanovic@alzheimerontario.org
Alzheimer Society of Toronto
20 Eglinton Ave. West, 16th Floor
Toronto, ON M4R 1K8
Phone: 416-640-6315
Fax: 416-322-6656



This application must be approved by the Alzheimer Society prior to publicizing your third party event in support of the Alzheimer Society.

1. THIRD PARTY ORGANIZER INFORMATION

Contact Name: _____

Group/Organization: _____

Address: _____

Street

City

Province

Postal Code

Phone Number _____

Fax Number: _____

Email Address: _____

2. EVENT INFORMATION

Event Name: _____

Event Date/Time: _____

Event Location: _____
Street City
Province Postal Code

Estimated number of participants: _____

Is this the first time you've held this event? [] Yes [] No [] Do not know

Will this be an annual event? [] Yes [] No [] Do not know

3. EVENT DESCRIPTION

Briefly describe the event or promotion and how the funds will be raised. Describe your target audience, expected attendance and how you plan to advertise. (Please use a separate sheet if necessary.)

4. LICENSES

Does your event or promotion require a license? Yes No Do not know

Please note that the Gaming Services Act (GSA) regulates the following. *Please allow at least 10 weeks to process applications, which fall under the Third party organizers responsibility.*

- 50/50 draws
- Alcohol Permits
- Bingos
- Monte Carlos/Casinos
- Raffles

5. EVENT EXPENSES

Please provide an estimate of the costs associated with your event.

| <i>Item (e.g. venue rental, food, liquor license, etc.)</i> | <i>Estimated Expenses</i> |
|---|---------------------------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |
| 9. | |
| 10. | |
| TOTAL ESTIMATED EXPENSES: | |

6. FINANCIAL PROJECTIONS

Estimated income from the event: \$ _____

Estimated expenses from the event: - \$ _____

Estimated donation to the Alzheimer Society: = \$ _____

NOTE: All event expenses must either be paid directly by the organizer or come out of the event proceeds. For help in budgeting your event, please see **Sample Event Budget Sheet** (page 19).

7. PROMOTION

Do you require use of the Alzheimer Society name and/or logo for promotional use?

No Yes — *If yes, please elaborate:* _____

Do you require an online fundraising tool to collect donations for your event?

No Yes

Do you need Alzheimer Society promotional materials for your event?

No Yes — *If yes, how many?* _____

Do you require a Letter of Support (page 20) that validates the authenticity of the event?

No Yes

Do you require an Alzheimer Society representative to attend your event? (We will do our best to accommodate.)

No Yes

8. COMMUNICATION PLAN

Please detail your communications plan and where and when you will be using the Alzheimer Society logo, name or other property belonging to the Society.

9. WHY DID YOU CHOSE US?

What made you choose the Alzheimer Society as the benefactor of your fundraising initiative?

10. PLEASE SIGN & DATE

Signature(s) of Organizer(s)

Date



Financial Summary Form

Thank you for supporting the Alzheimer Society! Once you have finished your event please complete the form below and attach all raised funds for submission.



Please complete and submit this form *no later than 30 days* after your event. Contact us to arrange a drop-off of the funds raised.

Event Name: _____

Event Organizer: _____

Contact Info: _____
Phone _____ Email _____

NET REVENUE SUMMARY

Cash / cheque donation (receiptable) \$ _____

Non-receiptable donations
(e.g. ticket sales, auction, raffle) + \$ _____

Subtotal \$ _____

Total Expenses - \$ _____

NET REVENUE \$ _____

NOTE: All event expenses must either be paid directly by the organizer or come out of the event proceeds. For help in budgeting your event, please see **Sample Event Budget Sheet** (page 19).

Name (please print): _____

Signature: _____ Date: _____



Third Party Fundraising Guidelines

Thank you for choosing the Alzheimer Society as a beneficiary of your third party event. These types of initiatives are key to our success and we recognize the effort it takes to organize and execute events and/or promotions.

To help your event or promotion run smoothly, we have created guidelines for fundraising held on behalf of the Alzheimer Society. We ask that you read these guidelines carefully before proceeding with your plan. Approval will be granted on per event/promotional basis. Applicants must reapply annually for approval.

If you have any questions, please contact Bojana Milanovic at bmilanovic@alzheimerontario.org or 416-640-6315.

The Society does **NOT permit the following types of fundraisers in a third party context:**

- × Programs that raise money on commission.
- × Events that do not comply with the Alzheimer Society mission and/or programmatic activities.
- × Events that involve the promotion or support of a political party or candidate, or those which appear to endorse a political activity.
- × Direct solicitation (including but not limited to door-to-door canvassing, telemarketing or internet).

What the Alzheimer Society requests of third party fundraisers:

- Please register new initiatives or update us on continuing events or promotions. It is important that our office is aware of all initiatives that are held in support of our programs.
- It is the organizer's responsibility to communicate to sponsors, participants and the general public that the Society is not conducting the event or promotion but is the beneficiary.

Guidelines:

- All publicity (including media releases, print/promotional materials, etc.) for the proposed event or promotion must be approved by the Society prior to being printed, released, etc.
- The Alzheimer Society name and logo may not be used by a third party on an ongoing basis (e.g. on a website or on promotional material), unless permission in writing has been granted to the third party by the Society.
- Mention of the Alzheimer Society in connection with the promotion and funds raised must be approved by the Alzheimer Society. Generally, the approved wording is "Proceeds from this

initiative will be donated to the Alzheimer Society.”

- The public should be informed how the Alzheimer Society will benefit from the event or promotion. If the Society will not receive all the proceeds, then the exact percentage that benefits the Society must be stated clearly on all related materials.
- The Alzheimer Society must be notified if other organizations will benefit from the event or promotion.
- The Third Party Organizer will obtain all necessary permits, licenses and insurance required.
- All funds and tax receipt information (if approved to issue receipts) i.e. contact information for receipting, must be received by the Society no later than 30 days after closing the event or promotion.
- It is recommended that the third party organizer make themselves familiar with the receipting policies of the Canada Revenue Agency (CRA):

<http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>

- If the event or promotion is cancelled, the Society must be given at least 24 hours notice. Please try to return to us all unused Alzheimer Society materials.
- The Society shall have the right at any time and for any reason to request that the Third Party Organizer cease use of the name of the Alzheimer Society in connection with the event or promotion and the Third Party Organizer must comply with such request.
- The Society will not assume any legal or financial liability at an event or in conjunction with a promotion.
- The Society is not responsible for any damage, accidents to persons or property at an event.

Top 25 Fundraising Event Ideas

If you're in need of some inspiration for your fundraising event, please check out our **Top 25 Fundraising Ideas**:

1. 'A-thons' (e.g. dance-a-thon, walk-a-thon, swim-a-thon, etc.)
2. Auction
3. Bake sale
4. BBQ / cook-off
5. Birthday celebrations
6. Bowling night
7. Car wash
8. Carnival
9. Comedy night
10. Craft sale
11. Dinner or gala
12. Fashion show
13. Fitness challenge
14. Game night
15. Garage sale / secondhand sale
16. Gift wrapping (especially during the holidays)
17. Golf tournament
18. Karaoke night
19. Movie night
20. Pancake breakfast
21. Poker tournament
22. Quiz night
23. Seasonal fundraising (e.g. Easter egg hunt, Christmas decorating contest, etc.)
24. Sporting event
25. Wedding

PLEASE NOTE: It's very important that you take the time to familiarize yourself with the policies and procedures of event fundraising as outlined in the **Third Party Waiver and Liability Release Agreement** (page 5). Should your event be serving alcoholic beverages, please ensure that safe drinking is practiced. A safe event will be an enjoyable event!

Remember to collect all pledge forms and donations and submit them to the Alzheimer Society no later than 30 days after you have hosted your event!

Tax Receipt Guidelines

- The Alzheimer Society is only permitted to issue tax receipts to individuals who make a donation without receiving a tangible item or benefit in return.
- The Alzheimer Society can only issue tax receipts for the amount of the actual donations received by the Society.
- Tax receipts cannot be issued for funds used to cover the costs of the event or other administrative expenses incurred by the Third Party Organizer.
- Tax receipts will be issued by the Society once net funds are remitted with a list of donor names, addresses and amounts of individual donations.

<http://www.cra-arc.gc.ca/chrts-gvng/chrts/prtng/rcpts/fndrsng-eng.html>

Sample Event Budget Sheet

You can use the following sample budget sheet to manage your event's income and expenses. For an Excel template file, please visit www.fundraise.alz.to.

| EVENT BUDGET SHEET | | | |
|---|---------------------------|---------------------------|------------------------|
| INCOME | | | |
| <i>Item (e.g. donations, ticket sales, etc.)</i> | <i>Estimated Quantity</i> | <i>Estimated Income</i> | <i>Actual Income</i> |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| TOTAL INCOME: | | | |
| EXPENSES | | | |
| <i>Item (e.g. venue rental, food, fees, etc.)</i> | <i>Estimated Quantity</i> | <i>Estimated Expenses</i> | <i>Actual Expenses</i> |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| TOTAL EXPENSES: | | | |
| NET INCOME (TOTAL INCOME - TOTAL EXPENSES): | | | |

Sample Letter of Support

The following is an example of a letter of support that we could write for you to validate the authenticity of your event:

RE: [NAME OF YOUR EVENT]

To Whom It May Concern,

This letter is to inform you that [THIRD PARTY ORGANIZER] will be holding a fundraising event, [NAME OF YOUR EVENT], on [EVENT DATE] at [EVENT LOCATION] to benefit the Alzheimer Society.

This fundraising event is being conducted with the approval of the Society. If you would like to support the event — whether through sponsorship, donating a gift in kind, etc. — that would be most kind.

It is our dream that no one will feel alone when facing Alzheimer's disease. Events such as these and contributions from people like you go a long way to helping us realize that dream.

If you have any questions or concerns, please do not hesitate to contact me at 416-640-6315. Thank you so much.

Kindest regards,

Bojana Milanovic
Special Events Manager
Alzheimer Society of Toronto

Event Planning Checklist

Event Planning Checklist: Before the Event

- [] Choose an event to host.
- [] Select a date for your event as well as a location that is appropriate for your estimated scale and venue requirements.
- [] Set your fundraising goal and determine a budget for your event (**Sample Budget Sheet** on page 21).
- [] Complete and submit the **Third Party Waiver and Liability Release Agreement** (page 5 or www.fundraise.alz.to).
- [] Complete and submit the **Application Form** (page 7 or www.fundraise.alz.to).
- [] Recruit volunteers, if needed.
- [] Find sponsors for your event to offset some of the costs you will incur. Begin your search with people you know, such as friends or family. If there is a coffee shop you often visit, ask them to support your event. See if employers will match the donations made by employees to your event.
- [] Create a timeline / workback schedule to keep your event organized and on track.
- [] Advertise your event! Spread the word through social media, newspapers and media stations to increase attendance and support of your event. Ensure that, prior to advertising, your materials and messages are consistent with and approved by the Alzheimer Society for distribution.
- [] Organize to have all necessary materials available to you at your event **at least one week in advance** of the event day.

Event Planning Checklist: During the Event

- [] Ensure that your volunteers have been clearly instructed on what their roles will be at your event.
- [] Assign someone to handle donations and to ensure donation pledge forms (page 23) are completed correctly.
- [] Display and distribute Alzheimer Society brochures for those attending the event (specify type and quantity in the **Application Form** on page 7 or www.fundraise.alz.to.)
- [] Have FUN!

Event Planning Checklist: After the Event

- [] Thank everyone who was involved in the event's execution (participants, volunteers, sponsors and donors).
- [] Collect all raised funds and pledge forms, and complete the **Financial Summary Form** (page 13) to be submitted to the Alzheimer Society ***no later than 30 days*** after your event.
- [] Consider hosting the event annually. The first year is always the hardest but you can use what you learned to improve and grow!

| Sponsor's Name (please print) | Address | City | Postal Code | Email | Telephone | Receipt? | Amount |
|-------------------------------|-----------------|-------------|-------------|-----------------------|--------------|----------|--------|
| Sam Sampleton | 123 Sample Ave. | Sampleville | A1B 2C3 | s.sampleton@email.com | 416-123-4567 | Y | \$20 |
| 1. | | | | | | | |
| 2. | | | | | | | |
| 3. | | | | | | | |
| 4. | | | | | | | |
| 5. | | | | | | | |
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| 11. | | | | | | | |
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| 18. | | | | | | | |
| 19. | | | | | | | |
| 20. | | | | | | | |

Thank you for your generous support!



Alzheimer Society
TORONTO

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