

Société Alzheimer Society

M O N T R É A L

THIRD-PARTY FUNDRAISING GUIDE



Alzheimer Society of Montreal

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Charitable registration number: 10798 7448 RR001

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From the Executive Director



Thank you for being a partner in our mission to alleviate the consequences of Alzheimer's disease and related disorders! We are grateful that you have chosen to organize a fundraising event in support of the Alzheimer Society of Montreal.

One of our goals here at the Society is to develop an engaged community of people committed to our mission. As you may know, 33,000 Montrealers have Alzheimer's disease or a related disorder, and this number is growing, fast.

Now, more than ever, we need the support of dedicated fundraisers like you so that we can continue to offer important services to people affected by the disease.

The Alzheimer Society of Montreal benefits from third-party fundraisers by:

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

This guide provides information on the Alzheimer Society of Montreal, its mission and programs, as well as the policies and procedures for organizing a third-party fundraiser. Please read through it carefully and do not hesitate to contact us if you have any questions.

On behalf of the Society, its Board of Directors and staff, I would once again like to thank you for your support and I wish you great success in organizing your event.

Camille N. Isaacs-Morell
Executive Director

The Alzheimer Society of Montreal

About us

The Alzheimer Society of Montreal (ASM) is a not-for-profit organization committed to providing innovative, high-quality and timely support services that have been carefully integrated to meet the unique needs of people touched by Alzheimer's disease or related disorders, including families, caregivers and other stakeholders in the Greater Montreal region.

Our mission

To alleviate the social and personal consequences of Alzheimer's disease and related disorders through the development and delivery of leading-edge intervention, care and support services in Montreal.

Our vision

To be a model of excellence for the education, care and support of people living with Alzheimer's disease or related dementia as well as their caregivers, families and healthcare professionals.

Our values

Competency: Focus on the delivery of evidence-based modes of care and superior programs and services that are effective and appropriate for their intended recipients.

Integrity: We are accountable to our members, funding organizations and donors, and are focused on honesty, reliability and responsibility in everything we do.

Collaboration: We establish and advocate partnerships and collaboration among staff and volunteers, community and government, businesses and professionals to ensure a responsive and coordinated range of services to meet the needs of the people we serve.

Respect: We treat everyone we serve with dignity, empathy, and compassion. We respect their right to decide how they will navigate the Alzheimer's journey.

Accessibility: We strive to make our services available to all individuals and caregivers who seek our help.

What you should know about dementia

Dementia is an overall term for a set of symptoms that are caused by disorders affecting the brain. Symptoms may include memory loss and difficulties with thinking, problem-solving or language, severe enough to reduce a person's ability to perform everyday activities. A person with dementia may also experience changes in mood or behaviour. Dementia is progressive, which means the symptoms will gradually get worse as more brain cells become damaged and eventually die.

Dementia is not a specific disease. Many diseases can cause dementia, including Alzheimer's disease, vascular dementia (due to strokes), Lewy Body disease, head trauma, fronto-temporal dementia, Creutzfeldt-Jakob disease, Parkinson's disease, and Huntington's disease. These conditions can have similar and overlapping symptoms.

5%

The percentage of the Canadian Institutes of Health Research's budget invested in dementia research

45%

The greater your risk of developing dementia if you smoke

65%

Of those diagnosed with dementia over the age of 65 are women

16,000

The number of Canadians under the age of 65 living with dementia

25,000

The number of new cases of dementia diagnosed every year

56,000

The number of Canadians with dementia being cared for in hospitals even though this is not an ideal location for care

564,000

Canadians are currently living with dementia

937,000

The number of Canadians who will be living with the disease in 15 years

1.1 million

The number of Canadians affected directly or indirectly by the disease

\$10.4 billion

The annual cost to Canadians to care for those living with dementia

Third-Party Fundraisers

What is a third-party fundraiser?

A third-party fundraiser can be defined as any fundraising initiative brought forward by an individual, community group, service club, or business, external to the Alzheimer Society of Montreal, who wish(es) to raise money through a planned activity that is designed, managed and financially resourced by the external participants (the host). Examples include, but are not limited to: an employee “dress down” day, a knitting marathon, a sports tournament, a banquet, a silent auction, or a gala.

Why should I organize a third-party fundraiser to support the Alzheimer Society of Montreal?

On the island of Montreal, 33,000 people currently live with Alzheimer’s disease or a related disorder and in less than 15 years, the number of people affected will increase to approximately 50,000. The need for the Society’s services increases as the number of people affected by Alzheimer’s continues to rise. Now, more than ever, we need your support. By becoming an Alzheimer Society of Montreal third-party fundraiser, you are helping us to build an engaged community committed to alleviating the consequences of Alzheimer’s for Montrealers living with the disease as well as their caregivers. With your help, we will be better equipped to cope with the soaring increase in the need for our services.



How will I make a difference for Montrealers living with Alzheimer's disease and their caregivers?

\$10,000

- Would allow the Alzheimer Society of Montreal to add a part-time intake counsellor to the team, in order to respond to the growing number of families reaching out for support and being referred by the healthcare and community sectors.

\$7,500

- Would allow the Alzheimer Society of Montreal to expand and offer stimulation and socialization programs for people with early stage dementia in parts of Montreal where no programs currently exist: East End, West Island, and Montreal North.

\$5,000

- Would enable fifty people with Alzheimer's disease to attend our social group on Mondays for eight months. Every Monday afternoon, participants benefit from a variety of **therapeutic activities** offered by specialists at our premises. Participants share in discussions, participate in physical activities, and stimulate their brains with cognitive exercises and other creative activities. Examples include: yoga, pet therapy and music therapy.

\$2,500

- Would enable twenty-five people with Alzheimer's disease to attend our art therapy workshops for eight months. Through art therapy workshops, people with Alzheimer's disease or a related form of dementia have the opportunity to express themselves, socialize with others and improve their quality of life.

\$1,000

- Would equip the Society to give up to 50 awareness talks throughout Montreal. These talks break the stigma of Alzheimer's disease and promote early diagnosis and intervention.

\$500

- Would provide an 8-week information and support group to 10-12 caregivers. These groups give caregivers a crash-course to better understand their family member's diagnosis. They help them develop strategies to best accompany them while also taking care of their own needs.

These are some examples that go to show that the money raised at your fundraiser will go a **long way** in helping Montrealers affected by Alzheimer's disease and related disorders. **All fundraisers help us to achieve our mission.**

Organizing a Third-Party Fundraiser

Steps to organizing a third-party fundraiser

- 1) Fill out the “Third-Party Fundraiser Proposal Form” at the end of this document and send it to info@alzheimermontreal.ca
- 2) Once the Alzheimer Society of Montreal has received the form, the Coordinator of Partnership Development will contact you to schedule an in-person meeting to discuss your idea(s). An in-person meeting is preferred, but if you are unable to attend in-person, the meeting will take place over the phone.
- 3) If your activity is approved, the Coordinator of Partnership Development will provide you with a signed “Third-Party Fundraiser Approval Form” by email. You can expect a wait period of approximately 10 to 14 business days, after the proposal was submitted, to receive the approval form.
- 4) Start organizing your fundraiser.

Important questions to ask yourself when organizing a fundraising activity:

- 1) Will I need to recruit volunteers?
- 2) Will I need to obtain special permits from authorities: the municipality, the borough and/or the Régie des alcools, des courses et des jeux du Québec?
- 3) What is my fundraising goal?
- 4) What is my budget?
- 5) Where will my fundraiser take place?
- 6) Does my fundraiser respect the mission, vision, and values of the Alzheimer Society of Montreal?
- 7) How will I promote my activity and/or sell tickets (if applicable)?
- 8) Do I want the Alzheimer Society of Montreal to issue tax receipts to people who participate in/donate to my fundraiser?
- 9) Do I want a representative from the Alzheimer Society of Montreal to attend my fundraiser?
- 10) Do I need to purchase insurance for my event? **Please note that the Society’s insurance does not cover third-party fundraisers.*

For more information, please see our third-party fundraiser toolkit (hyperlink coming soon).

Using the Alzheimer Society of Montreal's Logo and describing the organization

Please use the following texts to describe the Alzheimer Society of Montreal:

The Alzheimer Society of Montreal is committed to alleviating the social and personal consequences of Alzheimer's disease and related disorders, as well as promoting research into their causes and cure.

Each year, the Alzheimer Society of Montreal serves nearly 1,700 persons affected, caregivers and organizations through various programs and services, at over 15 service points on the island of Montreal, including:

- **Support** – activities for people living with dementia, counselling, information, intake and referrals, support Groups
- **Education** – Conferences, core training for healthcare professionals, Alzheimer Cafés
- **Respite and stimulation** – in-home services, activity centres, art therapy

The Wordmark Logo:

As a third-party event organizer for the Alzheimer Society of Montreal, you are welcome to use the Alzheimer Society of **Montreal** logo on your promotional material as long as it is approved by the Society beforehand.

If you choose to use our logo, please ensure the **Montréal** location identifier is included.



Note: All promotional material that contains our logo and/or descriptions of our organization has to first be approved by Alexandra Louridas, Coordinator – Partnership Development, before it can be used and/or distributed.

How not to use the wordmark

Do not:

- Position the wordmark against a patterned background
- Overprint the wordmark with text
- Use any colours other than the approved Alzheimer blue
- Distort the wordmark by changing the height to width ratio
- Substitute type fonts within the wordmark
- Drop the wordmark into text
- Combine the wordmark and symbol (Forget Me Not) into a single graphic unit

The Forget Me Not Symbol:

The Forget Me Not symbol is a registered Trademark of the Alzheimer Society.

The symbol represents memory loss, a key symptom of Alzheimer's disease and includes:

- Visual depiction of the flower
- Words Forget Me Not/Ne m'oubliez pas

The three flowers represent

- The person with dementia
- The caregiver
- The Society



How not to use the Forget Me Not symbol

Do not:

- Use the symbol as a pattern
- Use any colours other than the approved Alzheimer blue
- Use the symbol alone without the wordmark
- Change or distort the height to width ratio of the symbol
- Substitute type fonts within the symbol
- Use the symbol as a character or bullet point
- Combine the wordmark and symbol into a single graphic unit
- Use the symbol alone on a joint venture project
- Use elements such as a single flower from the complete symbol
- Use hyphens between the words Forget Me Not
- Change the size of the symbol to anything smaller than 19 mm in diameter.

After your fundraiser

The Alzheimer Society of Montreal asks that you submit the following within 30 days of your fundraiser:

- 1) All donations (including cash, checks, and donation forms for donations by credit card)
- 2) A tax receipt document, which outlines how the amounts eligible tax receipts were calculated
- 3) A documented list of revenues and expenses

Calculating amounts for income tax receipt purposes

At the Alzheimer Society of Montreal, we understand that the process of calculating the amount eligible for income tax receipts can be complex. If you anticipate that your fundraiser will require tax receipts, please contact the Finance and Development team at pbourassa@alzheimermontreal.ca or 514-369-0800 extension 1201 **prior to your fundraiser** for guidelines on how to calculate these amounts accurately. Do not promise your fundraiser participants that a tax receipt will be issued until you have confirmation from the Society. Click here to see an example of how to document receiptable donations. Click here for a template that can be used to document your donations (hyperlink coming soon).

**Note: Tax receipts are only given for monetary donations in the amount equal to, or greater than, \$10.*

Auctions: If you are planning on hosting an auction at your fundraiser, and would like to know if tax receipts can be issued, please contact the Finance and Development team at pbourassa@alzheimermontreal.ca or 514-369-0800 extension 1201 **prior to your fundraiser**. Do not promise your fundraiser participants that a tax receipt will be issued until you have confirmation from the Society.

Documenting Revenues and Expenses

In order to ensure that all issued tax receipts are calculated accurately, the Alzheimer Society of Montreal asks that a documented list of revenues and expenses are submitted along with the tax receipt document. Please provide copies of receipts for expenses that exceed \$500. Click here to see an example of how to document revenues and expenses (hyperlink coming soon).

Third-Party Fundraiser Proposal Form

Main Organizer/Contact Person

First name _____ Last name _____

Address : _____

City : _____ Province: _____

Cell phone : _____ Home phone: _____

Work phone (if applicable): _____

Email address : _____

Please describe why you are interested in organizing a fundraiser for the Alzheimer Society of Montreal:

I am organizing a fundraiser:

- As an individual
- With a group of people (list your fellow organizers' contact information below):

Mr./Ms./Mrs.	First name	Last name	Address	City	Province	Telephone	Email

- On behalf of an Organization or Association (please specify name here)

- As an event planner hired by a client to organize a fundraising event (please specify the name of your client(s))

- As a manager representing a client who wishes to organize a fundraising event (please specify the name of your client(s))

Your Fundraiser

Name/Title/Description	
Date, time, duration	
Location	
Location Address	
Name of location contact person	
Contact person Email	
Telephone #	

I would like documentation on Alzheimer's disease as well as programs and services for my event

Your Prospective Sponsors

1	
2	
3	
4	
5	
6	
7	

Your Estimated Budget

Please provide a detailed breakdown of projected income and expenditures for your proposed fundraiser

Projected Revenues (Gross)

DESCRIPTION	AMOUNT \$
TOTAL GROSS INCOME	

Projected Expenditures

DESCRIPTION	AMOUNT \$
TOTAL EXPENDITURES	
ANTICIPATED NET INCOME (Gross income – expenditures)	

Partnering with the Alzheimer Society of Montreal

Please read the following policies and procedures:

- 1) The Society reserves the right to refuse any fundraiser that does not respect its mission, values, or goals.
- 2) A third-party fundraiser organized to benefit the Society cannot be held without prior written authorization
- 3) All material that contains descriptions of, and/or logos belonging to, the Alzheimer Society of Montreal, must be pre-approved by the [Coordinator of Partnership Development](mailto:alouridas@alzheimermontreal.ca) alouridas@alzheimermontreal.ca. This includes, but is not limited to: advertising, letters, brochures, flyers and press releases. (Please see below for regulations for using the Society's logo).
- 4) Documents and materials must be submitted sufficiently in advance for the review and approval process to be completed. One week is generally enough in most cases, but more time may be needed for events with more elaborate plans or special requests.
- 5) Obtaining all necessary permits is the sole responsibility of the person hosting the fundraiser, not the Alzheimer Society of Montreal.
- 6) All donations raised in connection with the fundraiser must be remitted within 30 days of the event to the Alzheimer Society of Montreal, along with a list of all the donors showing their first name, family name, full mailing address, one or more phone numbers and/or e-mail addresses. ***Note: Tax receipts are only given for monetary donations in the amount equal to, or greater than, \$10**
- 7) Your fundraiser is independent of the Alzheimer Society of Montreal. As such, an individual, group, or third-party organizer is not authorized to act as representative of the Society.
- 8) The Alzheimer Society of Montreal cannot sell tickets for my fundraiser, but can provide a link to the ticket platform, and/or promote the event on the following platforms: Facebook, website, newsletter
- 9) The Alzheimer Society of Montreal does not encourage or condone door-to-door or pyramid-style sales, or fundraising specifically for an individual. Moreover, it does not advance funds towards the costs of third-party fundraisers.
- 10) The fundraiser organizing committee and/or organizer will not hold the Society liable in any way whatsoever.
- 11) No claim can be made against the Society for expenses incurred as part of, or arising from, the fundraiser.
- 12) The Society will not be held responsible for any financial loss or for any commitments taken by the fundraiser organizer(s).
- 13) Please fill out the "Third-Party Fundraiser Proposal Form" at the end of this document and return it at least 2 months (8 weeks) before the anticipated activity. ***Note: If your fundraiser requires special permits or extensive planning, you will likely need to send in the form earlier than the required 2 months.**
- 14) The Society is not a sponsor of the fundraiser.

...continued

By signing this document, I acknowledge that I have read and I understand the above policies and procedures regarding organizing a fundraiser for the Alzheimer Society of Montreal and agree to comply with all provisions in organizing and holding our fundraising event. I further attest that the information provided on this form is correct and accurately describes the proposed event. Until written permission is received, contributions will not be solicited, and the name "Alzheimer Society of Montreal" will not be used for any purpose.

Name of Contact Person: _____

Signature: _____

Date: _____

Société Alzheimer Society

M O N T R É A L

Formulaire d'approbation pour des événements tiers/Third-Party Fundraiser Approval Form
À remplir par la Société Alzheimer de Montréal/to be completed by the Alzheimer Society of Montreal

J'approuve par la présente l'événement tiers proposé _____ (nom d'événement) _____
organisé par _____ (nom de la personne-ressource) _____ le _____ (date) _____ au profit de la
Société Alzheimer de Montréal.

Nom: _____

Fonction: _____

Date : _____

Signature : _____

I hereby approve of the proposed third party fundraiser _____ (event name) _____
organized by _____ (contact person name) _____ on _____ (date) _____ in support of the
Alzheimer Society of Montreal.

Name: _____

Title: _____

Date: _____

Signature: _____



Forget Me Not

The symbol of the Alzheimer Society is the Forget-Me-Not flower. It reminds us not to forget people living with the disease – those who have been diagnosed and those who care for them.

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– November 2018 –