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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

Proceeding	91245121
Party	Plaintiff Alzheimer's Disease and Related Disorders Association
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Date	08/24/2020
Attachments	Wendy Vizek NOTICE OF FILING EXHIBITS T-AA.pdf(361075 bytes) EXHIBIT T - Part 1- annual-report-2019.pdf(4034396 bytes) EXHIBIT T - Part 2- annual-report-2019.pdf(3320276 bytes) EXHIBIT T - Part 3- annual-report-2019.pdf(3558381 bytes) EXHIBIT T - Part 4- annual-report-2019.pdf(4500187 bytes) EXHIBIT U - Corporate Philanthropy Report.pdf(96077 bytes) EXHIBIT V - P2P2016.pdf(487285 bytes) EXHIBIT W - P2P30-2017-RELEASE-2.25.18.pdf(94516 bytes) EXHIBIT X - P2P_Top_30_2018_Quick_Reference_Guide.pdf(875439 bytes) EXHIBIT Y - P2P2019.pdf(2540882 bytes) EXHIBIT AA - AA000270-000271.pdf(117213 bytes)

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD**

Alzheimer's Disease and Related
Disorders Association, Inc.

Opposer,

v.

Alzheimer's New Jersey, Inc.

Applicant.

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Opposition No. 91245121

**OPPOSER'S NOTICE OF FILING OF EXHIBITS T-AA IN
SUPPORT OF TRIAL TESTIMONY OF WENDY F. VIZEK**

PLEASE TAKE NOTICE that pursuant to 37 C.F.R. §§ 2.123(a)(1) and 2.125(a), Opposer, Alzheimer's Disease and Related Disorders Association, Inc. are filing Exhibits T-AA of the trial testimony of Wendy F. Vizek via her filed Declaration, executed on August 21, 2020.

Dated: August 24, 2020

Respectfully submitted,

/Shima S. Roy
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Assoc., Inc.*

PROOF OF SERVICE

I hereby certify that a true and complete copy of the foregoing Exhibits T-AA In Support of Wendy Vizek's Trial Testimony have been served on Lisa D. Taylor at:

Ingelsino, Webster, Wyciskala & Taylor
60 Parsippany Road, Suite 204
Parsippany, New Jersey 07054

by forwarding said copy on August 24, 2020 by email to: ltaylor@iwt-law.com and ltaylor@iwwt.law.

Dated: August 24, 2020

/Shima Roy/
Shima S. Roy

Exhibit T

ALZHEIMER'S ASSOCIATION ANNUAL REPORT

FISCAL YEAR 2019
(JULY 1, 2018 – JUNE 30, 2019)

alzheimer's  association®



Alzheimer's Association

225 N. Michigan Ave., Fl.17

Chicago, IL 60601

alz.org[®]

800.272.3900

The Alzheimer's Association is the leading voluntary health organization in Alzheimer's disease care, support and research. We provide services to those affected by Alzheimer's, advocate for policy change and scientific funding, and advance research toward prevention, treatment and, ultimately, a cure.

A donor-supported organization, the Alzheimer's Association allocates its funds in an ethical and responsible manner that exceeds the rigorous standards of America's most experienced charity evaluator, the Better Business Bureau Wise Giving Alliance. The Association also holds a National Charity Seal from the Alliance.

We are especially grateful to those who helped us advance our mission in fiscal year 2019 by making contributions. Total revenues equaled more than \$393 million.

Our mission

To eliminate Alzheimer's disease through the advancement of research; to provide and enhance care and support for all affected; and to reduce the risk of dementia through the promotion of brain health.

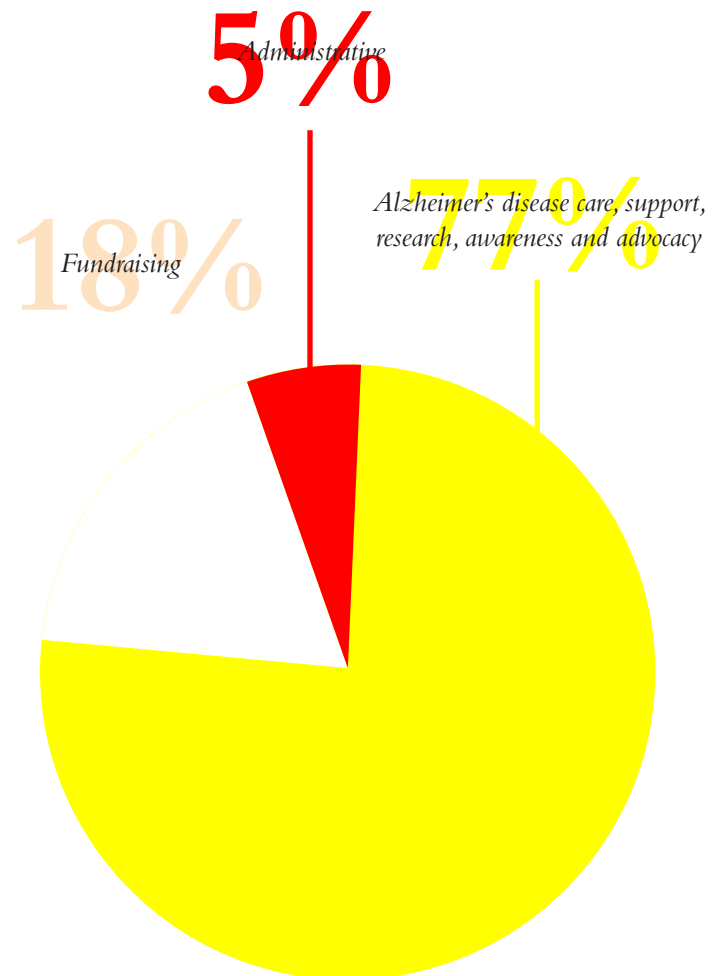
Our vision

is a world without Alzheimer's disease[®].

Join our cause

[Learn how you can get involved.](#)

Use of organization funds during fiscal year 2019





Letter from the Association President and CEO and the Chair of the Governing Board

Together with our vast network of supporters and volunteers, the Alzheimer's Association launched new initiatives and forged strategic partnerships across all mission pillars in fiscal year 2019, resulting in significant progress, unparalleled achievements and increased momentum toward our vision of a world without Alzheimer's disease. But we know we need to do still more.

As the number of people living with Alzheimer's and other dementias continues to climb, the Association remains deeply committed to vital care and support for all those affected. During FY19, the Association **delivered on its mission to provide care and support more than 9.1 million times** through channels including alz.org, phone and in-person care consultation, support groups, education programs and information.

To help ensure that those facing Alzheimer's receive a timely and accurate diagnosis as well as high-quality care, the Association convened and led a workgroup that **issued comprehensive Clinical Practice Guidelines** for physicians and nurse practitioners. We also convened experts from across the country in a Dementia Care Provider Roundtable, with the goal of implementing those Alzheimer's Association 2018 Dementia Care Practice Recommendations.

We took innovative steps with the formation of a **Health Systems Engagement Strategy** aimed at creating partnerships with health systems, physicians and other health care professionals. Our Health Systems Workgroup developed a strategic framework to lead the initiative's launch next year.

To accelerate the pace of Alzheimer's research worldwide, **the Association made its largest-ever research investment** in FY19, granting more than \$42 million to 162 scientific investigations. This brings the Association's current commitment to \$167 million in more than 500 projects in 27 countries.

The Association-led **U.S. Study to Protect Brain Health Through Lifestyle Intervention to Reduce Risk (U.S. POINTER)** continued to progress, as study investigators, connected with nearly 40 potential groups across the country and identified four sites to continue this critical two-year trial to evaluate whether lifestyle interventions that simultaneously target many risk factors protect cognitive function in older adults who are at increased risk for cognitive decline.

Groundbreaking results of the SPRINT MIND study were presented at the Alzheimer's Association International Conference® 2018 (AAIC®) in Chicago demonstrating that lowering blood pressure can significantly reduce the occurrence of mild cognitive impairment. In light of this promising news, the Association **awarded more than \$800,000 to support the SPRINT MIND 2.0 Study**, which will further investigate the impact of intensive blood pressure treatment on reducing dementia risk.

Early detection continued to be a crucial focus in FY19. Our annual *Alzheimer's Disease Facts and Figures* report conveyed the latest statistics on the impact of Alzheimer's and other dementias across the nation, and included a special report on the benefits of brief cognitive assessments in the primary care setting. We provided tools for families to talk about the signs of cognitive decline during Alzheimer's & Brain Awareness Month in June and **released "Our Stories," a campaign developed in partnership with the Ad Council**, sharing the experiences of real individuals who initiated these difficult conversations.

We also **launched the "United" campaign** in June during the first 2020 Democratic presidential debate. Using the messaging "red + blue = purple," this campaign aims to unite both sides of the political divide to fight Alzheimer's and advance the cause, with the goal of ending the disease.

We took exciting steps to increase Alzheimer's awareness with the launch of **ALZ magazine**, our free national publication. Featuring information and tips on how to lead a brain-healthy lifestyle, *ALZ* will educate and inspire a wide audience as its circulation continues to grow.

With diverse populations disproportionately impacted by Alzheimer's, **outreach to these communities is integral** to our mission. Reynick Martinez joined the Association in the new role of Chief Diversity & Inclusion Officer, leading initiatives to strengthen the Association's outreach to all populations, build meaningful partnerships and engage priority audiences. To move toward these goals, the Association maintained and initiated relationships with key organizations including Advocacy and Services for LGBT Elders (SAGE), the Mexican Consulate and the African Methodist Episcopal (AME) Church.

The Association, the Alzheimer's Impact Movement (AIM) — a separately incorporated advocacy affiliate of the Alzheimer's Association — and our nationwide network of advocates continued to work relentlessly to ensure that we change the trajectory of this disease. In FY19, Congress approved **a historic \$425 million increase for Alzheimer's and dementia research funding** at the National Institutes of Health, bringing federal annual research spending on Alzheimer's and other dementias to \$2.4 billion.

The Association and AIM celebrated the passage of the **Building Our Largest Dementia (BOLD) Infrastructure for Alzheimer's Act**, which will create a nationwide infrastructure to improve public health and implement effective Alzheimer's interventions. At the urging of our advocates, the **Palliative Care and Hospice Education and Training Act (PCHETA)** was also passed by the House. This legislation would ensure an adequate, well-trained palliative care workforce to address the nation's caregiving needs.

We are very grateful to the generous volunteers, donors and partners who make our achievements possible. In FY19, **revenue totaled \$393 million**. Our signature events had a banner year raising funds and awareness for the cause, with Walk to End Alzheimer's® generating a record \$97 million and The Longest Day® growing in revenue raised by 21%. Due to the success of these events, the Association was named the "Fundraising Organization of the Year" by the Peer-to-Peer Professional Forum.

Companies, individuals and families played a key role in this year's fundraising achievements. **Edward Jones** deepened its commitment to the cause as National Presenting Sponsor of the Walk to End Alzheimer's, with a total contribution of more than \$6 million. Hosted by founder Michaela "Mikey" Hoag, the **Part the Cloud Luncheon** raised \$1 million for translational Alzheimer's research aimed at slowing, stopping or ultimately curing the disease.

Our significant accomplishments and progress in FY19 have set the pace for our work in the future. With the help of our ever-expanding base of dedicated volunteers, donors and supporters, we will continue to build on our advances while remaining relentless in our pursuit to end Alzheimer's and all dementia.

Sincerely,



Harry Johns
President and CEO



Dave Goltermann
Chair, Governing Board

Report Overview

The FY19 Annual Report details mission-related accomplishments within the six strategic objectives of the Alzheimer's Association: providing and enhancing care and support; accelerating research; increasing concern and awareness; strengthening diversity and inclusion; advancing public policy; and increasing revenue. These initiatives drive the Association's efforts to eliminate Alzheimer's and offer help and hope to all those affected by the disease.

Providing and Enhancing Care and Support

The Association is instrumental in providing and enhancing care and support for all those affected by Alzheimer's and other dementias. Through our commitment to reliable resources, support and information, we are available 24 hours a day, seven days a week, 365 days a year via our locations nationwide and our award-winning website and Helpline.

Accelerating Research

The world's largest nonprofit funder of Alzheimer's research, the Association is also the nonprofit with the highest impact in Alzheimer's research worldwide, behind only the U.S. and Chinese governments as measured by InCites Clarivate™. In our role as the leading research convener, collaborator and coordinator, the Association is committed to accelerating global progress of new treatments, preventions and, ultimately, a cure

Increasing Concern and Awareness

The Association drives the nationwide discussion of Alzheimer's and other dementias and establishes the organization as the leader in the fight to end devastation from dementia. By growing the conversation about the number of affected individuals, and the staggering economic and societal impact of Alzheimer's, the public and policymakers are enabled to take appropriate actions to change the course of the disease, and families can be empowered to raise their voices as they face its challenges.

Strengthening Diversity and Inclusion

The Association has long highlighted diversity and inclusion as core values critically important to our work. As the American population ages and becomes increasingly more diverse, the Association is committed to identifying and addressing barriers that may impede members of diverse communities from receiving Alzheimer's education and care and support resources, and to ensuring that all people are included in the fight against the disease.

Advancing Public Policy

The leading voice for Alzheimer's advocacy, the Association and the Alzheimer's Impact Movement, our separately incorporated advocacy affiliate, successfully fight for critical research and care and support initiatives at the state and federal levels. In tandem with hundreds of thousands of advocates, we are relentless in our efforts to make Alzheimer's a national priority while speaking up for the needs and rights of people living with the disease.

Increasing Revenue

Individuals, corporations and foundations further the Association's mission through their dedicated involvement and support. From Walk to End Alzheimer's to fundraising galas to estate gifts and more, the Association deeply appreciates our many generous donors who demonstrate their powerful, ongoing commitment to ending Alzheimer's through advancing research and enhancing the Association's care and support efforts.

Exhibit T

Part 2



Providing and Enhancing Care and Support

During FY19, the Association delivered on its mission to provide care and support more than 9.1 million times through channels including alz.org, phone and in-person care consultation, support groups, education programs and information. According to surveys, constituents are highly satisfied with Association programs and services and would recommend them to others.

The Association's national **24/7 Helpline**, staffed by specialists and master's-level clinicians, delivers care and support around the clock, 365 days a year. In FY19, this free service received nearly 300,000 calls, offering confidential support and information to people facing Alzheimer's and other dementias. In addition, the Association delivers the service on comprehensive nationwide Helpline standards developed to ensure consistent quality. The 24/7 Helpline is partially funded by a five-year, \$6.2 million federal grant awarded by the Department of Health and Human Services Administration for Community Living.

Responding to the urgent need for more timely and accurate Alzheimer's disease diagnosis and improvement in patient care, the Association convened and led a workgroup that issued **Clinical Practice Guidelines** for physicians and nurse practitioners. Published in *The Gerontologist*, the 20 recommendations range from enhancing efforts to recognize and more effectively evaluate symptoms to compassionately communicating with and supporting affected individuals and their caregivers.

The new Alzheimer's Association **Dementia Care Provider Roundtable** convened leaders, researchers and direct care providers from across the country to advance care and support services for people with Alzheimer's and other dementias and their caregivers. One of the roundtable's primary objectives was facilitating the implementation of the Alzheimer's Association 2018 Dementia Care Practice Recommendations, a set of guidelines that define quality care practices based on a comprehensive review of current evidence, best practice and expert opinion.

Referrals from health care professionals to the Association increased by 36% nationwide, thanks to strategic physician outreach efforts. The Association's

new **Health Systems Engagement Strategy** aims to increase access to timely diagnosis and high-quality dementia care through partnerships with health systems, physicians and other health care professionals. The Health Systems Workgroup developed a strategic framework for the initiative's launch next year.

Project ECHO® (Extension for Community Healthcare Outcomes) is a telementoring program that uses videoconferencing to train care providers and accelerate the sharing of knowledge across the care field. The Association **launched two Project ECHO pilot programs** in FY19. The first program focused on helping primary care practices increase timely diagnoses of Alzheimer's and dementia, while the second helped assisted-living communities adopt the Association's Dementia Care Practice Recommendations. Both programs showed high engagement and satisfaction, and participants reported having gained increased skills and confidence in providing dementia care.

Primary care participants described improvements in providing dementia care generally, with specific mentions in areas relating to screening for cognitive impairment, medication management, and communication with patients and families. Similar gains were reported in the Assisted Living Communities pilot; nearly all participants reported increased confidence, several a sense of reduced isolation in their roles and some shared early developments in institutional change already taking place as a result of their participation in the ECHO program.

Individuals living in the early stage of Alzheimer's and other dementias and their care partners comprise the Alzheimer's Association **National Early-Stage Advisory Group**. Advisors are dedicated to sharing their experiences in order to raise awareness, reduce stigma and provide guidance on the development of

programs and services. To enhance the Association's care and support efforts, advisors participated in the Association's Project ECHO pilot program, filmed videos for updated education programs and were featured in a national campaign created in partnership with the Ad Council.

In collaboration with AARP, the Association released the **Alzheimer's Association & AARP Community Resource Finder**, an enhanced database of dementia and aging-related resources. The Community Resource Finder makes it easy for people living with Alzheimer's and other dementias, caregivers and those involved in making care-related decisions to find local programs and services.

In order to provide education to all those affected by Alzheimer's and dementia, the Association created new in-person and online education programs in FY19. ***Understanding Alzheimer's and Dementia***, includes comprehensive information about Alzheimer's and dementia, as well as interactive material and videos with experts, individuals living with the disease and care partners. ***10 Warning Signs of Alzheimer's Disease***, describes common warning signs and symptoms of Alzheimer's, as well as tips to approach someone who is experiencing memory changes, the benefit of early detection and diagnosis, and more.

The Association continues to optimize its online resources for individuals affected by dementia. **ALZConnected®**, a free online community for people living with dementia and their caregivers, continues to thrive, with 11,443 new members, nearly 50,000 forum posts by community members and over 800,000 user sessions. **Alzheimer's Navigator®**, an online assessment tool allowing people with the disease and caregivers to create personalized action plans, had over 66,000 user sessions in FY19.

The Department of Health and Human Services Administration for Community Living awarded the Association a three-year, \$750,000 grant for a new financial literacy program. The caregiver education program ***Strengthening the Financial Literacy and Preparedness of Family Caregivers*** will help dementia caregivers ensure their own financial well-being and better equip them to handle financial tasks as a caregiver.

Exhibit T - Part 3

alzheimer's association

AAIC 18



alzheimer's association

AAIC 18

Accelerating Research

*In aggressive pursuit of its vision of a world without Alzheimer's, the Association made its largest-ever research investment in FY19, granting more than \$42 million to 162 new scientific investigations. Investments included awards to 139 projects funded through the **International Research Grant Program**, representing proposals ranked highest by a peer-reviewed process in a highly competitive field of 519 applications submitted from 1,084 letters of intent. As the world's leading nonprofit funder of Alzheimer's and dementia research, the Association is currently investing \$167 million in more than 500 active best-of-field projects in 27 countries.*

As part of the International Research Grant Program, the **Alzheimer's Association Zenith Fellows Awards** are among the world's most prestigious dementia research grants and are presented annually to investigators who have contributed significantly to the field of Alzheimer's research or a related area. The awards are made possible by members of the Alzheimer's Association Zenith Society, whose philanthropic gifts have funded over \$40 million granted to more than 125 leading scientists. FY19 awardees were Dr. Joanna Jankowsky, Baylor College of Medicine; Dr. Claudio Soto, University of Texas Health Science Center; and Dr. Jeffery Vance, University of Miami.

Demonstrating its commitment to developing the next generation of brain health leaders, the Association, in partnership with the Global Brain Health Institute (GBHI) and Alzheimer's Society (UK), developed the **Pilot Awards for Global Brain Health Leaders** program. Twenty-two pilot projects were each awarded approximately \$25,000 as part of the International Research Grant Program.

The **Association-led U.S. Study to Protect Brain Health Through Lifestyle Intervention to Reduce Risk (U.S. POINTER)** is a first-of-its-kind, \$35 million, two-year clinical trial to evaluate whether lifestyle interventions that simultaneously target many risk factors can reduce risk of cognitive decline in older adults. In FY19, the Association selected four U.S. POINTER sites in North Carolina, Northern California, the Chicagoland area and Houston and is actively recruiting for a fifth site.

The **Alzheimer's Association International Conference (AAIC)** is the premier annual forum for the presentation and discussion of Alzheimer's

and dementia research. A record number of nearly 6,000 leading researchers, clinicians, investigators and care providers from 68 countries attended AAIC 2018 in Chicago. During the conference, researchers announced results from the SPRINT MIND study — the first randomized, placebo-controlled clinical trial to demonstrate that lowering blood pressure can significantly reduce the occurrence of mild cognitive impairment (MCI). The Association **later awarded more than \$800,000 to support an extension study, SPRINT MIND 2.0**, which will further investigate the impact of intensive blood pressure treatment on reducing dementia risk.

AAIC Satellite Symposia convene researchers worldwide to facilitate fruitful collaborations and breakthroughs in Alzheimer's research. The Association held two satellite symposia in FY19. The Dec. 18-19, 2018, meeting in Bengaluru, India, drew more than 350 registered researchers, clinicians and students from 17 countries. Scientists learned about dementia-related genetics research in India, improvements in diagnosing and assessing individuals with cognitive decline, and the prevalence of Alzheimer's and dementia across the country. On April 10-12, 2019, in Sao Paulo, Brazil, more than 580 registered researchers, clinicians and health professionals from 29 countries heard the latest scientific developments, challenges and opportunities in Latin America.

Results from the **Imaging Dementia-Evidence for Amyloid Scanning (IDEAS) study**, published in *JAMA, the Journal of the American Medical Association*, found that amyloid positron emission tomography (PET) brain imaging that detects Alzheimer's-related plaques significantly influenced clinical management of people living with mild cognitive impairment and

dementia. The results presented highly credible evidence that amyloid PET imaging can be a powerful tool to improve the accuracy of Alzheimer's diagnosis. Led by Association Chief Science Officer Dr. Maria Carrillo, IDEAS is a multicenter study of more than 18,000 Medicare beneficiaries.

The Longitudinal Early-Onset Alzheimer's Disease Study (LEADS) is the world's largest study of early-onset (also called younger-onset) Alzheimer's. The study, funded by the National Institute on Aging, will determine the similarities and differences between early-onset and late-onset Alzheimer's and is creating an infrastructure to launch clinical trials and potentially test experimental medications that may help all people living with the disease. Dr. Maria Carrillo is one of the study's four principal investigators, and the Association is responsible for supporting recruitment and retention activities. In addition, the Association's Greater Indiana Chapter announced a \$1 million grant to a LEADS whole genome sequencing add-on study.

Part the Cloud, founded in 2012 by philanthropist Michaela "Mikey" Hoag in partnership with the Association, has generously funded more than \$30 million in research awards. In FY19, Part the Cloud awarded five grants to accelerate Alzheimer's research by funding the most promising early phase clinical studies via the Part the Cloud Transitional Research Grant Program. The grants totaled over \$3.4 million and are the seventh round of the Part the Cloud movement. Part the Cloud also awarded \$3 million to Longeveron LLC, the Part the Cloud Challenge on Neuroinflammation finalist whose research showed the most promise after an initial two-year study.

To enable researchers to explore new ways to prevent, reduce or remove tau — a toxic protein found in the brain that is a hallmark of Alzheimer's, frontotemporal dementia and other neurodegenerative disorders — the Association and the Tau Consortium partnered to fund the **Tau Pipeline Enabling Program (T-PEP)**. Grants totaling \$3 million provided five U.S.-based researchers the ability to investigate new ways to target abnormal tau.

TrialMatch, the Association's clinical studies matching service, continues to engage constituents in research by making information about clinical trials easy to access and understand. TrialMatch provides customized

lists of treatment, diagnostic, prevention, quality-of-life and online studies, along with appropriate contact information, for more than 350,000 users. The TrialMatch database now holds trial summaries for 415 clinical trials across the United States, compared to an average of 262 over the past three years. Additionally, TrialMatch supports recruitment activities for U.S. POINTER and LEADS, Association-led clinical studies of strategic importance to the Association's mission.

GAAIN is the first online platform to provide free and instant access to data normally restricted to only a handful of researchers. With close to 30,000 unique data attributes linking together over 500,000 research participants' data, GAAIN provides a unique resource for the global Alzheimer's and dementia community. In 2019, over 3,000 investigators from 80 countries and nearly every continent utilized the GAAIN interface for their research needs.

The **Alzheimer's Association Research Roundtable** engages scientists from the pharmaceutical, biotechnology, diagnostics, imaging and cognitive testing industries worldwide during two meetings per fiscal year to discuss key areas in Alzheimer's science. "Preclinical Alzheimer's & Prevention Trials" (fall 2018) focused on active clinical trials attempting to address amyloid-related changes in the brain before the appearance of symptoms of cognitive decline. "Alternative Modalities & Active Immunotherapies" (spring 2019), discussed modalities or approaches currently in use and on the horizon, looking broadening the conversation beyond anti-amyloid treatments in late-stage clinical studies.

The **Alzheimer's Association International Society to Advance Alzheimer's Research and Treatment (ISTAART)** is the only professional society for those interested in Alzheimer's and dementia science, including scientists, physicians and other professionals involved in the causes and treatments of Alzheimer's and other dementias. By the end of FY19, ISTAART comprised 4,526 members, a 10% increase over FY18. Participation in one or more of the society's 22 Professional Interest Areas (PIAs), subgroups of researchers sharing common scientific interests, saw a 52% increase.

The Association and the National Institute on Aging at the National Institutes of Health convened **"Enabling**

Precision Medicine for Alzheimer’s Through Open Science,” a symposium on Alzheimer’s and dementia in Chicago July 19–20, 2018. The meeting brought together experts from government, academia, industry and nonprofit organizations.

An **Association-led workgroup** comprised of international experts published appropriate use criteria for spinal tap (lumbar puncture) and cerebrospinal fluid (CSF) analysis in the diagnosis of Alzheimer’s. While not currently in routine clinical practice in the United States, lumbar puncture is anticipated to be a safe and cost-effective way to retrieve spinal fluid to test for biological markers of the disease.

Alzheimer’s & Dementia: The Journal of the Alzheimer’s Association® is the leading peer-reviewed monthly journal in Alzheimer’s and dementia. Its impact factor — a measure of the publication’s influence in the scientific community — increased in FY19 to 14.423.

In recognition of Association leadership in advancing research on the intersection of Down syndrome and Alzheimer’s, **the Association was approved as one of the newest members of the Down Syndrome Consortium.** The consortium, led by the National Institutes of Health (NIH), discusses findings and progress toward achieving research, management, infrastructure and other goals.



**WALK TO
END
ALZHEIMER'S**
alzheimer's association

**TOGETHER,
WE CAN END
ALZHEIMER'S.**
WALK TO
END
ALZHEIMER'S
alzheimer's association

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Increasing Concern and Awareness

*The Association released its annual **Alzheimer's Disease Facts and Figures** report, the definitive compilation of national statistics and information conveying the impact of Alzheimer's disease and other dementias on individuals, families, government and the nation's health care system. The 2019 edition included a special report, "Alzheimer's Detection in the Primary Care Setting: Connecting Patients and Physicians," which explores the benefits of brief cognitive assessments by primary care physicians, and offers solutions for wider adoption among providers.*

Alzheimer's & Brain Awareness Month, one of the Association's leading consumer engagement platforms to raise concern and awareness and share available resources, is recognized each June. In 2019, the Association focused on providing family members with tools to talk about signs of cognitive decline in order to facilitate early diagnosis of Alzheimer's and other dementias. Social media efforts included #EndAlzheimers as a trending hashtag and sharing the Association's custom emoji.

On June 3, the Association launched "**Our Stories**," a national public service ad campaign developed in partnership with the Ad Council and shared across television, radio, print, out-of-home and web media. The campaign features real individuals — including members of the Association's National Early-Stage Advisory Group and their care partners — who noticed signs of potential cognitive decline in a loved one and initiated a conversation. Supporting components include customizable conversation starters, a list of early signs and symptoms of Alzheimer's, information on the benefits of early diagnosis and a downloadable discussion guide.

"United," a new Association concern and awareness campaign, premiered in June. "United" positions Alzheimer's care, support and research as a bipartisan issue that someone of any political affiliation can and should support. Using the messaging "red + blue = purple," the campaign aims to increase awareness of our cause and accelerate concern for the disease across the political spectrum.

The Association's impressive social media presence on **Facebook**, **Twitter** and **Instagram** grew to over 1.1 million users, a 7% increase from the previous year. Impressions surpassed 600 million, making social media

a significant awareness channel, and social engagement across networks continued to outpace all other leading nonprofits. Additionally, Facebook served as a significant fundraising platform. The Association was the recipient of five Shorty Awards, which honor the best content creators and producers on social media, including Best Social Good Campaign.

The Association's website continued to serve as a valuable resource for Alzheimer's care, support and research, providing services to constituents 22,805,150 times in FY19. The Association also delivered critical Alzheimer's information to the public through our 12.5 billion total media impressions.

ALZ, the Association's first nationwide full-mission magazine, launched in January and is currently growing through online and print subscription as well as mass distribution opportunities. The Association developed this free publication to provide information on how to make the brain part of a healthy lifestyle, and to inspire a broad audience to learn about and engage with the cause.

As a result of Association efforts, President Ronald Reagan declared November as **National Alzheimer's Disease Awareness Month** in 1983. In 2018, the Association observed National Alzheimer's Disease Awareness Month and National Family Caregivers Month with multimedia assets designed around the "Faces of Alzheimer's" theme.

The Association's relationship with **Major League Baseball** continued in FY19 with 24 teams joining the movement to end Alzheimer's through a variety of awareness initiatives. Highlights included first pitches; pre-game ceremonies; warning track parades; pre-game and in-game broadcast segments; donated

suites and tickets; concourse information tables; program ads; public service announcements; and purple-clad fans waving pompoms in the Association's signature color. The 2019 season also saw the growth of **Major League Memories**, a program in which retired players visit care facilities to engage people living with Alzheimer's or another dementia through the nostalgia of baseball. The Association partnered with the Boston Red Sox, Chicago White Sox, Los Angeles Dodgers, Pittsburgh Pirates and San Francisco Giants to lead Major League Memories programs within the Alzheimer's and dementia community.

The Association partnered with the **National Hockey League** to host games to raise Alzheimer's awareness, which included Zamboni rides; concourse tables; public address and video board announcements; raffles; and donated suite tickets. In addition to holding their own Alzheimer's awareness games, the **National Basketball Association** shared the Association's **10 Ways to Love Your Brain** messaging across their social channels during NBA FIT Week, March 14-21.

The **#ENDALZ Athletes** program officially launched in 2019. The new program highlights athletes and members of the sports community who are making a difference in the fight to end Alzheimer's through their fundraising, advocacy and awareness efforts. Since its launch, #ENDALZ Athletes has engaged over two dozen athletes across a variety of sports.

The Association debuted **Around the Table**, a concern and awareness initiative that celebrates the power of food and conversation in connecting individuals, families and communities. The campaign features culinary influencers such as Carla Hall, Art Smith, Hugh Acheson and Scott Conant sharing personal and relatable experiences that we would never want to lose. As part of the campaign, the Association partnered with BuzzFeed's food platform, Tasty, to create a video series with Culinary Champions sharing recipes and discussing some of their most poignant moments Around the Table.

The Association partnered with former First Lady of California Maria Shriver and the Women's Alzheimer's Movement on **AlzheimerHer's Chorus**, a PSA project and video that premiered during SXSW. The PSA spotlights choirs from around the country comprising women facing Alzheimer's. A new karaoke-style

Facebook filter, which enables audiences to sing along with the AlzheimerHer's Chorus, was rolled out during the launch.

In honor of International Women's Day in March, **the Association participated in a SXSW panel** on the ways Alzheimer's disproportionately affects women, with a special focus on the importance of younger audiences joining the conversation around the disease. The all-women panel was moderated by journalist Ashley C. Ford and featured Maria Shriver; neuroscientist Dr. Farida Sohrabji; and actress and Alzheimer's Association Celebrity Champion Alexandra Socha.

For the 10th consecutive year, the Association was recognized by *The NonProfit Times* as one of the **"Best Nonprofits to Work For,"** moving from third to second place in the Large Nonprofit Employer category. This year's survey emphasized employee development, recognition measures and workplace culture.

Exhibit T - Part 4



Strengthening Diversity and Inclusion

As the number of individuals facing Alzheimer's continues to climb, in FY19 the Association strengthened its dedication to reaching diverse and underserved communities — many of which are disproportionately impacted by the disease. In January 2019, Reynick Martinez joined the Alzheimer's Association in the new role of Chief Diversity & Inclusion Officer. With an extensive background in health systems, building partnerships and engaging priority audiences, Martinez leads the Association's diversity initiatives and is responsible for developing strategic partnerships with diverse groups and communities — work that touches every aspect of the Association's mission.

As an organization committed to fostering a culture of representation and inclusion, the Association launched the **Diversity & Inclusion Workgroup**. This 21-member collective includes staff from across the organization and is focusing on several key objectives, such as improving internal engagement; delivering specific talent recommendations; developing a framework to mobilize priority communities; and identifying metrics to measure diversity and inclusion outcomes.

Throughout FY19, the Association created important resources and established partnerships designed to broaden its outreach efforts. Together with its national partner Advocacy and Services for LGBT Elders (SAGE), the Association **launched a collaborative report titled *Issues Brief: LGBT and Dementia***. The brief outlined challenges faced by members of the LGBT community living with or caring for someone with dementia, and offered recommendations for health care providers, organizations and individuals. The Association also developed new consumer-friendly materials to help raise awareness of issues and barriers faced by LGBT older adults.

Recognizing that Hispanic adults are at greater risk of developing Alzheimer's disease, the Association announced **a collaboration with the Mexican Consulate** in September 2018. Working through the Mexican government's Ventanillas de Salud Program (VDS), a binational program joining government and nonprofit agencies, the partnership aims to better connect Mexicans living in the United States with important information relating to Alzheimer's detection, diagnosis, care, treatment, research and advocacy. To help raise awareness of the prevalence of dementia in Hispanic communities and highlight available resources,

the Association participated in online and media outreach activities across the country during National Hispanic Heritage Month.

The Association remains committed to reaching more Spanish-speaking individuals through the translation of education and outreach materials. During a partnership with the Ad Council to create the national "Our Stories" campaign encouraging honest discussion of cognitive concerns, the Association also developed **a parallel Spanish-language campaign**. Read the Increasing Concern and Awareness section for more information.

Distilled and translated from *2019 Alzheimer's Disease Facts and Figures*, the Association offered **an infographic and fact sheet in Spanish**. These materials are used to assist in recruiting and training Spanish-speaking volunteers for media opportunities and cultivating relationships in the community.

In June 2019, the Association and the African Methodist Episcopal (AME) Church finalized **a three-year nationwide partnership to increase concern and awareness of the disease**, and connect AME members and communities with the Association and its resources. The AME Church is the first independent Protestant denomination founded by black Americans and one of the largest historic African-American churches, with more than 2 million congregants in the United States and an international membership that spans five continents and 39 countries. This partnership is a vital opportunity to engage AME communities in all aspects of the Association's mission.

In the February 2019 issue of *Alzheimer's & Dementia: The Journal of the Alzheimer's Association*, members of

ISTAART's Professional Interest Areas collectively **published a paper examining ethnic and racial disparities in dementia**. It provided a concise “state-of-the-science” report of ethnic and racial factors, and updated recommendations to address gaps in dementia science across populations. *Read the Accelerating Research section for more information on ISTAART.*



#ENDALZ

alzheimer's association

AIM
ALZHEIMER'S IMPACT MOVEMENT

Advancing Public Policy

Thanks to the strategic efforts of the Alzheimer's Association, the Alzheimer's Impact Movement (AIM) and a nationwide network of relentless advocates, Congress once again approved and the president signed into law a historic increase for Alzheimer's and dementia research funding at the National Institutes of Health (NIH). The record-setting \$425 million increase brings annual funding at the NIH to \$2.4 billion and marks the fourth consecutive year Congress has taken unprecedented action to address the growing Alzheimer's crisis through research.

This bipartisan effort was led by Senate Appropriations Labor, Health and Human Services, Education and Related Agencies Subcommittee Chairman Roy Blunt (R-Mo.) and Ranking Member Patty Murray (D-Wash.), and by House Appropriations Labor, Health and Human Services, Education and Related Agencies Subcommittee Chairman Tom Cole (R-Okla.) and House Appropriations Committee Ranking Member Nita Lowey (D-N.Y.).

The Association and AIM were instrumental in the development, introduction and passage of the **Building Our Largest Dementia (BOLD) Infrastructure for Alzheimer's Act**, which will create an Alzheimer's public health infrastructure across the country to implement effective interventions focused on public health issues. Introduced by Sens. Susan Collins (R-Maine), Catherine Cortez Masto (D-Nev.), Shelley Moore Capito (R-W.Va.) and Tim Kaine (D-Va.), and Reps. Brett Guthrie (R-Ky.), Paul Tonko (D-N.Y.), Chris Smith (R-N.J.) and Maxine Waters (D-Calif.), the bill quickly developed enormous bipartisan support. More than half of the 115th Congress — 58 Senators and 256 Representatives — cosponsored the bill, which authorized \$100 million over five years to carry out the various public health activities addressing Alzheimer's and other dementias.

In a testament to the Association's successful efforts in organizing bipartisan support for the Bold Act, Gov. Steve Bullock (D-Mont.) and Gov. Charlie Baker (R-Mass.) penned a **Newsweek editorial** in July 2018 titled "Alzheimer's: The Issue Republicans and Democrats Agree On," urging Congress to pass the bill. To continue to build on the wave of support, the Association and AIM organized a record-breaking virtual lobby day in November 2018, encouraging

constituents to share messages of support for the bill with members of Congress.

In July 2018, the House unanimously passed the **Palliative Care and Hospice Education and Training Act (PCHETA)**. This legislation, introduced by Rep. Eliot Engel (D-N.Y.), Rep. Tom Reed (R-N.Y.), Sen. Tammy Baldwin (D-Wis.) and Sen. Shelley Moore Capito (R-W.Va.), would ensure an adequate, well-trained palliative care workforce through training, education and awareness, and enhanced research. The bill did not pass in the 115th Congress but was reintroduced in the 116th Congress. The Association and AIM continued to grow support for the legislation.

The Association and AIM worked closely with congressional champions on the bipartisan **Improving HOPE for Alzheimer's Act**. Introduced by Sen. Debbie Stabenow (D-Mich.), Sen. Susan Collins (R-Maine), Rep. Paul Tonko (D-N.Y.) and Rep. Jackie Walorski (R-Ind.), the bill had 36 cosponsors in the Senate and 69 in the House at the end of FY19. This legislation would support provider education and outreach to improve awareness and utilization of comprehensive Alzheimer's and dementia care planning services covered under Medicare. In May 2019, advocates from across the nation joined AIM and the Alzheimer's Association for a virtual lobby day to grow support for the Improving HOPE for Alzheimer's Act. Over 1,550 advocates sent nearly 3,300 messages to legislators through email, phone calls and social media urging their members of Congress to support the bill.

The Association and AIM championed the introduction of the bipartisan **Younger-Onset Alzheimer's Disease Act**. Led by Sen. Susan Collins (R-Maine),

Sen. Bob Casey (D-Penn.), Rep. Kathleen Rice (D-N.Y.) and Rep. Pete King (R-N.Y.), the legislation would amend the Older Americans Act (OAA) to allow individuals under age 60 who are diagnosed with younger-onset Alzheimer's disease to access the OAA's support programs, including nutritional and supportive services and respite care through the National Family Caregiver Support program. To grow support, the Association and AIM **mobilized advocates for an online day of action** in June 2019, sending more than 9,000 messages to members of Congress via social media. At the close of FY19, the bill had 119 cosponsors in the House and 25 cosponsors in the Senate.

The Association joined forces with the Centers for Disease Control and Prevention (CDC) to develop the third in a series of **Healthy Brain Initiative (HBI) Road Maps** to advance cognitive health as an integral component of public health. The HBI *State and Local Public Health Partnerships to Address Dementia: The 2018-2023 Road Map* outlines 25 specific actions state and local public health agencies and their partners can take to continue to promote cognitive health, improve early detection of Alzheimer's and quality of care, and help meet the needs of caregivers. The Association and the CDC also co-developed the **HBI Road Map for Indian Country**, a companion guide intended to stimulate public health approaches to Alzheimer's in American Indian and Alaska Native communities.

The Association and the Association of State and Territorial Health Officials (ASTHO) **announced the launch of the HBI Planning Lab**. State health departments in Arizona, California, Idaho, Maine, Nevada, Oregon, Texas and Wyoming will work with the Association and other partners to develop action plans addressing Alzheimer's disease and other dementias as chronic conditions.

More than 1,200 advocates from all 50 states descended upon Washington, D.C. for the **2019 Alzheimer's Impact Movement Advocacy Forum**, the nation's premier Alzheimer's advocacy event. Over three days, advocates learned about policy priorities from Association experts and met with elected officials to encourage their support of the cause.

Advocacy Forum attendees and policymakers gathered at the **National Alzheimer's Dinner** to honor leaders who work tirelessly in the fight to end Alzheimer's and

celebrate advances. Honorees included Cindy Harris, recipient of the 2019 Advocate of the Year Award, and Aaron DeNicola, winner of the 2019 Young Advocate of the Year Award. Actress and Alzheimer's Association Celebrity Champion Ashley Williams emceed the event, while Emmy- and Golden Globe-nominated actress and Celebrity Champion Kate Mulgrew gave the evening's keynote address.

On **Hill Day**, the culmination of the Advocacy Forum, advocates donning purple sashes stormed Capitol Hill to meet with lawmakers and their staff. Delegations of advocates shared their personal experiences with Alzheimer's and asked for renewed commitment to research funding and care and support policies from the federal government. In addition, advocates attended a **Senate Special Committee on Aging hearing** titled "Alzheimer's: New Directions in Biomedical Research and Caregiving."

The Association and AIM continued working to **advance public policies at the state and local levels** to improve the lives of all those affected by Alzheimer's. Association staff and advocates have secured over \$90 million in state appropriations since January 2019 for Alzheimer's-specific care and support services, research, public health activities, home and community-based services and other areas to meet the needs of individuals and families living with dementia. With a frequent presence in state capitals, the Association is working to increase public awareness, early detection and diagnosis; build a dementia-capable workforce; increase access to home and community-based services; enhance the quality of care in residential settings; and implement State Alzheimer's Disease Plans.

The Association made strides in the goal to obtain nationwide collection of the optional Cognitive Decline Module in all states' **Behavioral Risk Factor Surveillance System (BRFSS)** surveys. In addition to the 31 states that secured the module for the 2019 BRFSS survey, eight states have confirmed inclusion in their 2020 surveys. Applications are pending in the remaining states.

In FY19, the Association and AIM **held 2,206 meetings with members of Congress and their staff** in Washington, D.C., and district offices, with significant growth experienced in the number of advocates and elected officials present. Advocates,

Ambassadors — volunteer leaders who develop trusted relationships with their assigned congressional office through ongoing, personal contacts — and members of Alzheimer’s Congressional Teams — groups of advocates who assist in district grassroots activities — conducted the majority of these meetings. To further extend the reach of the Association and its legislative priorities, staff and advocates attended 1,778 town halls or other community events hosted or attended by a member of Congress or their staff. The Association and its advocates made an additional 13,029 points of contact with members of Congress through letters to the editor, op-eds and social media.



AN ORIENT (WALK) VOUCHER

TO: ALZ Puffie Winner

FROM: RIGIE

DOLLAR AMOUNT: 2 MONTHS

BE USED FOR: TRAINING
(EXCLUDES
TOWN (RIGIE))

ALZ
4/16/19
RECOVERY
18

Increasing Revenue

Generous contributions from constituents, corporations and other organizations make an enduring impact on the lives of those facing Alzheimer's and continue to move us closer to our vision of a world without the disease. This support also fuels greater awareness of the Alzheimer's Association and its resources, and engages the public in the cause. In FY19, Association donors and partners contributed to total revenues of \$393 million.

Direct marketing efforts using email, print and phone raised \$61 million through engagement with **687,846 donors**. Digital donations across all platforms increased by 5% over FY18 to reach \$21 million, while gifts over \$1,000 also showed a 5% increase. Facebook fundraisers experienced impressive growth, generating \$26 million more than last year, resulting in over \$34 million donated. Donations from engaging constituents in Giving Tuesday also grew 31%, its most successful year.

The **Alzheimer's Association Walk to End Alzheimer's**, the world's largest event raising awareness and funds for Alzheimer's care, support and research, continued to grow, generating \$97 million — a 9% increase over the previous year. Walk participation was up 5%, with 526,000 people taking part in 632 walks across the country. The 2018 season also saw 43 companies and organizations create National Team Programs, resulting in 7,680 teams raising \$13 million.

The Longest Day — held on the summer solstice, June 21 — is when thousands of participants from across the world came together to fight the darkness of Alzheimer's through a fundraising activity of their choice. Together, they used their creativity and passion to raise \$8.8 million for Association care, support and research efforts, a 13% increase and the highest amount in the event's history. The American Contract Bridge League celebrated its seventh year as the Inaugural Global Team and raised over \$6 million.

Due to the success of Walk to End Alzheimer's and The Longest Day, the Association was named the **Fundraising Organization of the Year** by the Peer-to-Peer Professional Forum. The award recognizes the development of record-shattering campaigns that set the standard for nonprofits across North America. Walk to End Alzheimer's is the only large walk campaign in the United States that has grown its annual revenue each year since 2006. In 2018, the event was the nation's third-largest peer-to-peer fundraising campaign.

Financial services firm **Edward Jones** expanded on its five-year national strategic alliance with the Association. The company was the National Presenting Sponsor of Walk to End Alzheimer's and through the participation of nearly 21,200 participants on 3,578 teams, raised \$3.3 million, a 43% increase over the previous year. Edward Jones' contribution to the Association in FY19 totaled more than \$6 million, a 22% increase, including \$2.5 million in corporate support. Edward Jones once again sponsored the Alzheimer's Association International Conference (AAIC) through a gift of \$50,000 to demonstrate its commitment to the Association's international research program. The company also raised awareness of the disease by organizing a relay walk across America that had more than 1,000 employees hike 3,100 miles over 96 days.

The **Part the Cloud Luncheon**, hosted by founder Michaela "Mikey" Hoag and co-chaired by Stephanie Harman and Heather Pietsch, raised \$1 million for new, promising Alzheimer's research. Held Feb. 13, 2019, in Menlo Park, California, the event hosted award-winning actress and Alzheimer's Association Celebrity Champion Marcia Gay Harden; Frank Longo, Stanford neurology professor and past Part the Cloud grant recipient; and Eric Siemers, president of Siemers Integration. Since 2012, the Part the Cloud program has raised over \$30 million to fund 34 grants that foster the progress of cutting-edge, early phase clinical studies with the highest probability of slowing, stopping or curing Alzheimer's.

Recognizing their outstanding work in advancing Alzheimer's research, **Joanne Knight and her late husband, Charles F. "Chuck" Knight, and FBRI LLC** were awarded the 2018 Jerome H. Stone Philanthropy Award for Alzheimer's Research, which annually recognizes the world's top philanthropists for actively engaging in the Alzheimer's cause. The Knights have contributed \$15 million to Washington University to help launch a research center studying

Alzheimer's and related brain disorders. FBRI LLC was acknowledged for funding early-stage Alzheimer's research in academia and industry, as well as investing in several Alzheimer's-focused biotech companies.

The **Alois Society**, which includes members who make an annual gift of \$1,000 to \$9,999, saw revenue grow 5% to \$14.1 million, while the total number of gifts also increased 12% to 7,802.

Comprising philanthropists who make a gift commitment of \$1 million or more, the Alzheimer's Association **Zenith Society** sets the bar for philanthropic leadership, engagement and impact. The Association welcomed seven new members in FY19, increasing the society's total to 86. Joanne Knight made the largest individual commitment received by the Association to establish the Knight Family Dementia Care Coordination Initiative, which is enabling the Association to form partnerships with health systems and hospitals in Missouri and Illinois to coordinate comprehensive dementia care, information and support among health care providers, Association clinical teams and family caregivers. A \$1.6 million gift from Jerre and Mary Joy Stead enabled the Association's 24/7 Helpline to hire more staff and conduct a research study to create the evidence base needed to develop a replicable model for telephone-based care. Vicky Patel and an anonymous Zenith Society member each made \$1 million commitments to the U.S. POINTER clinical trial, bringing philanthropic support of the \$35 million study to nearly \$8 million. Zenith Society members helped secure nearly \$43 million for the Association's mission in FY19 through personal gifts, special events, direct marketing challenges, Walk to End Alzheimer's and more.

Members of the **Founders Society** make gifts through a will or trust, by beneficiary designation, through a charitable gift annuity or other planned gift arrangement. The Association received \$46.7 million from donors who made legacy contributions in FY19.

The Alzheimer's Impact Movement welcomed 32 new members to the **AIM Leadership Society**, a group of generous donors committed to making Alzheimer's a national priority. Members, who gave \$789,700 in FY19, make an annual commitment of \$5,000 or more to help advance and develop policies to overcome Alzheimer's through increased investment in research, enhanced care and improved support.

Celebrating its 34th year, the **Alzheimer's Association New York Rita Hayworth Gala** was held Oct. 23, 2018, at Cipriani 42nd Street. The event, chaired by founder Princess Yasmin Aga Khan and Anne Hearst McInerney, raised \$1.5 million, and honored Libet Johnson (in memoriam) and her family with the 2018 Champion Award.

The 32nd annual **Alzheimer's Association Chicago Rita Hayworth Gala**, held May 4, 2019, at the Hilton Chicago, raised over \$1 million. The event was led by the Murphy family, co-chairs and avid supporters of the Association. The Legacy Award honored Zenith Society members Joan and Paul Rubschlager. The Caregiver Award was presented to country musician Jay Allen and his family; Allen performed his song "Blank Stares," inspired by his mother who died from Alzheimer's.

The second annual **Napa Valley Wine Weekend** was held May 3-5, 2019. Napa Valley wineries offered their finest bottles to advance research and enhance care for those living with the disease. The event raised over \$1.3 million.

Featuring competition on the gridiron between classic rivalries like Blondes vs. Brunettes and Purple vs. White, **RivALZ**, a series of volunteer-driven flag football games, garnered more than \$1.6 million. A total of 1,700 players participated in 29 events across the country, converting downs into dollars for the fight against Alzheimer's.

Focused on connecting with new constituents and introducing them to the mission, **Reason to Hope** raised over \$1.2 million. Reason to Hope held 22 breakfasts and lunches across the country to discuss the challenges of the disease and the work of the Association.

Revenue from **generous corporate contributors** equaled \$16.9 million and earned millions of impressions to increase concern and awareness of the disease. A complete list of corporate supporters at the \$50,000 level and above is available later in this report.

BJ's Restaurants, Inc., a large and growing casual dining chain that owns and operates 198 restaurants in 27 states, was the Second Annual Proud Supporter of The Longest Day. Together with their customers, BJ's raised \$287,911 in FY19, a 30% increase over the

previous year. BJ's has donated more than \$500,000 to Alzheimer's care, support and research since joining forces with the Association in 2018.

In March, **Marshalls** customers in the United States and Puerto Rico raised more than \$1.7 million to help fund Alzheimer's care, support and research. Marshalls, a chain of department stores owned by TJX, invited customers to make a donation in support of the Association by adding \$1, \$5 or \$10 at checkout in more than 1,000 stores. Since its inception in 2013, the campaign has raised nearly \$10 million for the Association.

Tide, a **Procter & Gamble** brand, renewed their support of the Home Safety Checklist that was developed to help caregivers create a safe home environment for people living with Alzheimer's and other dementias. This resource provides general home safety tips and room-by-room suggestions to help caregivers confidently manage risks and ensure a safe home environment as the disease progresses. Tide has also continued its support of Walk to End Alzheimer's.

In 2019, Bankers Life's annual **Forget Me Not Days®** fundraising campaign aligned with The Longest Day for the first time. With support from agents and associate volunteers across the country, the campaign raised \$190,000 for the Association through donations and associate contributions. Additionally, Bankers Life and its parent company, CNO Financial, pledged \$179,000 in corporate donations. Since the inception of Forget Me Not Days in 2003, Bankers Life has helped raise nearly \$6 million for the Association.

Soft Surroundings, a women's fashion and home décor retailer with 81 locations in 34 states, an online business and a national catalog, built on its successful participation in the Walk to End Alzheimer's National Team Program with cause marketing efforts that raised \$98,000.

Cutco Cutlery, the largest manufacturer of kitchen cutlery in the United States and Canada, joined the fight to end Alzheimer's during Alzheimer's & Brain Awareness Month. Throughout June, 10% of every purchase of a Cutco purple product benefited the Association. The program sold over \$1 million, resulting in more than \$110,000 donated to the Association.

AAIC 2018 received two new sponsors, upping the total number of sponsors to 15 who pledged \$1.5 million in support. In addition, three new companies made contributions to join the Alzheimer's Association Research Roundtable, bringing the current total to 23 members and \$1.2 million.

FY19 Strategic Plan Outcomes

As a leader of the Alzheimer's movement, the Association is committed to do more to expand the depth, breadth and pace of the fight to end the disease. Our outstanding progress in these strategic areas is a reflection of our commitment, the support of generous and dedicated constituents, and our determination to achieve our vision of a world without Alzheimer's.

Progress toward FY19 strategic objectives, as outlined in the Association's FY19-FY21 Strategic Plan, are detailed in the following chart.

FY19 Priority Activities	FY19 Target	FY19 Outcomes
Providing and Enhancing Care and Support		
Maintain the number of individuals receiving direct services delivery.	Maintain FY18 number.	169,000 individuals received direct services. 3% increase, 104% of goal achieved.
Maintain the number of individuals receiving services and grow the use of volunteer-powered delivery.	Maintain FY18 number. Create a baseline percent of unduplicated individuals reached by volunteers.	282,000 individuals receiving services. 12% increase, 113% of goal achieved. 56% of constituents attended support groups, education programs or early-stage programs delivered by volunteers.
Build strategy for health care systems and long-term care and community-based providers to access quality care and diagnosis.	Increase the number of physician referrals from FY18 by 15%. Set baseline for number of health care systems prepared for engagement in FY20. Set baseline for number of long-term care and community-based providers prepared for engagement in FY20.	26% increase, 118% of goal achieved. Pilot phase. Pilot phase.

FY19 Priority Activities	FY19 Target	FY19 Outcomes
Accelerating Research		
Increase investment to support Association's research programs.	FY19 investment will be 2% from chapters and 1% from Home Office, from unrestricted contributed revenue.	\$292 million, 110% of goal achieved.
Association's research programs.	<p>The Medical Science division will conduct 32 in-person community meetings (two per region), developed in collaboration with area and regional leadership.</p> <p>Set baseline of percent of staff attending at least two of four quarterly research presentations.</p> <p>Set baseline of number of locations participating in research studies led by the Association.</p> <p>32 internal regional Research Champions identified in collaboration with area and regional leadership and trained to deliver research presentations.</p>	<p>100% of goal achieved.</p> <p>97% of staff attended two research webinars.</p> <p>Two Association-led nationwide studies: U.S. POINTER (four chapters participating) and LEADS (15 chapters participating).</p> <p>100% of goal achieved.</p>
Increasing Concern and Awareness		
Maintain concern of disease.	Maintain FY18 nationwide percentage.	6% decrease.
Increase unaided awareness of the Alzheimer's Association.	Increase FY18 baseline by 10%.	15% increase.
Increase reach via impressions.	Increase earned impressions by 8% from FY18 baseline.	12.5 billion media impressions.
Strengthening Diversity and Inclusion		
Utilize appropriate metrics; identify and conduct outreach to priority populations at the Home Office and chapter levels.	Set baseline of knowledge for nationwide and local population markets assessed.	To aid in this goal, the Association formed the Diversity and Inclusion Workgroup.
Continue to establish nationwide relationships with local activation strategies.	Set baseline of number of organizations engaged by establishing data standards.	The Association created or continued partnerships with Advocacy and Services for LGBT Elders (SAGE), the National Hispanic Council on Aging (NHCOA), the Consulate General of Mexico and the International African Methodist Episcopal Church.

FY19 Priority Activities	FY19 Target	FY19 Outcomes
Advancing Public Policy		
Increase actions on federal priorities.	Report advocacy actions worth a total of 400 points multiplied by the size of the state's congressional delegation. The specific point target for each member of Congress will vary according to allocations jointly agreed to by the home office and the field.	288,000 actions. 134% of goal achieved.
Increase actions on state priorities.	Report advocacy actions toward state policymakers worth a total of 200 points multiplied by the size of the state's congressional delegation.	208,000 actions. 194% of goal achieved.
Grow number of individuals in the AIM Leadership Society (\$5,000+ donors) to 59.	Increase additional individuals giving \$5,000+ to the benefit of AIM to a total of 59.	Membership grew to 90 (120% of goal achieved).
Increasing Revenue		
Grow total contributed revenue to \$315.6 million.	Revenue target agreed by locale with leadership.	\$393 million in revenue, 13% increase (109% of goal achieved).
Grow total 2018 mass-market event revenue to \$118.3 million.	Revenue target agreed by locale with leadership.	\$112 million in revenue (95% of goal achieved).
Grow Walk season 2018 revenue to \$97 million	Revenue target agreed by locale with leadership.	\$97 million in revenue, 9% increase (100% of goal achieved).

Treasurer's Report

The financial health of the Alzheimer's Association remains strong, with the national organization's Consolidated Statement of Financial Position reflecting total assets of \$378.6 million as of the fiscal year ended June 30, 2019. Together with our network of 77 chapters, total revenues of \$393.5 million increased 12% from 2018, with \$369.7 million from donor contributions fueling the fight against Alzheimer's disease.

Expenses were well managed. Of the total consolidated expenses (with our chapter network) of \$390.9 million, the Alzheimer's Association expended \$299.5 million on programmatic activities to forward our mission.

To advance progress in Alzheimer's disease science, the Association made its largest-ever research investment in FY19, granting more than \$42 million to 162 new scientific investigations. Investments included awards to 139 projects funded through the International Research Grant Program supporting both emerging scientific areas of investigation and new-to-the-field scientists.

The Association continues to meet and exceed minimum standards of 65% program expenses set by the BBB Wise Giving Alliance, devoting 77% of expenses to programmatic activities.

The Association made great progress in our fight to end Alzheimer's and other dementias in FY19. Along with the Alzheimer's Impact Movement, we again helped secure a historic increase in federal Alzheimer's research funding — \$425 million — bringing annual funding at the NIH to \$2.4 billion. We provided care and support more than 9.1 million times through online platforms, phone and in-person care consultations, support groups, education programs and informational materials. We convened nearly 6,000 attendees representing 68 countries at the Alzheimer's Association International Conference (AAIC) in July 2018. We continued to drive the national conversation about Alzheimer's with *2019 Alzheimer's Disease Facts and Figures*, the definitive compilation of national statistics and information conveying the impact of Alzheimer's and other dementias. And as an organization committed to fostering a culture of representation and inclusion, we strengthened our dedication to reaching diverse and underserved communities.

We are honored and grateful that our donors respect our stewardship, embrace our mission and are a vital part of the movement to conquer Alzheimer's disease.

Steve Osgood
Treasurer, Governing Board

Alzheimer's Disease and Related Disorders Association, Inc.

Consolidated Statement of Financial Position

June 30, 2019

(In thousands)

ASSETS	2019	2018
Cash and cash equivalents	\$25,581	\$68,550
Pledges receivable, net	48,841	46,946
Other receivables	7,866	8,616
Inventories of education materials, at cost	802	1,041
Investments	229,875	163,107
Prepaid expenses	6,935	6,164
Assets held in trust	261	248
Fixed assets, net	23,227	24,730
Beneficial interest in split-interest agreements	7,885	7,819
Beneficial interest in perpetual trusts	26,543	26,825
Other assets	828	837
TOTAL ASSETS	\$378,644	\$354,883
LIABILITIES AND NET ASSETS		
LIABILITIES		
Accounts payable	\$9,176	\$6,278
Grants payable, net	59,856	48,510
Deferred compensation payable	419	248
Accrued expenses and other liabilities	24,098	24,094
Self-insurance reserve	1,395	1,112
Gift annuity obligations	5,821	4,228
Deferred revenue	5,475	4,783
Deferred rent	8,694	8,631
TOTAL LIABILITIES	114,934	97,884
NET ASSETS		
Without donor restrictions	137,702	127,183
With donor restrictions	126,008	129,816
TOTAL NET ASSETS	263,710	256,999
TOTAL LIABILITIES AND NET ASSETS	\$378,644	\$354,883

These financial statements have been prepared by management in conformity with generally accepted accounting principles and include all adjustments which, in the opinion of management, are necessary to reflect a fair presentation. This presentation represents a summarization from audited financial statements.

Alzheimer's Disease and Related Disorders Association, Inc.

Consolidated Statement of Activities

Year ended June 30, 2019

(In thousands)

	Without donor restrictions	With donor restrictions	Total
REVENUES, GAINS AND OTHER SUPPORT			
Contributions	\$316,906	\$52,808	\$369,714
Conference registration, contributed services and other	15,573	1	15,574
Dividends and interest, net of investment related expenses	6,745	1,456	8,201
Net assets released from restrictions	57,668	(57,688)	-
TOTAL REVENUES, GAINS AND OTHER SUPPORT	396,912	(3,423)	393,489
EXPENSES			
PROGRAM SERVICES			
Research	62,251	-	62,251
Public awareness, education and diversity	106,581	-	106,581
Chapter services	6,908	-	6,908
Public policy	20,735	-	20,735
Family and healthcare professional services	103,067	-	103,067
TOTAL PROGRAM SERVICES	299,542	-	299,542
SUPPORTING SERVICES			
Management and general	19,254	-	19,254
Fundraising	72,135	-	72,135
TOTAL SUPPORTING SERVICES	91,389	-	91,389
TOTAL EXPENSES	390,931	-	390,931
EXCESS (DEFICIENCY) FROM OPERATIONS	5,981	(3,423)	2,558
OTHER CHANGES IN NET ASSETS			
Net realized and unrealized gains in value of investments	6,795	801	7,596
Change in value of split-interest agreements	(888)	(905)	(1,793)
Change in value of perpetual trusts	-	(281)	(281)
Bad debt expense	(1,369)	-	(1,369)
TOTAL OTHER CHANGES IN NET ASSETS	4,538	(385)	4,153
CHANGE IN NET ASSETS	10,519	(3,808)	6,711
NET ASSETS AT BEGINNING OF YEAR	127,183	129,816	256,999
NET ASSETS AT END OF YEAR	\$137,702	\$126,008	\$263,710

These financial statements have been prepared by management in conformity with generally accepted accounting principles and include all adjustments which, in the opinion of management, are necessary to reflect a fair presentation. This presentation represents a summarization from audited financial statements.

Alzheimer's Association Celebrity Champions

The Association's Celebrity Champions enthusiastically embrace our vision of a world without Alzheimer's disease. Together, we continue to advance scientific discoveries and care and support services to aid those with the disease now and in the future.

Marla Adams

Actress, CBS' "The Young and the Restless," NBC's "Days of Our Lives," CBS' "The Bold and the Beautiful"

Trevor Albert

Producer, "Glen Campbell...I'll Be Me," "Groundhog Day," "The League of Extraordinary Gentlemen"

Jason Alexander

Actor, NBC's "Seinfeld," "Pretty Woman," "Shallow Hal"

Jay Allen

Country music artist

Anthony Anderson

Actor, producer, comedian, ABC's "Black-ish," "Mixed-ish" Freeform's "Grown-ish"

Judd Apatow

Director, producer, writer, HBO's "Girls," "Trainwreck," "This Is 40," "Bridesmaids," "Knocked Up"

Amy Aquino

Actress, Amazon Studios' "Bosch," NBC's "ER," CBS' "Picket Fences"

Katie Armiger

Country music artist

Valerie Azlynn

Actress, TBS' "Sullivan & Son"

Diedrich Bader

Actor, ABC's "American Housewife," HBO's "Veep," ABC's "The Drew Carey Show"

Scott Bakula

Actor, NBC's "Quantum Leap," CBS' "NCIS: New Orleans," UPN's "Star Trek: Enterprise"

Lisa Barber

World Championships Gold Medalist, Team USA Track & Field

Miki Barber

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Joy Bauer

Author, health and nutrition expert, NBC's "Today" show

Sam Beal

NFL cornerback, New York Giants

Maurice Benard

Actor, ABC's "General Hospital"

Leslie Bibb

Actress, ABC's "American Housewife," FX's "The League," "Iron Man," "Iron Man 2"

Ryan Blaney

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Actor, Hulu's "Casual," CBS' "Angel from Hell," "She's Out of My League" "Bachelorette"

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Journalist, CNN

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Comedian, actor, host, ABC's "Whose Line Is It Anyway," CBS' "Let's Make a Deal"

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Actress, CBS' "Life in Pieces," AMC's "Breaking Bad," USA Network's "Pearson"

Creed Bratton

Actor, musician, NBC's "The Office"

Yvette Nicole Brown

Actress, Marvel's "Avengers: Endgame," NBC's "Community," CBS' "Mom," BET Original Movie "Always a Bridesmaid"

Kate Burton

Actress, ABC's "Grey's Anatomy," "Scandal," "127 Hours"

Candace Bushnell

Author, columnist, HBO's "Sex and the City," NBC's "Lipstick Jungle," The CW's "The Carrie Diaries"

Ashley Campbell

Country music singer, daughter of late country music legend Glen Campbell

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Keith Carradine

Actor, songwriter, CBS' "Madam Secretary," HBO's "Deadwood," Showtime's "Dexter"

Kyle Chandler

Actor, Netflix's "Bloodline," NBC's "Friday Night Lights," "Manchester by the Sea," "The Wolf of Wall Street," "Argo"

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Actor, "A Star is Born," "American Sniper," "Silver Linings Playbook," "The Hangover"

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Story: The People Vs. O.J.
Simpson," AMC's "Mad Men"

Movements

Punk-rock band

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ABC's "Dancing with the Stars,"
VH1's "The T.O. Show"

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songwriter

Candace Parker

WNBA forward/center,
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Liars"

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winning actor, CBS' "The Big
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Actor, FX's "The People v. O.J.
Simpson: American Crime Story,"
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"Bloodline"

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NBC's "Frasier," Broadway's
"Hello Dolly"

Tony Plana

Actor, ABC's "Ugly Betty"

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Lights," AMC's "Breaking Bad,"
FX's "Fargo"

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HBO's "John Adams"

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MTV's "The Hills: New
Beginnings," "The Hills,"
"The City"

Scott Porter

Actor, NBC's "Friday Night
Lights," The CW's "Hart of
Dixie," CBS' "The Good Wife"

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Lead vocalist and multi-
instrumentalist, Grace Potter and
the Nocturnals

Carrie Preston

Emmy-winning actress, TNT's
"Claws," HBO's "True Blood,"
CBS' "The Good Wife"

Josh Radnor

Actor, CBS' "How I Met Your
Mother," "Afternoon Delight,"
"Liberal Arts"

Sarah Rafferty

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Ahmad Rashād

Sportscaster, former NFL wide
receiver

Ron Rifkin

Actor, NBC's "New Amsterdam"
and "Law & Order: SVU," ABC's
"Brothers and Sisters," "Alias"

Nicolette Robinson

Actress, Showtime's "The Affair,"
NBC's "Perfect Couples"

Lauren Miller Rogen

Actress, producer, writer, "Like
Father," "Superbad," "Observe
and Report," "For a Good Time,
Call..."

Seth Rogen

Actor, comedian, writer, producer,
director, "Sausage Party,"
"Neighbors," "Pineapple Express,"
"Knocked Up"

Elisabeth Röhm

Actress, The CW's "Jane the
Virgin," NBC's "Law & Order,"
CBS' "Angel"

Jake Rose

Country music artist

Michael Rosenbaum

Actor, producer and comedian,
The CW's "Smallville," "Guardians
of the Galaxy Vol. 2," FOX's
"Breaking In"

Jon Runyan

Former NFL tackle, Philadelphia
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coach

Alzheimer's Association Celebrity Champions, continued

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Actress, Netflix's "The Kominsky Method," CBS' "Dr. Quinn, Medicine Woman," ABC's "Dancing with the Stars," "Wedding Crashers"

Maria Shriver

Renowned journalist and Alzheimer's activist

Leigh Silverman

Director, Broadway's "Violet," "From Up Here"

Molly Sims

Actress, model, NBC's "Las Vegas," "Yes Man"

Patty Smyth McEnroe

Rock 'n' roll music artist

Jean Smart

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Alexandra Socha

Actress, Broadway's "Annie Get Your Gun," "Head Over Heels," Amazon Studios' "Red Oaks," USA Network's "Royal Pains"

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Whiskey Falls

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A Guide To Corporate Giving Strategies

CORPORATE PHILANTHROPY

REPORT

Peer-to-peer fundraising stays steady for 2019

Total revenues for the 30 largest U.S. peer-to-peer fundraising campaigns posted a small decline in 2019, according to an annual survey by the Peer-to-Peer Professional Forum. But similar to last year, the industry is in better shape than these top-line numbers would indicate, as the majority of large American P2P fundraising programs—18 of the top 30—reported revenue increases compared with 2018, meaning that they still offer plenty of opportunity for companies to raise funds for their charitable partners while engaging their employees in philanthropy and community service.

According to the *Peer-to-Peer Fundraising Thirty* report, the top 30 P2P campaigns raised nearly \$1.37 billion in 2019, down from the \$1.39 billion raised in 2018, or a drop of about 1.25%. That follows a similar small decline in 2018, another year in which the numbers improved if you removed the stats from Relay for Life, which the American Cancer Society is phasing out in favor of a wider variety of P2P events help throughout the year.

“While it’s easy to look at the top-line revenue number and assume that peer-to-peer fundraising is struggling, this year’s survey tells a much different story,” said David Hessekiel, president of the Peer-to-Peer Professional Forum.

According to Hessekiel, the *Peer-to-Peer Fundraising Thirty* reflected a number of key trends that have been

shaping the industry the last few years, including:

- **The continued success of walk-based campaigns.** Per the survey data, walk-based campaigns had a particularly strong year in 2019, with 10 of the 16 walk programs included in the top 30 posting increases. In fact, four of these campaigns posted revenue increases totaling more than 10%, including the St. Jude Walk/Run to End Childhood Cancer (up 22%), Out of Darkness Community Walks (up 17.8%), the Komen 3-Day Walks (up 11%), and Walk MS (up 10.6%). These gains come even as many organizations are (See **RATING** on page 12)

Corporate expertise can help nonprofits weather pandemic

As the nation struggles with the ongoing COVID-19 pandemic, nonprofits across the country are being called upon to meet the surging needs of those newly unemployed and seeking resources, whether it’s rent assistance, help paying utility bills, food and medicine, or other essentials. Corporate foundations and giving departments have stepped up in the wake of the disease’s spread, providing large sums of cash assistance as well as in-kind donations like surgical masks, hand sanitizers and other goods that are in need across the country. But companies can also offer a number of other resources their nonprofit partners need and can benefit from as the current crisis goes on, and in the months and years to come.

According to the Taproot Foundation, which helps companies develop customized skills-based employee volunteer programs, companies can apply their business expertise to help charities on a number of fronts, including:

- **Crafting crisis communications.** According to Taproot, some nonprofits—especially smaller ones—lack trained communications teams that can skillfully maintain communications and public relations that appropriately balance tone, brevity and timing. Such skills are standard in a corporate PR department and can easily be deployed on the part of nonprofit partners, (See **PARTNERSHIP** on page 12)

Also In This Issue

News Briefs: Fifth Third Bank expands down-payment assistance program; eBay for Charity announces record-high donations for 2019; Gildan Activewear donates 16,000 T-shirts to support wildfire response 2

Corporate Profiles: A look at the giving programs of Whiting Petroleum; Columbia Sportswear; Orkin; Amer Sports; Matson; Nordson; Charles River Laboratories; Valvoline; Worthington Industries.; and The Timkin Co. . 4

Grant Alerts: Open funding opportunities offered by corporate and foundation sources, including the International Literacy Association, the Blue Cross Blue Shield of Massachusetts Foundation, the American Society for Dermatologic Surgery and the Muscular Dystrophy Association 13

RATING (continued from page 1)

focusing more on cycling, running and even gaming events in lieu of the traditional walks, Hessekiel told *Corporate Philanthropy Report*.

“Leaders of walk programs have been working smarter for several years to improve the performance of their programs. Many have culled underperforming events from their rosters, which has given them more time to focus on programs with growth potential,” he said.

“Although it was easy to say that ‘walks are dead,’ the reality was more nuanced. Program leaders have to work harder and smarter to reap returns from these programs. It’s not a zero-sum game—rides and walks and streaming events can all do well at the same time. They generally serve very different audiences.”

- **The increasing utilization of Facebook in P2P campaigns.** Another key trend is the leveraging of resources via Facebook Fundraisers to help spread the word and attract supporters through this increasingly popular platform.

According to the Peer-to-Peer Forum survey, Facebook’s impact was significant for a number of top 30 programs, including the Pan-Mass Challenge, which integrated with the Facebook Fundraiser app for the first time in 2019 and thereby attracted more than 30,000 new donors and \$3 million in new donations.

“When Facebook fundraising first hit the scene, they provided almost no integration between charities’ traditional peer-to-peer fundraising programs and Facebook efforts,” Hessekiel said. “Since then, Facebook has worked with the major online fundraising

services to enable integration so money raised on Facebook can be recorded as a part of all the money a particular supporter has raised in a specific run, walk, ride or other type of charity-led peer-to-peer fundraising program. Facebook’s ubiquity—billions of people are on it and connected to others on it—is what makes it such a powerful fundraising tool.”

- **A shift away from single campaigns.** While most nonprofits have traditionally focused their P2P strategies around a single large event for the year, today’s charities are increasingly looking for multiple events engaging a variety of audiences and donor types. The most notable example of this, as noted earlier, is the American Cancer Society’s overhauling of its Relay for Life program. In 2019, the organization reduced the number of Relay for Life events by more than 300. It is still a large event by any measure—some 2,200 events were held in 2019—but the reduction in resources devoted to Relay for Life has meant greater attention and success with the ACS’s other campaigns, such as Making Strides for Breast Cancer.

Branching out by adding events and changing event types is likely to continue to catch on among the nation’s charities, especially as the COVID-19 pandemic wreaks havoc on fundraising event schedules, Hessekiel said.

For corporate giving departments, this shift should allow them to offer employees a wider variety — and greater number — of P2P fundraising activities to take part in, which tends to bolster participation and engagement rates.

For more information, the Peer-to-Peer Fundraising Thirty can be found online at <https://www.peertopeerforum.com>. ■

PARTNERSHIP (continued from page 1)

who will benefit from a crisis communications strategy and ongoing communications plan that keeps stakeholders informed and engaged, the organization said.

- **Shifting to virtual program delivery.** According to Taproot, many charities could benefit from corporate IT, marketing and design support that would enable them to convert their in-person content and programming to a virtual/digital format. Companies can also offer strategy consulting to identify the best options, and product management insights to plan and implement the transition, Taproot said.
- **Creative fundraising campaigns.** As “shelter in place” and social distancing decrees stretched across the country, numerous charitable fundraising events were postponed or canceled outright, leaving nonprofits in a lurch. Companies can help these charities transition their in-person events into virtual programs, as well as devise compelling messaging and creative social media strategies that support these new web-based

campaigns and keep supporters engaged and contributing to the organizations, Taproot said.

- **Financial reforecasting.** Fundraising revenues are likely to take a hit at nonprofit organizations of all stripes, at least in the near term. Corporations can help charities weather the most immediate financial challenges and adequately plan for their own economic recovery via the same kinds of financial assessments and forecasting models they use in the business world.
- **Updating human resources policies.** Thanks to the pandemic, many organizations—out of necessity—have asked their workers to do their jobs from home offices instead of company facilities. But telecommuting has its own challenges from an HR standpoint. According to Taproot, nonprofits can use an array of corporate support in this area, such as identifying the necessary policies and procedures to help employees work effectively in this new environment and establishing new protocols for the safety of their employees and clients.

For more information visit <https://taprootfoundation.org>. ■

Exhibit V

2016 Peer-to-Peer Fundraising Top 30 Ranked by Gross Revenue
Produced by Peer-to-Peer Professional Forum. Sponsored by Plenty
www.peertopeerforum.com

Rank	Organization Name	Event Name	Year Founded	2016 Gross	2015 Gross	\$ Change	% Change	2016 Events	2016 Participants
1	American Cancer Society	Relay for Life	1985	\$279,000,000	\$308,000,000	(\$29,000,000)	-9.42%	4,500	2,700,000
2	American Heart Association	Heart Walk	1980	\$123,147,175	\$117,100,000	\$6,047,175	5.16%	305	
3	American Heart Association	American Heart Association Youth Programs	1978	\$85,812,636	\$78,965,000	\$6,847,636	8.67%	29,829	
4	March of Dimes	March for Babies	1970	\$85,700,000	\$95,800,000	(\$10,100,000)	-10.54%	490	233,500
5	Alzheimer's Association	Walk to End Alzheimers	1989	\$82,425,624	\$77,464,687	\$4,960,937	6.40%	623	500,000
6	Susan G. Komen for the Cure	Komen Race for the Cure Series	1983	\$74,879,649	\$86,440,436	(\$11,560,787)	-13.37%	145	925,000
7	National MS Society	Bike MS ¹	1980	\$74,878,892	\$79,969,124	(\$5,090,232)	-6.37%	84	81,516
8	JDRF	JDRF One Walk	1980	\$68,524,697	\$70,459,004	(\$1,934,307)	-2.75%	216	208,994
9	The Leukemia & Lymphoma Society	Light the Night Walk	1999	\$68,517,000	\$61,176,000	\$7,341,000	12.00%	150	244,000
10	American Cancer Society	Making Strides Against Breast Cancer	1993	\$66,000,000	\$66,300,000	(\$300,000)	-0.45%	252	1,400,000
11	Pan-Mass Challenge	Pan-Mass Challenge	1980	\$49,775,000	\$49,299,000	\$476,000	0.97%	1	6,200
12	National MS Society	Walk MS	1988	\$45,995,647	\$47,809,761	(\$1,814,114)	-3.79%	550	284,221
13	Cystic Fibrosis Foundation	Great Strides	1988	\$40,200,000	\$42,300,000	(\$2,100,000)	-4.96%	443	106,000
14	Avon Breast Cancer Crusade	Avon 39 The Walk to End Breast Cancer	2003	\$39,000,000	\$42,500,000	(\$3,500,000)	-8.24%	7	21,000
15	St. Baldrick's Foundation	St. Baldrick's Head Shaving Events	2005	\$34,889,934	\$36,927,839	(\$2,037,905)	-5.52%	1,233	66,260
16	The Leukemia & Lymphoma Society	Team in Training	1988	\$33,700,000	\$40,500,000	(\$6,800,000)	-16.79%		
17	Memorial Sloan-Kettering Cancer Center	Cycle for Survival	2007	\$30,000,000	\$25,000,000	\$5,000,000	20.00%	62	27,000
18	American Diabetes Association	Tour de Cure	1991	\$25,502,125	\$27,269,780	(\$1,767,655)	-6.48%	80	49,043
19	The ALS Association	Walk to Defeat ALS	2000	\$25,468,460	\$24,000,000	\$1,468,460	6.12%	175	131,429
20	Pelotonia	Pelotonia	2009	\$24,104,423	\$23,659,675	\$444,748	1.88%	1	7,749
21	Big Brothers Big Sisters of America	Bowl for Kids' Sake	1972	\$21,462,500	\$21,250,000	\$212,500	1.00%	400	125,000
22	Autism Speaks	Autism Speaks Walk	2015	\$19,926,900	\$22,520,262	(\$2,593,362)	-11.52%	61	110,414
23	Susan G. Komen for the Cure	Komen 3-Day	2003	\$19,825,000	\$20,000,000	(\$175,000)	-0.88%	7	8,750
24	American Foundation for Suicide Prevention	Out of the Darkness Community Walks	2004	\$17,300,000	\$14,800,000	\$2,500,000	16.89%	405	224,000
25	Movember	Movember ⁴	2003	\$17,200,000	\$20,200,000	(\$3,000,000)	-14.85%	1	157,155
26	Junior Achievement USA	Junior Achievement Bowl-a-thon	1982	\$16,556,411	\$16,825,600	(\$269,189)	-1.60%	1,103	96,063
27	ALSAC/ St. Jude Children's Research Hospital	St. Jude Heroes	1999	\$16,400,000	\$14,000,000	\$2,400,000	17.14%	58	31,000
28	AIDS LifeCycle	AIDS LifeCycle	2001	\$16,209,843	\$16,662,798	(\$452,955)	-2.72%	1	5,396
29	National Down Syndrome Society	Buddy Walk	1995	\$14,200,000	\$13,700,000	\$500,000	3.65%	252	330,000
30	Rodman Ride for Kids	Rodman Ride for Kids	1991	\$14,035,000	\$13,300,000	\$735,000	5.53%	1	2,000
Overall Totals				\$1,530,636,916	\$1,574,198,966	(\$43,562,050)	-2.77%	41,435	8,081,690

Footnotes:

1- Bike MS, new reporting system in 2016 may have caused fluctuations in registration fees and sponsorships.

4- Movember reports on a fiscal year ending April 30 basis so 2016 data is for the period ending April 30, 2016

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Exhibit W



EMBARGOED UNTIL 1 P.M., THURSDAY, MARCH 1, 2018

Contact: Peter Panepento
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(202) 531-3886

Peer-to-Peer Fundraising Thirty Survey Shows an Industry in Transition

Revenues Decline for 30-Largest Peer-to-Peer Fundraising Programs, But Signs of Growth Abound

MIAMI — March 1

Peer-to-peer fundraising is in the midst of a major transition, as some of the nation's largest nonprofits shift their focus toward hosting more efficient campaigns and a number of emerging programs show significant growth.

The Peer-to-Peer Fundraising Thirty, which ranks the 30 largest U.S. P2P campaigns, found that these campaigns raised nearly \$1.45 billion in 2017, down 6.6 percent compared with 2016. This decline continues a trend among the top 30 programs, which have seen their collective revenues drop each year since 2012.

But the Peer-to-Peer Professional Forum found that this top-line revenue number isn't the whole story. In fact, the survey and interviews reveal that most large programs are raising more money per participant and many charities are staging multiple campaigns rather than focusing all of their energy on one national-scale series.

“Peer-to-peer fundraising is becoming much more diverse — and much more efficient — than ever before,” said Peer-to-Peer Professional Forum President David Hessekiel. “Nonprofits report that they are taking steps to make sure they are managing their costs and getting more bang for their investments.”

Peer-to-peer fundraising is the practice of having a nonprofit’s supporters take part in an activity such as a walk, bike ride or challenge and reach out to their friends, family members and colleagues for donations.

In the past, peer-to-peer fundraising was dominated by large national health charities that played host to multi-city events.

But the landscape has shifted in recent years with the explosion of social media and do-it-yourself fundraising, in which individuals can easily launch their own campaigns to raise money for their favorite charities.

Indeed, many organizations are moving beyond staging massive national-level campaigns and are focusing on producing a mix of programs that engage more targeted audiences and generate higher margins. As a result, their flagship campaigns are growing more efficient — and they are able to reach new fundraisers with innovative programming that keeps them more engaged.

At the American Cancer Society, for instance, Relay for Life remains its flagship program, by far the largest in the field. But the campaign has a deliberately smaller footprint. Relay for Life raised an estimated \$230 million in 2017 — a decline of \$49 million, or 17.56 percent, compared with 2016.

The campaign, however, was much more efficient than it was in previous years. American Cancer Society reported that it produced 930 fewer Relay for Life events in 2017 than the 4,500 it produced just one year earlier.

With that smaller footprint, each Really for Life participant raised an average of \$115 in 2017 — up more than 11 percent compared with the \$103.33 the average participant raised in 2016. At the same time, the organization is working to cultivate a number of smaller, more nimble programs.

In 2016, for example, the organization launched a new campaign called Real Men Wear Pink with a simple ask — men would wear something pink every day for the entire month of October and raise a minimum of \$2,500 for the fight against breast cancer.

Susan Petre, an American Cancer Society vice president who also oversees its popular Making Strides Against Breast Cancer campaign, says the Real Men Wear Pink effort has caught on quickly. During its first year, Real Men raised \$5.5 million. In 2017, it drew more than 2,600 men in about 200 communities who raised nearly \$7 million.

"We've entered an era where the size of your signature campaign is less important than the overall direction of your peer-to-peer program," said Donna Wilkins, founder of Charity Dynamics, a consulting and technology company that specializes in peer-to-peer fundraising.

"Today, success is measured by your strategy and your ability to meet your key audiences where they are with programs that connect with them. Because of that, we're seeing a number of leading nonprofits move away from having one or two signature events and toward a portfolio of campaigns that give their constituents a variety of ways to participate and support the organization."

Other highlights from the 2017 Peer-to-Peer Fundraising Thirty include:

- * Children's Miracle Network Hospitals popular Dance Marathon series was the fastest-growing P2P program in 2017. Revenues increased 19.63 percent to nearly \$39 million.
- * The Pan-Mass Challenge posted another record fundraising total, generating an estimated \$56.5 million. This total again made the ride the largest single-event peer-to-peer fundraiser in the United States — and marks an increase of more than \$6.7 million over its 2016 total.
- * Memorial Sloan-Kettering Cancer Center's Cycle for Survival raised \$34 million in 2017, an increase of 13.3 percent. Named the 2018 Peer-to-Peer Professional Forum's Program of the Year, Cycle for Survival has seen its revenues quadruple since 2012.

The top 10 American programs by total gross revenue in 2017 were:

Rank	Campaign	Organization	Amount Raised (millions)	% Change
1	Relay for Life	American Cancer Society	\$230.0	-17.6
2	Heart Walk	American Heart Association	\$118.3	-3.9
3	Walk to End Alzheimer's	Alzheimer's Association	\$89.0	8
4	American Heart Association Youth Programs	American Heart Association	\$79.1	-7.8
5	Light the Night Walk	The Leukemia & Lymphoma Society	\$74.0	8.0
6	March for Babies	March of Dimes	\$73.9	-13.7
7	Bike MS	National MS Society	\$68.4	-8.7

Rank	Campaign	Organization	Amount Raised (millions)	% Change
8	JDRF One Walk	JDRF	\$64.1	-6.5
9	Making Strides Against Breast Cancer	American Cancer Society	\$62.0	-6.1
10	Komen Race for the Cure Series	Susan G. Komen for the Cure	\$61.0	-18.6

The Peer-to-Peer Fundraising Thirty is based on survey responses from professionals who manage major peer-to-peer fundraising programs and publicly available data. The full report — and a narrative analysis of the findings — are available on the Peer-to-Peer Professional Forum’s website.

The 2017 survey is sponsored by Charity Dynamics.

Results of the study were unveiled at the Peer-to-Peer Professional Forum’s annual conference today in Miami.

About the Peer-to-Peer Professional Forum

The Peer-to-Peer Professional Forum supports professionals who manage peer-to-peer fundraising events at nonprofits around the world. It offers a growing array of conferences, webinars, research, white papers, and case studies that aim to help these professionals gain knowledge and insights that help them become more effective fundraisers.

Learn more at peertopeerforum.com

About Charity Dynamics

Charity Dynamics delivers what nonprofits need to fulfill their missions: more awareness, supporters, engagement and donations. It provides strategic consulting, creative services, innovative technology and platform expertise with a special emphasis on peer-to-peer fundraising.

Learn more at charitydynamics.com

Exhibit X































P2P Top 30 2018



Sponsored by:
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2018 Peer-to-Peer Fundraising Top 30

Produced by the Peer-to-Peer Professional Forum
Sponsored by Charity Dynamics

Rank	Event Name	2018 Gross	Event Type	Percent Change vs. 2017	
1	Relay For Life	\$184,800,000	Walk	-19.7%	
2	Heart Walk	\$122,654,921	Walk	-2.0%	
3	Walk to End Alzheimer's	\$96,898,684	Walk	8.8%	
4	AHA Youth Programs	\$84,267,440	School	6.5%	
5	Light the Night Walk	\$76,970,400	Run/Walk	4.0%	
6	Bike MS	\$65,519,000	Ride	-4.2%	
7	March for Babies	\$65,457,000	Walk	-11.5%	
8	Making Strides Against Breast Cancer	\$63,500,000	Run/Walk	2.4%	
9	JDRF One Walk	\$63,299,938	Walk	-1.2%	
10	Pan-Mass Challenge	\$59,250,000	Ride	4.9%	
11	Komen Race for the Cure Series	\$54,000,000	Run/Walk	-11.4%	
12	Dance Marathon	\$43,541,124	Dance	11.7%	
13	Cycle for Survival	\$39,000,000	Ride	14.7%	
14	Great Strides	\$38,282,608	Walk	-4.3%	
15	Walk MS	\$37,741,000	Walk	-5.4%	
16	St. Baldrick's Head-Shaving Events	\$31,841,090	Head-Shaving	-5.3%	
17	Pelotonia	\$27,400,779	Ride	4.5%	
18	Walk to Defeat ALS	\$25,452,225	Walk	-1.3%	
19	Team in Training	\$23,300,000	Endurance	-4.1%	
20	Out of the Darkness Community Walks	\$22,600,000	Walk	17.1%	
21	St. Jude Heroes	\$21,600,000	Endurance	22.8%	
22	Bowl for Kids' Sake	\$18,158,343	Bowl-a-thon	-9.2%	
23	Tour de Cure	\$17,810,100	Ride	-11.9%	
24	Autism Speaks Walk	\$17,513,100	Walk	3.3%	
25	AIDS LifeCycle	\$16,695,018	Ride	9.8%	
26	Movember	\$15,820,530	Other	-15.8%	
27	Komen 3-Day	\$15,100,000	Walk	-5.6%	
28	Junior Achievement Bowl-a-thon	\$14,776,156	Bowl-a-thon	-2.2%	
29	PurpleStride	\$14,197,318	Run/Walk	4.0%	
30	Extra Life	\$13,500,000	Gaming Marathon	24.2%	

INSIGHTS

from the Top 30

Largest Increase in
Gross Revenue (YoY)



Newcomer to the
Top 30



Three to Watch



29 of the **30**
programs
were founded
10+ years ago

The Top 30
Gained Back
4%
in revenue decline
when compared to
2017

Revenue and
Participation
ARE NOT
declining at the
same rate

Top 30 events ranked by
% of online donations
is vastly different than
Top 30 by gross revenue

Event Type	% Change in Revenue for 2018
Run/Walk Events	-5%
Single Event	+2%
Ride	+2%
Endurance	+5%



Calling Team Captains

Having a Mobile App /
Boundless Fundraising™

Coaching Your
Fundraisers

Simple and Easy Donation
Experience

Overall Clear User
Experience

Use of Email
Templates



Your Winning Checklist

*charity*DYNAMICS

Fundraising Center with Clear
Next Steps

Having a Mobile-Friendly
Responsive Site

Platforms That Fit Your
Event Type

Tracking and Reporting of
Participant Behavior

Mobile Check Deposit for
Offline Fundraising

Exhibit Y

2019 PEER-TO-PEER FUNDRAISING

TOP 30 GUIDE



SPONSORED BY:



2019 PEER-TO-PEER FUNDRAISING TOP 30

Produced by the Peer-to-Peer Professional Forum

Sponsored by Charity Dynamics

Rank	Event Name	2019 Gross	Event Type	Percent Change vs 2018	
1	Relay for Life	\$161,400,000	Walk	-12.66%	
2	Heart Walk	\$132,398,000	Walk	7.94%	
3	Walk to End Alzheimers	\$98,022,684	Walk	1.16%	
4	Light the Night Walk	\$80,049,216	Run/Walk	4.00%	
5	AHA Youth Programs	\$74,251,000	School	-11.89%	
6	Pan-Mass Challenge	\$70,000,000	Ride	18.14%	
7	Bike MS	\$65,525,686	Ride	0.01%	
8	Making Strides Against Breast Cancer	\$64,600,000	Run/Walk	1.73%	
9	JDRF One Walk	\$62,242,729	Walk	-1.69%	
10	March for Babies	\$48,913,014	Walk	-22.42%	
11	Komen Race for the Cure Series	\$48,325,000	Run/Walk	-10.51%	
12	Dance Marathon	\$44,458,419	Dance	2.11%	
13	Cycle for Survival	\$42,000,000	Ride	7.69%	
14	Walk MS	\$41,755,376	Walk	10.64%	
15	Great Strides	\$38,000,000	Walk	-0.74%	
16	St. Baldrick's Head Shaving Events	\$30,589,571	Head-Shaving	-3.93%	
17	Walk to Defeat ALS	\$26,847,134	Walk	5.48%	
18	Out of the Darkness Community Walks	\$26,625,000	Walk	17.81%	
19	St. Jude Heroes	\$23,343,484	Endurance	8.07%	
20	Pelotonia	\$23,233,696	Ride	-15.21%	
21	Team in Training	\$19,350,000	Endurance	-16.95%	
22	Movember	\$17,850,000	Other	-3.15%	
23	AIDS LifeCycle	\$16,797,717	Ride	0.62%	
24	Komen 3-Day	\$16,765,000	Walk	11.03%	
25	Autism Speaks Walk	\$16,677,000	Walk	-4.77%	
26	Tour de Cure	\$16,508,690	Run/Walk	-7.81%	
27	PurpleStride	\$16,379,122	Run/Walk/Ride	15.37%	
28	Junior Achievement Bowl-a-thon	\$15,302,090	Bowl-a-thon	3.56%	
29	Extra Life	\$15,000,000	Gaming Marathon	11.11%	
30	St. Jude W/R to End Childhood Cancer	\$14,154,987	Walk/Run	22.03%	

2019 SPECIAL RECOGNITIONS

Largest Increase in
Gross Revenue (YoY)



Newcomer to the
Top 30



St. Jude
Walk/Run

Two to Watch



PURPLESTRIDE WAGE HOPE

A DECADE IN REVIEW: GREATER PROGRAM DIVERSITY



PEER-TO-PEER HAS EVOLVED



Event Portfolios Broadened



Programs Went Social (Media)



Digital Acquisition & Stewardship



Offline Went Online



Asking Went Mobile



Technology Explosion



A Day for Giving (Tuesday)



New Payment Options

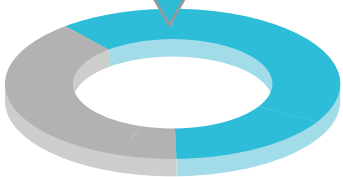


PEER-TO-PEER EXPERTISE

60%

OF THE TOP 30

P2P event programs — by
revenue — use
Charity Dynamics



Whether you need to take your walk, run, endurance or DIY program to the next level or are exploring P2P fundraising for the first time, we know what it takes to inspire supporters to make your mission their own.

Using our expertise in participant engagement and user experience — plus Boundless Fundraising™, our mobile fundraising app suite that enables your participants to become powerhouse fundraisers — we will catapult your supporters into your org's fundraising narrative.



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Austin, TX 78733
(512) 241-0561
info@charitydynamics.com

Exhibit AA



Alzheimer's Association Honored as Fundraising Organization of the Year

February 14, 2019

Email: media@alz.org

Media Line: 312.335.4078

CHICAGO, February 14, 2019 — The Alzheimer's Association has been named as the Peer-to Peer Forum's Fundraising Organization of the Year. This award is a significant honor, especially for the hundreds of thousands of volunteers leading teams and raising money in communities across the country through Alzheimer's Association Walk to End Alzheimer's and The Longest Day events.

"The Alzheimer's Association's commitment to peer-to-peer fundraising is organization-wide and a priority to fuel mission activities and engage more people in the Alzheimer's cause," said Donna McCullough, chief development officer, Alzheimer's Association. "We work every day in partnership with our dedicated volunteers in communities across the country to ensure they see success in their Walk to End Alzheimer's and The Longest Day efforts. It is with their support that we will fulfill the vision of the Alzheimer's Association, a world without Alzheimer's."

In 2018, the Alzheimer's Association's two signature peer-to-peer fundraising events broke previous revenue records. Taking place in more than 600 communities nationwide with over 526,000 participants, the Alzheimer's Association has continued to grow Walk to End Alzheimer's since 2006. Alzheimer's Association volunteers raised nearly \$97 million through Walk to End Alzheimer's, placing the event third among peer-to-peer fundraising events in 2018. In addition, the newer do-it-yourself event program, The Longest Day, saw revenues increase by more than \$2 million, raising \$7.8 million this season.

These successes are just the start, the Alzheimer's Association is enthusiastic about building upon the engagement in its peer-to-peer events and are growing the portfolio of events with the introduction of Ride to End Alz in 2019.

Alzheimer's Association

The Alzheimer's Association is the world's leading voluntary health organization in Alzheimer care, support and research. Our mission is to eliminate Alzheimer's disease through the advancement of research; to provide and enhance care and support for all affected; and to reduce the risk of dementia through the promotion of brain health. Our vision is a world without Alzheimer's. For more information, visit www.alz.org.