

**Campaign Information Package**

**for Chairs & Executive Team Members**

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*The purpose of this guide is to provide information about timelines, events and*

*processes specific to the OPS Federated Health Charities campaign.*

*This guide is intended for all members of your campaign Executive Team: Campaign Chair, Canvasser Coordinator, Special events Coordinator, and Treasurer. This guide can also be shared with your Divisional Leads.*

*There is a separate guide, found* [*here*](https://federatedhealth.ca/wp-content/uploads/2022/02/Campaign-Information-Package-for-Volunteers.pdf)*, for the remainder of your campaign volunteers: canvassers, event organizers, lottery ticket sellers, etc.*

*This guide provides information to get you started in planning your campaign, key details you will need to know to ensure a smooth campaign unrolling, and the answers to all the questions you might get asked along the way. For additional resources and campaign tools that you will need you can visit our Volunteer Resources section on our website*

<https://federatedhealth.ca/volunteers-resources/>

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*You can also follow us on Facebook, Instagram and LinkedIn to keep up with what’s going on with this year’s campaign!*



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**FEDERATED HEALTH CHARITIES – WHO ARE WE?**

**Mission Statement**

Federated Health Charities is a coalition of provincially based health charities in Ontario dedicated to raising funds for its members within the Ontario Public Service that will support health education and awareness, medical research, and client and patient services.

**The Annual Ontario Public Service Campaign for Health Charities**

Each year, Ontario Public Service employees participate in Federated Health Charities, a fundraising and health awareness campaign that provides valuable support for health charities. Just completing its 38th year, Federated Health has been a major contributor to the fight against life-threatening diseases and life-changing conditions. From campaign chairs to canvassers, hundreds of people in the OPS volunteer to give up lunch hours, breaks, or to work late just to make the campaign a success. They are joined by thousands who make donations to the 21 charities represented in the campaign. The money raised goes to fund life-saving research, develop innovative health education and awareness programs, and provide essential patient support services. Of equal importance is the awareness side of the campaign which gives the OPS an opportunity to focus upon strategies for healthy living and to learn about the services provided by the charities.

**Federated Health’s 21 Recipient Charities**

ALS Society of Canada **---** [Alzheimer Society of Ontario](http://federatedhealth.ca/wp-admin/alzheimer-society-of-ontario/) **---**  [The Arthritis Society – Ontario Division](http://federatedhealth.ca/wp-admin/the-arthritis-society-ontario-division/)

Autism Ontario **---** [Canadian Cancer Society](http://federatedhealth.ca/wp-admin/canadian-cancer-society-ontario/) **---** [Cystic Fibrosis Canada](http://federatedhealth.ca/wp-admin/cystic-fibrosis-canada/) **---** [Canadian Liver Foundation](http://federatedhealth.ca/wp-admin/canadian-liver-foundation/)

[Spinal Cord Injury Ontario](http://federatedhealth.ca/wp-admin/spinal-cord-injury-ontario/) **---** [Crohn’s and Colitis Canada](http://federatedhealth.ca/wp-admin/crohns-and-colitis-foundation-of-canada/) **---**  [Diabetes Canada](http://federatedhealth.ca/wp-admin/diabetes-canada)

[Heart & Stroke](http://federatedhealth.ca/wp-admin/heart-&-stroke/) **---** [Hemophilia Ontario](http://federatedhealth.ca/wp-admin/hemophilia-ontario/) **---** [The Kidney Foundation of Canada](http://federatedhealth.ca/wp-admin/the-kidney-foundation-of-canada/)

[Lung](http://federatedhealth.ca/wp-admin/the-lung-association-ontario/) Health Foundation **---** MS Society of Canada **---** [Ontario AIDS Network](http://federatedhealth.ca/wp-admin/ontario-aids-network/)

[Ontario Federation for Cerebral Palsy](http://federatedhealth.ca/wp-admin/ontario-federation-for-cerebral-palsy/) **---** [Osteoporosis Canada](http://federatedhealth.ca/wp-admin/osteoporosis-canada/) **---** Parkinson Canada

[Institute](http://federatedhealth.ca/wp-admin/schizophrenia-society-of-ontario) for Advancements in Mental Health **---** Sickle Cell Awareness Group of Ontario

**1 – FEDERATED HEALTH STAFF AS A CAMPAIGN RESOURCE**

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**Federated Health Charities Office**

You will have all the support you need to ensure your campaign is a success – starting with the Federated Health Charities Campaign staff. It’s our job to help you in any way we can, so please, don’t hesitate to call with any questions or concerns.

Sarah Wood – Executive Director: 437-925-6227 [sarah.wood2@ontario.ca](mailto:sarah.wood2@ontario.ca)

Tatyana Parfenyuk – Manager of Finance & Admin: 647-278-9861 [tatyana.parfenyuk@ontario.ca](mailto:tatyana.parfenyuk@ontario.ca)

**Campaign Team Trainings**

Federated Health Charities Campaign staff will provide training for all levels of your campaign team. We can meet with your Campaign Chair, Executive Committee Members (Treasurer, Special Events Coordinator, Canvasser Coordinator, Lottery Sales Coordinator), and Canvassing volunteers to provide trainings on how best to complete their role and achieve success. Contact Sarah Wood to schedule these trainings.

**Recipient Charities Participation**

Our recipient charities have offices across the province and are available to participate in your campaign by providing speakers, attending health fairs, etc. Please go through Sarah Wood, Executive Director, to arrange involvement of the charities.

**Federated Health Charities Charitable Registration Number**

The Charitable Registration Number for Federated Health Charities Corporation is 85413 5480 RR0001.

**2 – 2022 CAMPAIGN BASICS**

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**Key Dates**

The timelines of the 2022 campaign period have been set to ensure that:

* All fundraising is complete by end of June.
* All campaign submissions are made by end of June.
* Donations made through payroll deduction begin on the first pay date of July; and

|  |  |
| --- | --- |
| DATE | EVENT |
| Feb & March | Business Process and Campaign Planning Training Sessions (Campaign Chairs, Executive Teams) & Recruitment of Campaign Volunteers |
| April 1 | WIN opens for online payroll donations |
| April 1 | Provincial Federated Health Charities Campaign Begins |
| April 1 | First Day of Online Lottery Ticket Sales |
| April 4 | First WIN Financial Report available to Campaign Chairs & Treasurers |
| Mid-June | Campaigns Begin Winding Down and Preparing Submissions |
| June 17 | Last day to donate using a paper pledge form |
| June 24 | Last Day of Online Lottery Ticket Sales |
| June 30 | Campaign Wrap Event & Lottery Draw |
| June 30 | Provincial Federated Health Charities Campaign Closes |
| July 7 | First payroll deduction date |
| July 10 | Last day to make an online payroll donation through WIN |
| Mid-July | Last day to submit event dollars |
| Aug 1 | Last WIN Financial Report available to Campaign Chairs & Treasurers |

**3 – STRUCTURING YOUR CAMPAIGN AND REPORTING**

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**Reporting Structure**

Your campaign reporting should be structured as follows (this may vary slightly due to your ministry/agency size or makeup), with regional campaigns reporting updates, financial results and sending submissions to the ministry/agency Campaign Chair & Treasurer who will compile the overall results for your organization and report/submit to the Federated Health Charities Campaign Staff. As the Chair & Executive Team if you need campaign support you can turn to Federated Health staff. Your ministry/agency Executive Lead will likely want you to run your campaign plan by them for approval as well and provide updates.

**Structuring Your Campaign**

When you are ready to begin building your campaign team (reminder, this can take time so start early) you will want to know how many volunteers you need and for what roles. Each ministry or agency is made-up differently so take the below suggestions as a general guide and adapt it to your specific needs. First and foremost, a volunteer is needed in each workplace (Division, Branch, office, etc. depending on your structure) who can canvass staff, run special events and send out campaign communications. For large ministries or agencies with province-wide workplace locations, it helps to have a Divisional Lead (they act almost as a Campaign Chair for their Division) that can help oversee the volunteers in their division or region and establish a process to roll-up financial reports to send to the Campaign Chair and Treasurer.

**Executive Leadership Lead**

**Federated Health Staff**

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**Divisional Leads (if applicable)**

Treasurer

Special Events Coordinator

Canvasser Coordinator

**Ministry/Agency Campaign Chair**

**Campaign Executive Team**

**Canvassers/Volunteers**

So, what do all these people do? How many of them do you need? See below for an outline:

Executive Leadership Lead:oversees Campaign Chair within ministry/agency and provides leadership support. Campaign Chair will report to this person as well as Federated Health staff. (Number of people needed: 1)

Campaign Chair:plans, implements, and support the provincial wide campaign. Is the main point of contact for Federated Health Charities campaign staff. (Number of people needed: 1)

Campaign Executive Team:works closely with the Campaign Chair to plan and oversee all aspects of the provincial wide campaign. Includes: Treasurer, Special Events Coordinator, and Canvasser Coordinator. Each of these people oversee a specific component of the campaign (finances, ministry/agency wide events, canvassing oversight). (Number of people needed: 1 per role is generally sufficient. Some find it helpful to have two Special Events Coordinators if you will have several ministry/agency wide events)

Treasurer:responsible for managing and reconciling campaign funds for the provincial wide campaign and making submissions to the Federated Health Charities campaign staff. (Number of people needed: 1)

Special Events Coordinator:responsible for provincial ministry/agency events, as well as support regional level events (Number of people needed: 1. Some may find it helpful to have 2, if event plans require the additional support))

Canvasser Coordinator:responsible for coordinating provincial canvassing efforts and supporting regional Canvassers (Number of people needed: 1)

Divisional Lead:oversees volunteers / canvassers within a division or region. Responsible for leading canvassers, sharing experiences and best practices, and rolling up financial reports and submissions to the Campaign Chair and Treasurer. Essentially, acts as a Campaign Chair for their Division (Number of people needed: 1 per Division. If your ministry is small and does not require Divisional Leads you can skip this step)

Volunteers:responsible for promoting the campaign, distributing campaign materials, canvassing employees, and organizing local office events. (Number of people needed: this will depend on your ministry/agency staff size. A general recommendation is 1 volunteer per 20 staff, so if an office has 60 staff then 3 volunteers would be good)

**4 – BEST PRACTICES FOR RUNNING A CAMPAIGN**

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**Checklist for Chairs to Manage the Campaign**

* Meet with Federated Health Charities Campaign [Staff](mailto:sarah.wood2@ontario.ca) for initial training and support
* Identify Campaign Executive Team: Special Events Coordinator, Treasurer, Canvasser Coordinator
* Arrange training for your Campaign Executive Team (this will be conducted by Federated Health [staff](mailto:sarah.wood2@ontario.ca))
* Work with Campaign Executive Team to plan your province wide campaign (goals, timelines, themes, plans)
* Identify Divisional Leads for your regional campaign involvement (structure depends on ministry/agency size)
* Ensure Divisional Leads (if you have them) understand the campaign reporting structure (Federated Health staff can conduct training, if needed)
* Recruit Canvassers and Volunteers for all regional sites (this can take time, so start this early)
* Ensure Divisional Leads, and Volunteers are familiar with Federated Health Charities tools and resources available through the Federated Health Charities [website](https://federatedhealth.ca/volunteers/).
* Arrange Training for your Divisional Leads and Volunteers
* Order Campaign Materials (if you need hard copy versions, email [sarah.wood2@ontario.ca](mailto:sarah.wood2@ontario.ca) to do this) or obtain the [electronic campaign promotional materials](https://federatedhealth.ca/volunteers-resources/) and prepare your [communications](https://federatedhealth.ca/wp-content/uploads/2022/02/Communications-Package.pdf) and promotions plan
* Support your Executive Team, Divisional Leads, and Volunteers throughout the campaign process with regular communication and support
* Provide regular updates and reports to the Federated Health Charities Campaign Staff

**Planning Your Campaign**

Once you have your team together, it’s time to begin planning your campaign. You will want to start planning as soon as you have your Executive Team in place. You do not need to wait until you have all your Divisional Leads and Volunteers in place before you begin planning.

While all the following are optional – except for the canvassing – typically, campaigns consist of these six elements:

* a kick-off event.
* a canvass of every employee to see if they’d like to donate by payroll deduction, cash, cheque, Visa or MasterCard.
* special events (silent auction, bake sale etc.).
* Federated Health Charities Lottery ticket sales.
* a wrap-up event, to celebrate your success and thank those responsible for it.
* volunteer appreciation.

A fillable campaign calendar can be found on our website ([6-week](https://federatedhealth.ca/wp-content/uploads/2022/02/Campaign-Calendar-2022-6-week-electronic.pdf) or [8-week](https://federatedhealth.ca/wp-content/uploads/2022/02/Campaign-Calendar-2022-8-week-electronic.pdf) versions available) to assist you in laying out your campaign plans in a visually appealing way.

As an Executive Team you’ll want to discuss;

* what your campaign’s participation and financial goals will be *(see below for more details on this)*.
* when your campaign will start (official OPS-wide kick-off is April 1st) and end (by June 30), and timelines within those dates – for example, it’s recommended that you complete the canvass first, then run special events.
* how many people there are to canvass, and how you’ll divide the organization up to reach them all (your Human Resources department can help with this).
* how you’ll involve staff across the province in the campaign.
* what special events you’d like to run – especially the large ones that take a lot of planning, such as an on-line silent auction.
* whether you will be running a Vacation Day Incentive Draw (*please see Appendix A –* Vacation Day Incentive Draws *– for information about how to do this)*.
* how you’ll involve senior leadership (*see below for more details on this*).
* how you’ll thank your volunteers.

**Important to Note:** Canvassing is, by far, the most important part of your campaign. It is where you will raise most of your funds, so please prioritize it accordingly. Plan your campaign with a strong focus on canvassing and encouraging pledges. Structure your campaign so you put canvassing first and let the other components of the campaign follow.

**Goal Setting**

Federated Health will provide you with a goal target for this year’s campaign and support you to achieve it. Meet with Federated Health [staff](mailto:sarah.wood2@ontario.ca) to discuss your ministry/agency target for this year’s campaign. Once you have been given your target you will want to break down how you plan to achieve it. This will include determining your fundraising goals for pledges and donations, special events and lottery ticket sales. It can also be helpful to break down your overall target by Divisions, setting specific targets for each Divisional Lead (if your campaign has them). This can be motivating for Leads and hold them accountable for what you expect from them.

**Communicating with Regional Offices**

Ministries/agencies with regional offices have unique challenges when it comes to organizing OPS charity campaigns because the regional offices can often feel disconnected from the rest of the organization. When planning your campaign, try to focus on activities that are inclusive and appeal to all staff no matter where they are. Virtual or online events can be a great inclusive option. Regular communication with your Divisional Leads or volunteers through weekly or bi-weekly status calls or emails, helps to keep people engaged.

Popular activities to promote among regional staff include:

* Non-location specific raffle prizes open to all staff
  + Raffle off vacation days; gift certificates to chain stores; gift baskets that can be couriered; travel coupons, etc.
* Online events/activities:
  + Online auctions, electronic bingo games, etc.

Also, Divisional Leads or branch volunteers will want to know how they are faring compared to other divisions/branches within your organization. This sense of friendly competition can be a good way to keep them engaged. Consider ways to share real-time updates on campaign progress. This will keep momentum going, make all offices feel they are a part of the larger campaign and let teams know how they are progressing towards their targets.

**Engaging Senior Management – Help Them Help You!**

Senior managers play an important role in supporting the campaign and volunteers. They need to be actively involved in fundraising efforts because their own level of engagement will trickle down and signal to volunteers and to staff, that the campaign matters.

As the Campaign Chair of your ministry/agency’s campaign, brief your senior management team on your campaign plan in the month prior to launch. Your Executive Lead can be helpful in facilitating this. This is an opportunity to discuss what they should play and how they can help you. They will want to help, but they just need to know how.

Once you have recruited and trained your volunteers, encourage them to proactively reach out to their management team and involve them in branch events and play a role in fundraising initiatives.

You can also gain support at the management level through your Executive Lead. The primary role of the Executive Lead is to develop a plan and actively engage their senior colleagues to donate (i.e. a Leadership Campaign), however, the Executive Lead should also act as a champion for your campaign. Leverage their role by asking them to promote the campaign in their management meetings and educate managers about the role they can play in supporting volunteers.

Another effective way of getting senior management engaged is through sharing branch level fundraising results midway through the campaign. It will provide them with a sense of where they stand in comparison to the rest of the ministry or organization and they will see if they need to ramp up efforts.

**5 – VOLUNTEERS**

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**Recruiting Volunteers**

Volunteers are the lifeblood of charity campaigns. They have direct access to a pool of potential donors and are the conduit for delivering important campaign information to staff. Highly engaged and self-motivated individuals can make a huge difference to your fundraising results. Finding these gems can be difficult, take a while and requires some strategic thinking. Consider all or some of the following options for recruiting a strong team:

* Think back to last year’s campaign – do you recall anyone who stood out in terms of participating and engaging others? Perhaps they can take on a more involved role this year.
* Publish internal articles that promote the benefits of volunteering, including: expanding your network, honing leadership skills, helping a cause, etc.
* Engage with past volunteers. Contact last years campaign team for a list of past volunteers and reach out to them to see if they would be interested in participating again.
* Do a ministry/agency wide ask-out
* Ask senior leaders to select individuals
* As a last resort, ask Executive Assistants to appoint a volunteer in their respective division (if you have limited time to get your team together you may need to jump right to this step)

**Engaging Volunteers**

It is useful to understand what volunteers want to get out of the experience. A lot of the time, it has to do with expanding professional networks, meeting new people, contributing to a cause, and organizing office events. Try to make the experience more engaging for them by maintaining regular communication with them, involving them actively in campaign planning, educating them on the charities and causes, and most importantly thanking them and giving back to them every step of the way.

**Training & Supporting Your Volunteers**

Employees are giving their time to the campaign on top of their regular job duties. Their time is valuable so try to make their job as easy as possible by giving them supports. Provide sufficient campaign support material that can be found on the Federated Health Charities website so they can just grab it and go. Resources available include:

* Email templates (i.e., thank you messages, status update emails, etc.)
* In-kind donation request letter templates
* Visual material (event posters, logos, etc.)
* Charity promotional videos for canvassing and events

Also, remind volunteers that Federated Health Charities campaign staff can provide resources such as charity speakers.

**Volunteer Recognition**

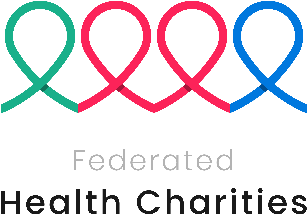
Volunteers don’t expect anything in return for their contribution but finding ways to recognize them in a meaningful way throughout the campaign and afterwards not only shows an appreciation for what they’ve done – it also increases the chance of them becoming return volunteers. Here are some ways you can celebrate your volunteers:

* Ask volunteers to share stories and photos of branch events and showcase these in e-newsletters
* Highlight standout volunteers and their contributions.
* Send hand-written thank you letters to your volunteers.
* Ask your Executive Leadership Lead to personally reach out to volunteers who were highly engaged or delivered outstanding results.
* Consider giving a small gift or certificate at the end of the campaign to each volunteer if your budget allows for it.
* Submit all volunteer names to Federated Health Charities campaign staff to ensure they get submitted into the Volunteer Appreciation draw that occurs at the end of the campaign.

**6 – COMMUNICATIONS MATERIALS & CAMPAIGN RESOURCES**

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**Campaign Logo (alternative formats available by contacting** [**Sarah Wood**](mailto:sarah.wood2@ontario.ca)**)**



**Communications & Messaging**

Please use the provided [communications package](https://federatedhealth.ca/wp-content/uploads/2022/02/Communications-Package.pdf) to assist you in developing your campaign communications strategy. You are free to be creative with it, but this package should get you started with some key messaging and branding information.

**Campaign Theme & Rationale**

Campaign Theme: Heart-to-Heart

Rationale: Federated Health has always been known as ‘the heart of the OPS’. The heart of the OPS is our people and is comprised of many attributes including diversity, resilience, empathy, and generosity. The heart of our communities across the province is comprised of people working to help others, to make the community better, stronger, and healthier. The incredible people at our 21 charities are great examples of that. For our 2022 campaign, we are asking OPS staff to extend their hand in whatever way they are able, to connect *our heart* with *the heart of the community.*

Please engage in a “heart-to-heart” with us.

This campaign is personal. It is one person lending a hand to another person, saying ‘I see you; I hear you and I want to help’.

Please engage yourself in this year’s campaign and put your whole heart into it.

*Listen* to the stories of those living with these devastating illnesses.

*Learn* what these charities are doing to impact your community.

*Share* how you’ve been impacted by these diseases.

*Consider* how you can open your heart to those in need.

Let’s all come together, and have a heart-to-heart, through this year’s campaign.

**Campaign Materials**

There are two pieces of official campaign materials available to you to assist you in running your campaign; the campaign brochure and the campaign poster. These are available in both electronic and hard copy. You can order hard copies by completing the Campaign Materials Order Form (found [here](https://federatedhealth.ca/volunteers-resources/)) and submitting it to Sarah Wood (sarah.wood2@ontario.ca). The electronic versions can be found in the [Volunteer Resources Toolkit](https://federatedhealth.ca/volunteers/) as well.

**Donations Form**

There is a donations form available for your use. This is for anyone who is not donating via WIN. A fillable electronic version of the donation form is available for online canvassing or hard copies of the donations for can be ordered (by filling out the Campaign Materials Order Form) as well. Please ensure the donation form is readily available and easy to access for donors.

**Additional Campaign Resources**

There are additional campaign resources, forms, and tools that you will need to unroll your campaign that can be found on the Federated Health Charities website in the [Volunteer Resources Toolkit](https://federatedhealth.ca/volunteers/). There are also promotional materials available to assist you in promoting the campaign. You will find promotional videos of our charities, compelling client stories, and other items, all in the [volunteer’s section](https://federatedhealth.ca/volunteers-resources/) of the website. You are free to create campaign resources of your own, but these should get you started.

**7 – HOW TO DONATE TO FEDERATED HEALTH CHARITIES (for your information and helpful instructions you can share with employees, so they know how to donate)**

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Employees can donate to the campaign in four different ways:

* Payroll deduction
* One-time donations
* Special events
* Lottery

**PAYROLL DEDUCTIONS & ONE-TIME DONATIONS**

Payroll deductions, also known as pledges, can be made two ways: online through the WIN donations tool or by using the hard-copy donations form.

**Payroll Deduction Using the Online Tool in WIN**

* Donations can be made via payroll deduction in WIN starting on April 1, 2021 through to June 30, 2021.
* Payroll deductions start on the July 7, 2022 pay date and the number of pays you select will determine when your payroll deductions will end.
* If the maximum number of pays available (26) is selected, the last deduction date will be June 22, 2023.
* Payroll deductions can either be renewed annually or the continuous pledge option can be selected.
* Payroll deduction can be cancelled or modified by contacting the OSS Contact Centre.
* The preferred method for donating is through the online tool in WIN as it removes the privacy risks associated with handling paper pledge donation forms with donor personal information.

**How does a donor set up a payroll deduction using the online tool in WIN?**

* On the My Charity page in WIN select the Federated Health Enter New Deduction link.
* Go to the Add New Deductions page by clicking the “Add Deduction” button.
* Enter the charities you would like to support. You can either have your donation be split amongst all 21 charities, or direct only to the charities if your choice. Choose the charities of your choice and enter the amount to be deducted per pay cheque. If you are giving to just some charities, you will repeat this step for each of your chosen charities.
* Enter the number of pays for which the deduction will apply. Press enter.
* Click the “Submit” button.

**What are the benefits of donating through WIN?**

* The most private and secure way to donate
* Donors can designate their donation to any/all the Federated Health charities
* You can choose how much you would like to donate per pay
* Donors can choose to donate the full amount on one pay or spread it out over 26 pays
* You can view your donation amount deduction-to-date at any time
* Payroll donations will automatically be receipted on your T4 slip
* An online donation means you’re supporting the OPS Green Initiative by reducing the use of paper pledge forms.

**Situations where donations cannot be made through WIN**

* Donating by cash, cheque or credit card
* Donating after the July 10, 2022 WIN cut-off date
* Working remotely without access to WIN
* In these cases, the donor will need to use the paper or electronic donation form.

**Paper or Electronic Pledge Form Donation Process**

We strongly encourage the use of WIN to make donations for all those who can. Providing clear instructions and a direct link to the donation page can help encourage those who have access to WIN to use this method for donating. There are some people who are unable to use WIN to donate, so for those cases we have an electronic, or paper, donation form that they can fill out.

**Why would a donor use this method of giving?**

* If you would like to donate by cash, cheque, or credit card
* For employees who do not have access to a computer or who have limited access, the paper pledge form is the most convenient way to give
* You are working remotely but don’t have access to WIN (the fillable electronic version of the form is a good option here)

**Where can donors find a paper or electronic pledge form?**

* Canvassers will be distributing campaign brochures with pledge forms inside them to OPS employees who are working on-site and electronic pledge forms to those working remotely
* The electronic fillable pledge form is also available on the [Federated Health website](https://federatedhealth.ca/wp-content/uploads/2022/02/FHC-Contribution-Form-2022-electronic.pdf)

**What is the process for completing and submitting the form?**

**Donor & Canvasser**

1. Donor completes a paper or electronic pledge form ensuring all the required fields are completed and the form is signed in the appropriate fields.
2. If the donation is a payroll pledge the donor will submit it directly to their Campaign Treasurer. You will want to clearly communicate the person to whom donors should be submitting these forms. They DO NOT submit them directly to OSS themselves. Treasurers see *Appendix C: Submitting Donation Forms to OSS* for instruction on where to send these forms.
3. If the donation is cash, cheque, or credit card the donor will submit it to the campaign Treasurer. Treasurers will submit all donation forms for non-payroll donations (so cash, cheque or credit card) directly to [Federated Health](mailto:tatyana.parfenyuk@ontario.ca), not OSS.
4. If the donor is a Minister, MPP, Ministers Staff or Deputy Minister, the form should be submitted to the Treasurer. Treasurers see *Appendix B: Payroll Donations by Ministers, MPP’s, Ministers Staff & Deputy Ministers* for instruction on where to send these forms.

**Payroll Cut-Off Dates**

To get the full 26 payroll deductions in the year forms need to be submitted on time. OSS has set-out submission deadlines for donations made via WIN or for electronic/hard copy pledge forms. Please see the important submission dates below for payroll pledges and ensure you are mindful of these deadlines in your campaign planning.

| Cut Off Date for Payroll to Receive Paper Pledge Forms | Cut off Date for Payroll to Receive Online Donations | Maximum Number of Payroll Deductions | First Pay Date for Deductions | Last Pay Date for Deductions |
| --- | --- | --- | --- | --- |
| June 3, 2022 | June 26, 2022 | 26 | July 7, 2022 | June 22, 2023 |
| June 17, 2022 | July 10, 2022 | 25 | July 21, 2022 | June 22, 2023 |

**SPECIAL EVENTS**

Special events are the third way you will raise funds through your campaign. Your Executive Team, primarily the Special Events Coordinator, will be responsible for planning and implementing ministry/agency wide special events. A virtual campaign allows for increased opportunity to run events that are accessible and inclusive to members of your ministry/agency that are spread across the province. Additionally, you will want to ensure you have volunteers planning and running special events at the Division and Branch level.

Please note that there is a payment platform available for you to utilize to manage payments for admission to your special events. Participants can pay for entry into your special events through our events payment platform. This can be accessed through our website [www.federatedhealth.ca](http://www.federatedhealth.ca/). Please ensure you are directing people to the correct place to pay for their special events. The events payment platform can be used to pay for virtual events, auctions, purchasing BINGO tickets, purchasing other goods you are selling, etc.

* You can include simple instruction with each of your events promotions that instructs people how to pay for their entry. An example can be seen below:

*If you would like to attend the EVENT NAME please purchase your ticket* [*here*](https://federatedhealth.ca/)*.  Under ‘Event Name’ please enter ‘EVENT NAME’ and under ‘Event Price’ please enter ‘$EVENT PRICE’.  Once you have completed your purchase you will receive a confirmation email, please forward this email to PERSON WHO IS COLLECTING THE TICKETS.*

*Ex:*

*If you would like to attend the Talent Show please purchase your ticket* [*here*](https://federatedhealth.ca/)*.  Under ‘Event Name’ please enter ‘Talent Show’ and under ‘Event Price’ please enter ‘$5.  Once you have completed your purchase you will receive a confirmation email, please forward this email to* [*sarah.wood@ontario.ca*](mailto:sarah.wood@ontario.ca)*.*

**OPS Wide Campaign Wrap Event**

This year we will be holding an OPS wide campaign wrap event with a twist! We will be expanding the popular [Verzuz](https://ontariogov-my.sharepoint.com/:v:/g/personal/rob_irwin_ontario_ca/EX6gBEhEMmlIuI4fObg9NukB-MAkjjMkiQldj22HaA4ZsQ?e=C5ZshS) song battle event that has been held by TBS to be an OPS wide event. Please promote this event as a chance to celebrate the campaign, to see the winners of the lottery draw and as a ‘last-chance’ to donate. The details are as follows:

**What:** Music Battle: Federated Health: The Sound of Giving, a song-for-song battle

**Who:** Deputy Alexander challenges her fellow Deputy Minister’s to a song battle. Watch your favorite deputy’s battle it out in a song-for-song battle! With additional guest speakers.

**Where:** Teams Broadcast Live

**When:** June 30, 2022 at 12 noon

**At the Event:**

-announcement of the preliminary results for the 2022 campaign

-lottery winners announced

-make your last-minute donations

-watch an epic music battle between your favorite DM’s!

**LOTTERY**

The final way you will raise finds for your campaign is by selling tickets to the Federated Health lottery. The lottery gives you an easy-to-run special event activity. Your ministry/agency will receive credit for the full amount of every ticket you sell. Federated Health Charities holds the licence for the lottery and requires that all campaign volunteers adhere to the license requirements:

* The lottery is ONLY open to Ontario Public Service employees. Tickets cannot be sold to people who are not OPS employees.
* Tickets will be sold between April 1 – June 24, 2022.
* The tickets are sold online and are first-come, first-serve. Tickets can be purchased through the Federated Health [website](https://federatedhealth.ca/).

**8 – FINANCIAL REPORTING PROCESS**

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**Step-by-Step Process**

This process may vary depending on the size of your organization and whether your ministry or agency has regional workplaces. However, you choose to manage the financial reporting in your campaign, please note:

* All campaign materials including paper pledge forms, cash, cheques, lottery funds and credit cards go to your ministry/agency Treasurer and they will forward them on to their respective locations (OSS office or Federated Health office). Electronic pledge forms are submitted online. Canvassers/Volunteers should never send hard-copy materials directly to Federated Health themselves; it all must go through the Treasurer.
* Financial submissions and reporting should be done to the Treasurer on a weekly basis.
* Campaign materials including donation forms, cash, cheques, lottery funds and credit cards should be submitted to the Federated Health office on a weekly basis and should not be held to the end of your campaign.
* Donations made by cheque or credit card must be sent to your Treasurer on a weekly basis, along with the completed donation form. Donors expect cheques and credit cards to be processed promptly.
* Due to the virtual nature of the campaign you will see a limited number of hard-copy donation forms and more electronic ones. So, ensure all volunteers and donors know where to email forms.

1. **Process for Regional Campaigns**

* Canvassers/Volunteers canvass the workplace, run events and promote lottery ticket sales.
* Store paper pledge/donation forms, cash, and cheques in a safe and secure place always, until submitted to Divisional Lead or directly to Treasurer if there is no Divisional Lead. Paper pledge forms contain personal donor information and must always be treated as confidential. Canvassers must not share, copy or track paper pledge/donation forms and/or the personal donor information.
* Give all paper pledge/donation forms, cheques, lottery, and event dollars to the Divisional Lead or directly to Treasurer if there is no Divisional Lead, on a weekly basis.

1. **Process for Divisional Leads (if applicable for ministry/agency size)**

* Ensures pledge/donation forms are completed correctly.
* Receives all lottery and event dollars from the Canvassers/Volunteers.
* If ministry has a charity bank account: Divisional Leads must complete a bank deposit slip and deposit all cash into the ministry bank account. The Treasurer will then be notified that a deposit has been made and what the funds are for.
* If ministry does not have a charity bank account: Divisional Leads deliver cash and a completed *Donations Envelope Cover Sheet* (Appendix A) to the Treasurer using a secure method such as in-person or confidential secure mail with signature and tracking. Cash is not to be put in interoffice mail, nor is it to be deposited in volunteer’s personal bank accounts and transferred to the Treasurer.
* Completes a submission package that contains all pledge/donation forms, cheques, lottery funds and cash (if no bank account) with the *Donations Envelope Cover Sheet* (Appendix C)tracking its contents.
* On a weekly basis, gives submission package to the ministry/agency Treasurer.

1. **Process for Ministry/Agency Treasurer**

* Receives all funds, verifies reconciliation process, and inputs results by division.
* Stores pledge/donation forms in a safe and secure place always, until submitted to Federated Health. Pledge/donation forms contain personal donor information and must always be treated as confidential. Treasurers must not share, copy, or track paper pledge/donation forms and/or the personal donor information contained on them.
* Verify that all the pledge/donation forms, cash, lottery funds and cheques that are claimed by Canvassers are accurate. Verify that all cash that has been claimed to be deposited in the bank account is accurate. If there are discrepancies or funds have been received without instructions on what they are for, follow up directly with the submitting Canvasser.
* On a weekly basis, arranges transfer of submissions package, including cheques, cash, lottery funds, and donation forms with a completed *Donations Envelope Cover Sheet* (Appendix C)tracking its contents to the Federated Health Charities office using a secure method.
* On a weekly basis, sends overall financial update to Campaign Chair and Campaign Executive Team.

**9 – CASH MANAGEMENT**

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The Treasurer is responsible for establishing the process for handling cash that comes in. They will then want to communicate this, very clearly, to all members of the executive Team and to all campaign volunteers. For a virtual campaign there should be very little cash being handled, but it is important to know how to manage it should you receive cash or cheque submissions. The determining factor as to how cash is managed is whether your ministry/agency has a bank account set-up for campaign use. You can speak to last years Treasurer to determine whether a bank account is available.

* Handling cash where there is no bank account
  + One-time donations can either be made by credit card, mailed in cheque, by electronic fund transfer (EFT) to Federated Health, or through the [Federated Health website](https://www.canadahelps.org/en/dn/30863).
  + Payment for special events can be done through the Stripe payment platform on the Federated Health website [www.federatedhealth.ca](http://www.federatedhealth.ca/)
  + If you do end up with cash, consult with Federated Health on how it is forwarded to the FHC office
* Handling cash where there is a bank account set up for this purpose
  + In the event there is cash received you will want to provide your campaign volunteers (Canvassers, Event Coordinators, Divisional Leads, Site Treasurers, etc.) with the process and information for depositing funds into your campaign bank account.
  + You will need to determine the information flow to allow you to reconcile deposits (do volunteers email you a deposit slip? Do they complete a form notifying you of what the deposited funds were for?)
  + You will need to determine who is the current signing officer(s) on the account (often last year’s Treasurer and/or Campaign Chair) and possibly update it to make you the signing officer. Federated Health Charities will provide a supporting letter for the bank to switch the signing authority. Please contact Tatyana Parfenyuk at [Tatyana.parfenyuk@ontario.ca](mailto:Tatyana.parfenyuk@ontario.ca) for assistance with the support letter.
* Handling donations made by cheque or credit card
  + Determine how donations made by cheque and credit card will be stored until they can be submitted to the FHC office.

**10 – TRACKING YOUR CAMPAIGN PROGRESS**

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The Treasurer is responsible for tracking the progress of the ministry/agency campaign. To do this they will need to reconcile date from a couple different places to present an overall running total. In that total they will want to include pledge totals from COGNOS reports, cash donations received, revenue from special events, and lottery ticket sales revenue. It is recommended that the Treasurer reconciles these totals on a weekly basis to provide the Chair & Executive Team an up-to-date running total of their progress. It is also recommended to disseminate this progress total to Divisional Leads (if applicable for your ministry/agency) and campaign volunteers. Having a sense of whether their efforts are paying off can motivate your campaign team and allow them to adjust their approach, if needed.

**COGNOS Reports: OSS Pay & Benefits Financial Reports**

* OSS Pay & Benefits will make available the *Federated Health Charities Employee Campaign Chair Report* online to the Campaign Chairs and Treasurers through COGNOS. Updated reports will be available online throughout the campaign, ending Aug 30, 2022.
* To access these reports the Campaign Chair and Treasurer must complete the required application form to obtain access to COGNOS and submit it to Federated Health Charities staff for processing (see the [Steps to Obtaining Reports from COGNOS](https://federatedhealth.ca/wp-content/uploads/2022/02/Steps-to-Obtain-Reports-from-COGNOS.pdf) document)
* The weekly report will contain:
  + Detailed Pledge Donations
  + By Department (the report does not have the capability to provide data by Division, you will need to determine that information manually)
* These reports detail the donations made each week through payroll donation and are cumulative.

**11 – TAX RECEIPTING: Canada Revenue Agency Guidelines**

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Not all donations made through the campaign are eligible for tax receipts and it is important that this information is communicated correctly so donors are not misled.

Donations eligible for a tax receipt:

* Payroll pledges (of $25 in total, or above)
* One-time donations of cash, cheque, or credit card (of $25 in total, or above)

Donations NOT eligible for a tax receipt:

* Special events participation
* Lottery ticket purchases
* Donation of vacation days by leadership

Visit the [Tax Receipting Guide](https://federatedhealth.ca/wp-content/uploads/2022/02/Tax-Receipting-Guide.pdf) for more detailed information regarding tax receipting.

**12 – PRIVACY**

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**Privacy of Donor Information**

Protecting donor rights and privacy is a priority and commitment of both Federated Health Charities and the OPS. It is important that your campaign team adhere to the following fundraising and privacy practices when making solicitations on behalf of Federated Health Charities.

**Privacy Best Practices Checklist**

🗹 Limit the number of people on your committee who will deal with a donor’s personal information.

🗹 Ensure that committee members clearly understand the need to keep personal information confidential and limited to use only for the Federated Health Charities campaign.

🗹 Ensure that reporting donation results cannot identify the person who made the donation.

🗹 Ensure that paper pledge forms with donation information are always stored securely (lock and key) and sent to your ministry/agency treasurer on a weekly basis in secure mail. These forms (and proceeds from events) should not be collected and held until the end of the campaign.

🗹 Do not maintain list of donors for the current campaign year or to use in future years.

🗹 If you find donor information on your office shared drive or in hard copy file folders from past campaigns, delete or destroy the information.

**Privacy Considerations Throughout Your Campaign**

Privacy of our donors and campaign participants is of utmost importance to Federated Health Charities. While we aim to support campaign teams fundraising initiatives, we need to prioritize the privacy of our donors, and will honour that privacy above all else. Please see an outline of privacy parameters that should be considered by campaign teams throughout campaign planning.

**Incentive Draws:** Federated Health will conduct the draw for your incentive programs. We are not able to provide you a list of donors so you can conduct the draw yourself. Once we have conducted the draw, we will contact the winners to gain consent to release their name to the campaign team for publication as the winner. Should the donor decline consent we will draw another winner. Please factor in extra time for us to gain consent from the winner in your timeline for announcing incentive winners.

**Lottery:** Federated Health cannot release a list of donors who have purchased tickets through the online platform to your team. This means you cannot do targeted ticket selling, instead you will need to advertise broadly and use messaging such as “Tickets for the Federated Health lottery are available now! If you have already purchased your tickets, we thank you for your support and you can disregard this message.”

**Special Events:** The online events payment platform will include a statement that reads “by purchasing a ticket to this event you agree to your name being released to the event organizers for event communication purposes”. You are encouraged to have event participants submit their email ticket to you to confirm their purchase, but if needed we can release the names of ticket purchasers to your event organizer.

**Campaign Incentives:** Should you plan to run campaign incentives (ex. Vacation day draws), add a message to your communications that informs participants that by making a pledge they will automatically be entered in to campaign incentive draws or activities with an option to opt out. The following statement would suffice “by making this pledge you will be included in additional campaign incentive activities. If you do not wish to be included please contact ……..”. You will want to appoint someone on your team to be the contact person for these requests.

**Campaign Passport Programs:** If participation in one event grants you access to other events, add a note to your communications that states “participation in this event grants you access to additional campaign events through our passport program. As a result, your name will be included in communications for future campaign events. If you would like to opt out of this, please contact…..”. You will want to appoint someone on your team to be the contact person for these requests.

**Canvassing:** Federated Health cannot release lists of donor’s names to your campaign team. Likewise, we will not confirm whether specific employees have donated. If you have concerns with your report and whether the appropriate employees are appearing on it, you can submit to Federated Health a list of employee names and we will ensure they are credited to your report.

APPENDIX A

VACATION DAY INCENTIVE DRAWS

The vacation day incentive draw has become the most popular method to encourage payroll pledges with nearly all ministry’s and agency’s participating. This draw sees your senior leadership team donating their unused vacations days for you to raffle off as an incentive for those who make a payroll pledge to the campaign. If this is an incentive you would like to offer, find the steps to follow below.

Planning and Preparing for a Draw:

The preparatory process you will need to go through to conduct a vacation day incentive draw is as follows. Please note that it can take time to complete the steps in this process, so it is best to start early to ensure you are all set for your campaign launch.

1. Get internal approval to conduct draw. A good place to start for this is with you Executive Campaign Lead

2. Make request to SMT to donate days (half a day, full day, multiple days, etc.). They cannot receive a tax receipt for the donated day(s) as there is no defined cash value. You will want to do this early enough that you allow time for people to decide if they want to donate and you can have a total number of days available to communicate in your campaign communications.

3. Track days received and who donated them.

4. Determine the total number of days you have available to give away.

5. Determine how you would like to distribute them (ex. If you received 10 days’ worth of vacation, do you want to give away 2 prizes of a week (5 days) each? Do you want to give away 5 two-day vacations? etc.) The larger the amount of time you are giving away (ex a week) the bigger of an incentive it will be for people to donate.

6. Determine if you will have a minimum donation to qualify. It is recommended that you do to avoid donors giving very little money and receiving a considerable prize (such as a week off). The purpose of these incentive draws is to increase donations, so implementing a minimum donation is wise. You can determine your minimum donation based on the size of the prize. Something like $2/pay minimum donation if you are giving away one or two vacation days is fair, perhaps $5/pay minimum (or more) if you are giving away a full week. It is up to you to determine your minimum, different ministries have set different minimums, but the key is to make it relative to the prize and to incentivize donors to give more if they want the chance to win more.

7. Connect with your ministry/agency human resources division to obtain their requirements for the draw. These might include that the winner must use the vacation days before the end of the year, that the days cannot be cashed out or carried over, etc. These requirements can vary from ministry to ministry so ensure you talk to your human resources team to determine the regulations you need to include in the draw and make sure you include these in the “small print” in your draw communications.

8. Plan your communications strategy. The success of your draw will depend almost entirely on how well you communicate it. Have a clear plan made before you begin communicating. This will include knowing the number of vacation days you have to give away, your minimum donation, your donation deadlines, how people can donate, when you will announce the winner, any qualifying restrictions, etc. Map out where and when you will communicate this and ensure all your campaign team (including canvassers) have this information so that everyone is promoting the draw accurately.

Note: it is recommended that you set a requirement of the draw to be that people must make their donations via WIN to qualify. This allows us to conduct the draw in a timely manner. If you allow paper pledge forms to be included, we will have to wait several weeks for them to be processed by OSS before we can conduct your draw and provide you a winner.

Conducting the Draw:

Once you have successfully planned and launched your incentive draw you will want to arrange for the draw to occur. Find the step below.

1. The team at Federated Health Charities conducts the actual draw. This allows donations to remain private and does not require them to disclose to your team that they have donated or how much they have donated. It also means you don’t have to do the work to track and organize the actual draw.

2. You will contact Sarah Wood and Tatyana Parfenyuk at Federated Health to let them know you plan to conduct a draw. You will let them know how many winners you need drawn, your minimum donation and your donation deadline. This is the data we will use to pull donors from the database and produce you a winner(s). We will then notify you of who the winner(s) is, and you can announce it.

3. Based on your donation deadline we can let you know when we will be able to determine a winner and when you can expect to announce. Please consult with us about this before you promote when you will be announcing a winner as there is a timeline that needs to be followed to conduct the draw and this will determine when you can announce your winner.

Awarding the Vacation Days:

Once you have selected a winner(s) you will need to inform people of how the days will be moved from the donor to the winner. The vacation days do not actually get transferred (from the donor to the winner) in WIN. There is a two-step process for awarding the days:

1. The donor of the days will go into their WIN and mark the days as used. If they donated 1 day, they would mark one day as used. They just need to select a day that they will be working (and not taking vacation). This accomplishes the task of them “giving the day away”. After this they are done.

2. Your campaign Executive Sponsor/Leadership will issue a letter to the manager of the winner that states the number of days they have won and any regulations around using the days (the ones laid out by your human resources). It will be the responsibility of the winner’s manager to manually track their usage of the days. The awarded days will not show up in the winners WIN. The manager will receive the letter and the winner will coordinate with their manager the usage of the days. This accomplishes the task of “awarding the days”.

APPENDIX B

PAYROLL DONATIONS BY MINISTERS, MPPs, MINISTERS STAFF & DEPUTY MINISTERS

Pledge forms completed by **Ministers and MPPs** should be forwarded to:

**Merle Chadee**: Manager, Pay & Benefits – Human Resources

Whitney Block, Rm 2420 - 99 Wellesley St W

Toronto ON M7A 1A2

Contact: 416-212-7239, [mchadee@ola.org](mailto:mchadee@ola.org)

Pledge forms completed by **Ministers’ staff** should be forwarded to:

**Agnes Bedorf**: HR Consultant (A)

Cabinet Office

438 University Ave, 11th Floor

Toronto ON M5G 2K8

Contact: 647-201-1573, [agnes.bedorf@ontario.ca](mailto:agnes.bedorf@ontario.ca)

Pledge forms completed by **Deputy Ministers** should be forwarded to:

**Kerry Naabeh**: Coordinator, Deputy Minister Payroll & Pension

Executive Programs and Services Branch – Office of the Public Service Commission

Treasury Board Secretariat

595 Bay St. 12th Floor, Suite 1203

Toronto, ON M5G 2C2

Contact: (416)325-8658, [Kerry.naabeh@ontario.ca](mailto:Kerry.naabeh@ontario.ca)

APPENDIX C

SUBMITTING DONATIONS FORMS TO OSS

Treasurers will submit all payroll-based donations forms to the appropriate OSS payroll centre. If you are unsure which payroll centre to send an employees forms to you can confirm [here](https://intra.ontario.ca/ops/pay-and-benefits-service-centre-list).

The payroll centres are:

GTA [oss.payroll.gta@ontario.ca](mailto:oss.payroll.gta@ontario.ca)

North Bay [oss.payroll.northbay@ontario.ca](mailto:oss.payroll.northbay@ontario.ca)

Orillia [oss.payroll.orillia@ontario.ca](mailto:oss.payroll.orillia@ontario.ca)

Thunder Bay [oss.payroll.thunderbay@ontario.ca](mailto:oss.payroll.thunderbay@ontario.ca)

The OPS Federated Health Charities Campaign Business Process Guide has been approved by:

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Sarah Wood Ian Freeman

Executive Director Assistant Deputy Minister, Ministry of

Transportation

Federated Health Charities Honourary Chair, Federated Health Charities