

Federated
Health Charities

Campaign Information Package

Chairs & Executive Team Members

Welcome to the 2023 Federated Health Charities Campaign!

This information package will help you start planning your campaign. It contains information about campaign timelines, events and processes for the members of your executive team: Campaign Chair, Canvassing Coordinator, Special Events Coordinator, and Treasurer. You can also share this guide with your Divisional/Regional Leads.

A separate [campaign guide for volunteers, including canvassers, event organizers, lottery ticket sellers](https://federatedhealth.ca/volunteers-resources/), etc., and additional resources and campaign tools are available at <https://federatedhealth.ca/volunteers-resources/>.

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1. FEDERATED HEALTH CHARITIES – WHO ARE WE?

Mission Statement

Federated Health Charities is a coalition of 21 health charities that raise funds among Ontario Public Service (OPS), provincial government agency, and the Ontario Provincial Police (OPP) employees to support health education and awareness, medical research, and client and patient services in communities across Ontario.

The Annual Federated Health Charities Campaign

Each year, Ontario public servants in provincial ministries, agencies and the OPP participate in the Federated Health Charities campaign. Now in its 40th year, the Federated Health Charities campaign is a major contributor to the fight against life-threatening diseases and life-changing conditions that affect hundreds of thousands of people in communities all across our province. From campaign chairs to canvassers, each year hundreds of provincial employees volunteer to give up lunch hours, breaks, and work late to make the campaign a success. The money raised goes to fund life-saving research, develop innovative health education and awareness programs, and provide essential patient support services throughout Ontario.

Federated Health's 21 Recipient Charities

- [ALS Society of Canada](#)
- [Alzheimer Society of Ontario](#)
- [Arthritis Society — Ontario Division](#)
- [Autism Ontario](#)
- [Canadian Cancer Society](#)
- [Canadian Liver Foundation](#)
- [Crohn's and Colitis Canada](#)
- [Cystic Fibrosis Canada](#)
- [Diabetes Canada](#)
- [Heart & Stroke](#)
- [Hemophilia Ontario](#)
- [Institute for Advancements in Mental Health](#)
- [The Kidney Foundation of Canada](#)
- [Lung Health Foundation](#)
- [MS Society of Canada](#)
- [Ontario AIDS Network](#)
- [Ontario Federation for Cerebral Palsy](#)
- [Osteoporosis Canada](#)
- [Parkinson Canada](#)
- [Sickle Cell Awareness Group of Ontario](#)
- [Spinal Cord Injury Ontario](#)

2. FEDERATED HEALTH CHARITIES STAFF AS CAMPAIGN RESOURCE

Federated Health Charities Office

Federated Health Charities staff are here to provide you with the support you need to ensure your campaign is a success. Please don't hesitate to reach out to us by phone or email with any questions or concerns:

Sarah Wood – Executive Director
sarah.wood2@ontario.ca
437-925-6227

Tatyana Parfenyuk – Manager of Finance & Admin
tatyana.parfenyuk@ontario.ca
647-278-9861

Kate Halloran
Communications & Corporate Initiatives Lead
kate.halloran@ontario.ca
437-779-2512

You can also connect with the Federated Health Charities team on our [Microsoft Teams channel](#), [Yammer](#) or follow us on social media:

- [Facebook](#)
- [Instagram](#)
- [LinkedIn](#)

Campaign Team Training

Federated Health Charities 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 training on how best to complete their role and achieve success. Contact [Sarah Wood](#) to schedule this training.

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 contact [Sarah Wood](#) to arrange the involvement of the charities.

Federated Health Charities Charitable Registration Number

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

3. 2022 CAMPAIGN BASICS

Key Dates

The timelines of the 2023 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.

DATE	EVENT
Feb. – March 2023	Business Process and Campaign Planning Training Sessions (Campaign Chairs, Executive Teams) & Recruitment of Campaign Volunteers
April 3, 2023	WIN opens for online payroll donations
April 3, 2023	Provincial Federated Health Charities Campaign Begins
April 3, 2023	First Day of Online Lottery Ticket Sales
April 10, 2023	First WIN Financial Report available to Campaign Chairs & Treasurers
May/Early June 2023	Verzuz Song Battle Campaign Event (date TBC)
Mid-June	Campaigns Begin Winding Down and Preparing Submissions
June 16, 2023	Last day to donate using a paper pledge form
June 25, 2023	Last Day of Online Lottery Ticket Sales
June 29, 2023	Campaign Wrap & Lottery Draw
June 30, 2023	Provincial Federated Health Charities Campaign Closes
July 6, 2023	First payroll deduction date
July 9, 2023	Last day to make an online payroll donation through WIN
Mid-July	Last day to submit event dollars
July 31, 2023	Last WIN Financial Report available to Campaign Chairs & Treasurers

4. STRUCTURING YOUR CAMPAIGN AND REPORTING

Reporting Structure

Your campaign reporting should be structured as follows (this may vary slightly due to the composition of your ministry/agency/OPP):

- Regional/Divisional campaigns report updates, and financial results and send submissions to the ministry/agency/OPP Campaign Chair and Treasurer
- Campaign Chair and Treasurer compile the overall results for the ministry/agency/OPP campaign and report them to Federated Health Charities staff.

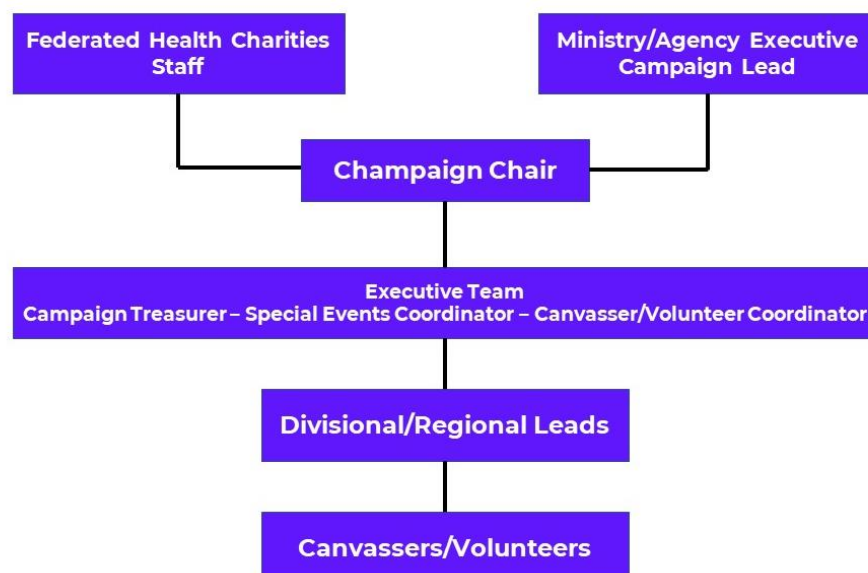
If your Chair and Executive team need campaign support, please reach out to [Federated Health Charities](#) staff. Your ministry/agency/OPP Executive Campaign Lead will likely want you to share your campaign plan with Federated Health Charities staff for approval as well.

Structuring Your Campaign

When you are ready to begin building your campaign team (this can take time so start early), you will want to know how many volunteers you need and for what roles. 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 ministries/agencies/OPP with workplaces across the province, it helps to have a Divisional/Regional Lead (they act almost as a Campaign Chair for their division) who can oversee the volunteers in their division or region, and establish a process to compile and submit financial reports to the ministry/agency/OPP Campaign Chair and Treasurer.

We have provided a below but each ministry/agency/OPP is different, so take the below suggestion and adapt it to your specific needs.

Sample Campaign Structure



So, what do all these people do and how many volunteers do you need? See below for an outline.

Executive Campaign Lead: oversees the ministry/agency/OPP Campaign Chair and provides leadership support. The Campaign Chair reports to the Executive Lead as well as Federated Health Charities staff. Number of people needed: 1.

Campaign Chair: plans, implements, and supports the ministry/agency/OPP campaign. The Campaign Chair is the main point of contact for Federated Health Charities staff. Number of people needed: 1.

Campaign Executive Team: works closely with the Campaign Chair to plan and oversee all aspects of the ministry/agency/OPP campaign. Your executive team should include a Treasurer, Special Events Coordinator, and Canvasser Coordinator to oversee these specific components of the campaign (finances, ministry/agency/OPP-wide events, canvassing). Number of people needed: 1 per role, however, some teams find it helpful to have two Special Events Coordinators if you plan to hold several ministry/agency/OPP-wide events.

Campaign Treasurer: responsible for managing and reconciling campaign funds for the ministry/agency/OPP campaign, and submitting the financial information to Federated Health Charities staff. Number of people needed: 1.

Special Events Coordinator: responsible for ministry/agency/OPP-wide events, and providing support to regional/branch-level events as required. Number of people needed: 1. Some teams may find it helpful to have two Special Events Coordinators if event plans require additional support.

Canvassing Coordinator: responsible for coordinating canvassing efforts across their ministry/agency/OPP and supporting regional/branch canvassers. Number of people needed: 1.

Divisional/Regional Lead: oversees volunteers and canvassers within a division or region. Responsible for leading canvassers, sharing experiences and best practices, and compiling financial reports and submissions to the Campaign Chair and Treasurer. The Divisional/Regional Lead acts as the campaign chair for their division/region. Number of people needed: 1 per division/region. Smaller ministries/agencies may not require Divisional Leads and can skip this step.

Canvassers/Volunteers: responsible for promoting the campaign, distributing campaign materials, canvassing employees, and organizing local office events. Number of people needed: this will depend on the size of your organization. We generally recommend one volunteer per 20 staff, so if an office has 60 staff members, we recommend recruiting three volunteers.

5. BEST PRACTICES FOR RUNNING A CAMPAIGN

Chairs Checklist for Managing the Campaign

- ☐ Meet with Federated Health Charities staff for your initial training and to discuss how we can help support your campaign.
- ☐ Identify Campaign Executive Team: Special Events Coordinator, Treasurer, Canvasser Coordinator.
- ☐ Email Federated Health Charities to arrange training for your Campaign Executive Team.
- ☐ Work with Campaign Executive Team to plan your province-wide campaign (goals, timelines, themes, plans).
- ☐ Identify Divisional/Regional Leads for the campaign (as required, depending on the size and number of workplaces in your ministry/agency/OPP).
- ☐ Ensure Divisional Leads understand the campaign reporting structure, as required (Federated Health Charities staff can conduct training if needed).
- ☐ Recruit canvassers and volunteers for all Divisional/Regional sites (this can take time, so start this early).
- ☐ Ensure Divisional/Regional Leads and volunteers are familiar with the Federated Health Charities tools and resources available through the Federated Health Charities website.
- ☐ Arrange Training for your Divisional/Agency Leads and volunteers, as required.
- ☐ Order campaign materials (if you need hard copy versions, please email Federated Health Charities) or obtain the electronic campaign promotional materials and prepare your communications and promotions plan.
- ☐ Set up a regular touchpoint with your Executive Team, and your Divisional/Agency Leads and volunteers throughout the campaign to support your team and provide communications updates on the progress of the campaign.
- ☐ Provide regular updates and reports to the Federated Health Charities staff.

Planning Your Campaign

Once you have your team together, it's time to plan your campaign. You will want to start planning as soon as you have your Executive Team in place. You do not need to have all your Divisional/Regional 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, trivia contests, etc.)
- Federated Health Charities Lottery ticket sales
- A wrap event to celebrate your success and thank those responsible for it, and
- Volunteer appreciation.

A fillable campaign calendar can be found on our website (6-week or 8-week versions available) to assist you in laying out your campaign plans.

As an Executive Team, you'll want to discuss:

- Participation and financial goals for your campaign (see below for more information).
- When your campaign will begin and end, and timelines within those dates – it is recommended that you complete the canvass first, then run special events. The official OPS-wide Federated Health Charities Campaign will kick off on April 3, 2023; all ministry/agency/OPP campaigns must end by June 30, 2023.
- How many people there are to canvass, and how you'll divide the organization up to reach them all (your Human Resources office can help with this).
- How you'll involve staff across the province in your ministry/agency/OPP campaign.
- What special events you'd like to run – especially the large ones that take a lot of planning, such as an online silent auction.
- Whether you will be running a Vacation Day Incentive Draw (see Appendix A for information on how to do this).
- How you'll involve senior leadership (see below for more information).
- 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 Charities will provide you with a goal target for this year's campaign and support to help you achieve it. Meet with [Federated Health Charities staff](#) to discuss your ministry/agency/OPP target for this year's campaign. Once you receive 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/regions, setting specific targets for each Divisional/Regional 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/OPP with regional offices/detachments face unique challenges when it comes to organizing charity campaigns. 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/online events can be a great inclusive option. Regular communication with your Divisional/Regional Leads or volunteers through weekly or bi-weekly status calls or emails will help 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, trivia etc.

Divisional/Regional Leads and/or volunteers will also 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 everyone 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 level of engagement will trickle down and signal to volunteers and staff that the campaign matters.

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 your Executive Lead by asking them to promote the campaign in their management meetings and to educate managers about the role they can play in supporting volunteers.

For example, as your ministry/agency/OPP Campaign Chair, you should arrange to brief your Senior Executive Leadership Table/Senior Management Team on your campaign plan in the month before launch. Your Executive Lead can help facilitate this. This is an opportunity to discuss what role you want senior executives and management to play in your campaign, 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 teams to involve them in branch events and play a role in fundraising initiatives.

Another effective way of engaging senior management is by sharing branch-level fundraising results midway through the campaign. It will provide managers with a sense of where they stand in comparison to the rest of the ministry or organization and encourage them to ramp up efforts, if necessary.

6. VOLUNTEERS

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, takes 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.
- Contact last year's 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/OPP-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, people volunteer to expand their professional networks, meet new people, contribute to a cause and organize office events. Try to make the experience more engaging for your volunteers by communicating with them regularly, involving them 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 the support they need. Campaign support material 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 staff can provide resources such as charity speakers, communications support, and general guidance on organizing campaign events.

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 shows an appreciation for what they've done and increases the chance of them volunteering again in the future. 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 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 staff](#) to ensure they get submitted into the Volunteer Appreciation draw that

7. COMMUNICATIONS MATERIALS & CAMPAIGN RESOURCES

Campaign Logo

To celebrate Federated Health Charities' 40th anniversary, we have updated our logo to celebrate the kindness and generosity of Ontario's public servants, past and present, in supporting Federated Health Charities:



Digital copies of our logo, as well as alternative designs and formats, are available on the [Federated Health Charities Teams channel](#). If you have specific logo needs, please email [Federated Health Charities](#).

Communications & Messaging

Please use the Federated Health Charities Communications guide to assist you in developing your campaign communications strategy. You are free to be creative with it, but the guide will help you get started with some key messaging and branding information.

If you have any questions about these materials or are looking for some help with developing a communications strategy for your campaign, please contact Kate Halloran at Kate.Halloran@Ontario.ca.

Campaign Theme & Rationale

Campaign Theme: 40 years of caring, 40 years of giving, 40 years of Federated Health.

Rationale: 2023 marks the 40th anniversary of the Federated Health Campaign, which was founded by OPS staff in 1983 to help provincial employees raise money for Ontario health charities. Over 40 years, Ontario provincial employees have raised

more than \$54 million to support the 21 organizations that make up Federated Health Charities. Our 2023 theme celebrates the compassion, generosity and commitment of Ontario's public servants over the past 40 years – whether you work at Queen's Park or Thunder Bay, in an office, in the field or as a uniformed member of law enforcement – to making our communities across our province better, stronger and healthier.

This campaign is about the compassion and commitment to public service that provincial employees demonstrate every day. It's about recognizing our history and celebrating our contributions to making Ontario better and healthier in the future. It's about the care Ontario's public servants have for the people and places of our province, and what we can achieve when we come together and give from the heart.

Please engage yourself in this year's campaign and put your heart and pride 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.

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 and emailing the completed form to Federated.Health.Charities@ontario.ca.

Donations Form

Donation forms are available in [English](#) and [French](#) and on the [Federated Health Charities website](#) for people who are not donating via WIN. A fillable electronic version of the donation form is available for online canvassing. You can also order hard copies by filling out the [Campaign Materials Order Form](#) and emailing it to Federated.Health.Charities@ontario.ca. Please ensure that volunteers have the donation form readily available and easy for donors to access.

Additional Campaign Resources

Additional campaign resources, forms, and tools that you will need to roll out your campaign can be found on the [Federated Health Charities website](#) in the [Volunteer Resources section](#). The website also has promotional materials available to assist you in promoting the campaign. You will find videos of our charities, compelling client stories, and other items in the [Volunteer Resources section](#). You are also free to create campaign resources of your own.

8. HOW TO DONATE TO FEDERATED HEALTH CHARITIES

How to Donate

Employees can donate to the campaign in four different ways:

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

Payroll Deductions and 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. Ensure all volunteers know how to explain to donors how to donate via WIN (for OPS employees), where to find donation information on the Federated Health Charities website, and where they can download a paper donation form in [English](#) and [French](#).

We strongly encourage people to use WIN to make donations. Providing a direct link to WIN and clear instructions on how to click on the "My Charity" tab on the upper left side of the WIN homepage and select "Federated Health" to make a donation (see below) can help encourage people with access to WIN to use this method to donate.

Payroll Deduction Using WIN

- Donations can be made via payroll deduction in WIN starting **April 3, 2023**, and ending **July 9, 2023**.
- Payroll deductions start on the **July 6, 2023**, 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 20, 2024**.
- 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 Ontario Shared Services (OSS) Contact Centre.
- WIN is the preferred method for donating as it removes the privacy risks associated with handling paper pledge donation forms with donor personal information.

How to Donate Using WIN

1. On the "My Charity" page in WIN and select the Federated Health Enter New Deduction link.
2. Go to the Add New Deductions page by clicking the "Add Deduction" button.
3. Enter the charities you would like to support.
 - a. You can split your donation among all 21 charities, or direct your donation to individual charities of your choice.

- b. Choose the charities of your choice and enter the amount to be deducted per pay cheque.
 - c. If you are giving to individual charities, you will repeat this step for each of your chosen charities.
4. Enter the number of pays for which the deduction will apply. Press enter.
5. Click the "Submit" button.

What are the benefits of donating through WIN?

- ☑ WIN is the most private and secure way to donate, saving time and reducing paper waste associated with paper forms.
- ☑ You can view your donation amount deduction-to-date on WIN at any time.
- ☑ Payroll donations are automatically included on your T4 slip, so you don't have to worry about a tax receipt.

Donations That Cannot Be Made Through WIN

- ☒ Donating by cash, cheque or credit card.
- ☒ Donating after the July 9, 2023, WIN cut-off date.
- ☒ Donations from employees without access to WIN.

In these cases, the donor will need to fill out a paper or electronic donation form.

Important note: provincial employees must be able to connect to their workplace intranet (either in the office or remotely via VPN) to connect to WIN and make a donation.

Paper or Electronic Pledge Form Donation Process

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.

Donation forms are available in [English](#) and [French](#) on the [Federated Health Charities website](#) for people who cannot donate via WIN. A fillable electronic version of the donation form is available for online canvassing, and you can order hard copies for your ministry/agency/OPP canvassers by filling out the [Campaign Materials Order Form](#) and sending it to Federated.Health.Charities@ontario.ca. Please ensure volunteers keep the donation form readily available and easy to access for donors.

How to Complete and Submit Paper Donation Forms

1. The 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 submits it directly to their **Campaign Treasurer**. Canvassers should ensure that they clearly communicate which person should be receiving the donation forms. Donors DO NOT submit their donation forms directly to OSS.
 - a. **Campaign Treasurers**, see "Appendix C: Submitting Donation Forms to OSS" for directions on where to send these forms.
3. If the donation is cash, cheque, or credit card, the donor submits it to the **Campaign Treasurer**. Treasurers will submit all donation forms for non-payroll donations (cash, cheque or credit card) directly to Federated Health Charities, not OSS.

4. If the donor is a Minister, MPP, Minister's Staff or Deputy Minister, the form should be submitted to the **Campaign Treasurer**.
 - **Campaign Treasurers**, see "Appendix B: Payroll Donations by Ministers, MPPs, Ministers Staff & Deputy Ministers" for direction on where to send these forms.

Payroll Cut-Off Dates

To include the full 26 payroll deductions in the year, campaign treasurers need to submit their payroll donation forms to OSS on time. OSS has set out submission deadlines for donations made via WIN and for electronic/hard copy pledge forms below. Please ensure you are mindful of these deadlines in your campaign planning.

Maximum Payroll Deductions	Cut-Off Date to Submit Paper Forms to OSS	Cut-off Date for Online Donations	First Payroll Deduction	Last Payroll Deduction
26	June 2, 2023	June 25, 2023	July 6, 2023	June 20, 2024
25	June 16, 2023	July 9, 2023	July 20, 2023	June 20, 2024

Special Events

Special events are the third way you will raise funds through your campaign.

Your Executive Team, through your Special Events Coordinator, will be responsible for planning and implementing ministry/agency/OPP-wide special events, and Division and Branch Leads will be responsible for organizing local events in their regions/workplaces. While events like samosa sales, and pizza lunches have traditionally been part of our fundraising, we recommend including virtual or hybrid events in your campaign to ensure your events are accessible and inclusive to members of your ministry/agency/OPP that are spread across the province or not able to attend in person.

There is a payment platform available on the [Federated Health Charites website](#) to manage ticket sales for your special events. The events payment platform can also be used to pay for virtual events, auctions, purchasing BINGO tickets, purchasing other goods you are selling, etc.

You can include simple instructions with each of your event promotions on how to pay to attend an event or purchase an item. For example:

If you would like to attend the [insert EVENT NAME] please purchase your ticket here. Under "Event Name" please enter [insert EVENT NAME] and under "Event Price" please enter [insert EVENT PRICE, i.e. "\$5"]. Once you have completed your purchase you will receive a confirmation email, please forward this email to [insert NAME OF PERSON WHO IS COLLECTING THE TICKETS, i.e. Example.Emailaddress@Ontario.ca].

Please ensure you are directing people to the correct place to pay for their special event tickets.

OPS-Wide Campaign Event

This year Federated Health Charities will be holding an OPS-wide campaign event featuring our popular Veruz song battle event organized by Treasury Board Secretariat (TBS).

Federated Health Charities staff will provide campaigns with more details about this even once they are confirmed but will be asking OPS campaign teams to promote this event as a chance to celebrate 40 years of the Federated Health Campaign and the wonderful generosity of Ontario's public servants.

Lottery

The final way you will raise funds for your campaign is by selling tickets to the Federated Health Charities lottery.

The lottery gives you an easy-to-run special event activity. Your ministry/agency/OPP 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 provincial employees in participating OPS ministries, agencies and the OPP.
- Tickets cannot be sold to members of the public.
- Tickets will be sold, between **April 3, 2023**, and **June 25, 2023**.
- The tickets are sold online and are first come, first served.
- Tickets can be purchased through the [Federated Health Charities website](#).

9. FINANCIAL REPORTING PROCESS

Financial Reporting – The Basics

Your ministry/agency/OPP's financial reporting process may vary depending on the size of your organization and whether it includes regional workplaces. However you choose to manage the financial reporting in your campaign, please note:

- All campaign donations, including paper pledge forms, cash, cheques and credit cards, should be sent to your ministry/agency/OPP **Campaign Treasurer**. The treasurer will forward the donation information to the appropriate office for processing (OSS or Federated Health Charities). N.B. electronic pledge forms are submitted online.
- **Canvassers/Volunteers** should never send hard copies directly to Federated Health Charities. All materials must go through your **Campaign Treasurer**.
- Financial submissions and reporting should be sent to your **Campaign Treasurer** on a weekly basis.
- Donations, including paper pledge forms, cash, cheques and credit cards, should be submitted to your **Campaign Treasurer** each week.
- Do not hold donations until the end of your campaign. Donors expect their donations to be processed promptly, particularly cheques and credit cards, to be processed promptly.

- Ensure all volunteers and donors know where to email their donation forms (i.e. your ministry/agency/OPP **Campaign Treasurer** or **Divisional/Regional Lead**).

Financial Reporting Process for Ministry/Agency/OPP Campaign Treasurer

The Campaign Treasurer:

- Receives all funds, verifies the financial reconciliation process, and inputs results by division.
- Stores pledge/donation forms in a safe and secure place (i.e. a locked office, cabinet or drawer) until materials are submitted to Federated Health Charities.
- N.B. 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.
- Verifies that all the pledge/donation forms, cash, and cheques noted by canvassers are accurate.
- Transfers all cheques, cash, and donation forms with a completed Donations Envelope Cover Sheet (see Appendix C) tracking its contents to Federated Health Charities each week using a secure method.
- Sends the **Campaign Chair** and **Executive Team** a weekly overall financial update on the progress of your ministry/agency/OPP campaign.

If the ministry/agency/OPP campaign has a charity bank account, the Campaign Treasurer is also responsible for ensuring that all cash donations noted as deposited in the account are accurate. If there are discrepancies or funds have been received without instructions on what they represent, follow up directly with the canvasser/volunteer who submitted the funds.

Process for Divisional/Regional Leads (Where Applicable)

The Divisional/Regional Leads:

- Ensure pledge/donation forms are completed correctly.
- Receive all event dollars from **Canvassers/Volunteers**.
- Complete the submission package that contains all pledge/donation forms, cheques, and cash (if applicable) with the Donations Envelope Cover Sheet (see Appendix C) tracking its contents, and deliver it to the ministry/agency/OPP **Campaign Treasurer**.

If your ministry/agency/OPP has a charity bank account, Divisional/Regional Leads are responsible for completing a bank deposit slip and depositing all cash in the account. The **Campaign Treasurer** will be notified that a deposit has been made and the purpose of the funds.

If the ministry/agency/OPP does not have a charity bank account, Divisional/Regional Leads deliver cash and a completed Donations Envelope Cover Sheet (see Appendix C) to the **Campaign Treasurer** using a secure method. Do not

put cash in interoffice mail. Do not deposit cash in a personal bank account and transfer it to the **Campaign Treasurer**.

Financial Reporting Process for Volunteers/Canvassers

Canvassers/Volunteers canvass for donations, run events and promote lottery ticket sales in their workplaces.

Canvassers/Volunteers:

- Store paper pledge/donation forms, cash, and cheques in a safe and secure place (i.e. a locked office, cabinet or drawer) until submitted to the **Divisional/Regional Lead** or directly to the **Campaign Treasurer** if there is no Divisional Lead.
- N.B. pledge/donation forms contain personal donor information and must always be treated as confidential. Canvassers/Volunteers must not share, copy, or track paper pledge/donation forms and/or the personal donor information contained on them.
- Give all paper pledge/donation forms, cheques and event dollars to the **Divisional/Regional Lead** or directly to the **Campaign Treasurer** if there is no Divisional/Regional Lead, on a weekly basis.

10. CASH MANAGEMENT

The **Campaign Treasurer** is responsible for establishing the process for handling any cash that comes in, and communicating this process to all members of the **Executive Team**, **Divisional/Regional Leads**, and **Canvassers/Volunteers**.

Although virtual and hybrid campaigns will likely not involve handling cash, it is important to know how to manage donations and/or funds raised by cash and cheque. How your campaign handles cash will depend on whether your ministry/agency/OPP has a bank account for campaign use. Please reach out to the **Campaign Treasurer** and/or **Executive Team** from last year's Federated Health Charities campaign to find out if a bank account is available.

Handling Cash Where There Is No Bank Account

- One-time donations can be made through the [Federated Health Charities website](#), by credit card, a mailed-in cheque, or by electronic fund transfer (EFT) to Federated Health Charities.
- Payment for special events can be made through the payment platform on the Federated Health Charities website.
- If you receive cash, contact Tatyana Parfenyuk at Tatyana.Parfenyuk@ontario.ca about how to forward the funds to Federated Health Charities.

Handling Cash Where There Is a Bank Account For This Purpose

- The **Campaign Treasurer** should draft a process and information for depositing funds into your campaign bank account and share/review this information with all **Divisional/Regional Leads**.

- The **Campaign Treasurer** will need to determine the information flow to allow them to reconcile deposits, such as having **Divisional/Regional Leads** email the treasurer their deposit slips; or creating a form to submit whenever funds are deposited, specifying the amount and purpose of the deposit.
- The **Executive Team** and **Campaign Treasurer** will need to determine who is the current signing officer(s) on the account (often the previous year's treasurer and/or Campaign Chair).
- If possible, update the signing officer on the account to the current **Campaign Treasurer** and/or **Campaign Chair**.
- 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 for assistance with the support letter.

Handling Donations Made by Cheque or Credit Card

The **Campaign Treasurer** is responsible for determining how donations made by cheque and credit card will be stored until they can be submitted to Federated Health Charities. We recommend that all campaign funds and materials containing personal information (i.e. paper pledge/donation forms, cash and cheques) are stored in a safe and secure place such as a locked office, cabinet or drawer.

11. TRACKING YOUR CAMPAIGN PROGRESS

The **Campaign Treasurer** is responsible for tracking the progress of the ministry/agency/OPP campaign. This will involve reconciling data from a couple of different places to present an overall running total for your campaign: COGNOS pledge totals, cash donations received, revenue from special events, and lottery ticket sales. The **Campaign Treasurer** should reconcile these totals every week to provide the **Chair** and **Executive Team** with an up-to-date running total of their progress, which can be shared with **Divisional/Regional Leads** and **campaign volunteers**. Having a sense of whether or not their efforts are having an effect 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 available online to the Campaign Chairs and Treasurers through COGNOS. Updated reports will be available online throughout the campaign, ending July 31, 2023.

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. Instructions on how to apply for COGNOS access are available on the Federated Health Charities website. Please contact Tatyana Parfenyuk at Tatyana.Parfenyuk@ontario.ca for assistance if you need help with your application.

The weekly report will contain detailed pledge donations for your ministry/agency/OPP, broken down by "Department" – the COGNOS report cannot provide data by division so the **Campaign Treasurer** will have to determine that information manually.

COGNOS reports detail the donations made each week through payroll donations and are cumulative.

12. TAX RECEIPTS

Canada Revenue Agency Guidelines

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 that are eligible for a tax receipt:

- Payroll pledges of \$25 or more
- One-time donations made by cash, cheque, or credit card of \$25 or more.

Donations NOT eligible for a tax receipt:

- Special events participation, such as admission tickets, participation fees, bake sales, etc.
- Lottery ticket purchases
- Donation of vacation days by leadership.

Visit the [Tax Receipting Guide](#) for more detailed information regarding tax receipting.

13. PRIVACY

Privacy of Donor Information

Protecting personal information and privacy is a priority for both Federated Health Charities and the Government of Ontario. 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 Campaign Executive Team who will deal with personal information.
- ☐ Ensure that all campaign volunteers clearly understand the need to keep personal information confidential and that all personal information provided during the campaign is used only for the Federated Health Charities campaign.
- ☐ Do not include any personal information when reporting on donations and/or fundraising results, and ensure that all reporting on donations is anonymized so that individual donors cannot be identified.
- ☐ Ensure that paper pledge forms with donation information are always stored securely (such as in a locked drawer, cabinet or office) and sent to Campaign Treasurer by secure means on a weekly basis. Do not hold these forms (and proceeds from events) until the end of the campaign.
- ☐ Do not maintain a 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 files from past campaigns, delete or destroy the information.

Privacy Considerations Throughout Your Campaign

The privacy of our donors and campaign participants is of utmost importance to Federated Health Charities. While we aim to support each campaign's fundraising initiatives, we need to prioritize the privacy of our donors and will honour that privacy above all else.

Please review the privacy parameters below that should be considered by campaign teams throughout campaign planning.

Incentive Draws: Federated Health Charities will conduct the draw for your incentive programs. We are not able to provide you with a list of donors so you can conduct the draw yourself. Once we have conducted the draw, we will contact the winners to seek their consent to release their name to the campaign team for publication as the winner. If the donor decline to 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 Charities 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."

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 tickets 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 inform participants that by making a pledge they will automatically be entered into campaign incentive draws or activities with an option to opt-out, such as "By making this pledge you will be included in additional campaign incentive activities. If you do not wish to be included, please contact [INSERT CONTACT NAME]." 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 donors 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 [INSERT CONTACT NAME]." You will want to appoint someone on your team to be the contact person for these requests.

Canvassing: Federated Health Charities cannot release lists of donor names to your campaign team. Likewise, we will not confirm whether specific employees have

donated. If you have concerns with your COGNOS report and whether the appropriate employees are appearing on it, you can submit a list of employee names to Federated Health Charities 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 in almost all participating provincial workplaces. This draw involves your senior leadership team donating vacation days for you to raffle off as an incentive for those who make a payroll pledge to the campaign. If your campaign is interested in offering this incentive, please follow the steps below.

Planning and Preparing for a Draw

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 the draw. A good place to start the process is with your **Executive Campaign Lead**.
2. Make a request with the help of your Executive Lead to your ministry/agency/OPP's Senior Executive Leadership Team/Senior Management Team (SELT/SMT) to donate vacation time (half a day, full day, multiple days, etc.) to the campaign as an incentive for payroll donations.
 - a. Ensure that people who volunteer to donate vacation time understand that they cannot receive a tax receipt for their donated day(s) as there is no defined cash value.
 - b. Reach out to SELT/SMT as early in your campaign planning as possible (i.e. as soon as you have your Executive Lead's approval to move forward) so you can give people adequate time to decide if they want to donate but also be able to include a total number of days available 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.). Generally, the larger the amount of time you are giving away (such as a week) the bigger the incentive for people to donate.
6. Determine if you will set a minimum donation to qualify, such as \$5 or \$10 per pay. You can determine your minimum donation based on the size of the prize. For example, if you are giving away one or two vacation days, you might consider setting a lower minimum donation to qualify, such as \$2/pay. If you are giving away a week (5 days) or more, consider setting a higher minimum donation such as \$5 per pay. It is up to you to determine your minimum donation as different workplaces will have different incentives, but the key is to make it relative to the prize to incentivize donors to give more if they want the chance to win more.
7. Connect with your ministry/agency/OPP 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 in each ministry,

agency, etc. so ensure you talk to your human resources team to determine the restrictions 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 on how well you communicate it. Have a clear plan before you begin communicating. This includes 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 everyone on your campaign team (including canvassers) has this information so that everyone is promoting the draw accurately.

N.B. – we recommend that you require people must make their donations via WIN to qualify for the vacation days draw. This allows Federated Health Charities to conduct the draw in a timely manner. Including the paper pledge forms will add several weeks to the timeline to select the winner(s), as it takes several weeks for OSS to process the paper forms.

Conducting the Draw

Once you have successfully planned and launched your incentive draw, please follow the steps below to set up the draw to select the winner(s):

1. The team at Federated Health Charities conducts the actual draw. This allows donations to remain private. It also means you don't have to do the work to track and organize the actual draw.
2. Contact [Sarah Wood](#) and [Tatyana Parfenyuk](#) at Federated Health Charities to let them know you plan to conduct a draw, including how many winners you need to be drawn, your minimum donation, and your donation deadline. Federated Health Charities will use this data to pull donors from the database and randomly select the winner(s). Federated Health Charities will notify you of the winner(s) so you can announce it.
3. Federated Health Charities can let you know when we will be able to determine your winner(s) and when you can expect to announce the result based on your donation deadline. Please contact [Federated Health Charities](#) before you promote a date to announce the winner(s) of the vacation days draw 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 Federated Health Charities has selected the 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. People who have donated vacation time 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 step, the people who have donated the time have completed their donation.

2. Your Executive Campaign Lead will issue a letter to the manager of the winner that states the number of days they have won and any restrictions around using the days (as determined by your human resources office). 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 winner's WIN. The manager will receive the letter and the winner will coordinate with their manager regarding using the days. This accomplishes the task of "awarding the days".

APPENDIX B

Payroll Donations by Ministers, MPPs, Minister's Staff & Deputy Ministers

Ministers and MPP Pledge Forms

Forms completed by ministers and MPPs should be forwarded to:

[Merle Chadee](#)

Manager, Pay & Benefits – Human Resources
Whitney Block, Rm 2420
99 Wellesley Street West
Toronto ON M7A 1A2

Contact: 416-212-7239

mchadee@ola.org

Ministers' Staff Pledge Forms

Pledge forms completed by ministers' staff should be forwarded to:

[Agnes Bedorf](#)

HR Business Advisor
Cabinet Office
438 University Avenue, 11th floor
Toronto, ON M5G 2K8

Contact: 647-201-1573

agnes.bedorf@ontario.ca

Deputy Ministers Pledge Forms

Pledge forms completed by Deputy Ministers should be forwarded to:

[Kerry Naabeh](#)

Coordinator, Deputy Minister Payroll & Pension
Leadership Practices Branch
Treasury Board Secretariat
12th Floor, Suite 1203
595 Bay Street
Toronto, ON M5G 2C2

Contact: 416-325-8658

kerry.naabeh@ontario.ca

APPENDIX C

Submitting Donations Forms to OSS

Campaign Treasurers will submit all payroll-based donation forms to the appropriate OSS payroll centre.

If you are unsure which payroll centre handles an employee's forms you can confirm here.

The payroll centres are:

- GTA – oss.payroll.gta@ontario.ca
- North Bay – oss.payroll.northbay@ontario.ca
- Orillia – oss.payroll.orillia@ontario.ca
- Thunder Bay – oss.payroll.thunderbay@ontario.ca
-

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



Sarah Wood
Executive Director
Federated Health Charities



Ian Freeman
Assistant Deputy Minister
Ministry of Transportation
Honourary Chair
Federated Health Charities Campaign