

Federated  
**Health Charities**

## Campaign Information Package

Agency Campaign Chairs & Executive Team Members

# Welcome to the Federated Health Charities Campaign!

This guide contains information to help campaign chairs and executive team members plan their campaigns. A campaign guide for volunteers and additional resources are available at <https://federatedhealth.ca/campaign-resources/>.

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# 1. FEDERATED HEALTH CHARITIES – WHO ARE WE?

## Mission statement

Federated Health Charities is a not-for-profit corporation dedicated to raising funds within the Ontario Public Service that go to support 21 charities delivering health education and awareness, medical research, and client and patient services in communities across Ontario.

## The annual Federated Health Charities Campaign

The Federated Health Charities Campaign is a workplace charitable campaign that allows employees in participating Ontario government ministries, agencies, and the Ontario Provincial Police (OPP) to support up to 21 health charities through payroll deductions, one-time donations, special events, and an annual lottery.

For more than 40 years, provincial employees from the Ontario Public Service (OPS), the OPP, and participating provincial agencies have come together each year to help run our annual campaign, volunteering their time, skills, and creativity to make our campaign a success. All funds raised through the campaign go to support the work of our 21 charities, providing life-saving research, innovative health education and awareness programs, and essential patient support services to people in communities all across Ontario.

## Federated Health Charities' 21 participating charities

- [ALS Society of Canada](#)
- [Alzheimer Society of Ontario](#)
- [Arthritis Society Canada](#)
- [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 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:

Federated Health Charities staff (general enquiries, communications, and support)  
[Federated.Health.Charities@Ontario.ca](mailto:Federated.Health.Charities@Ontario.ca)

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

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

You can also connect with the Federated Health Charities team on our [Microsoft Teams channel](#), 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), volunteers and social media ambassadors to provide training on how best to complete their role and achieve success. Contact [Sarah Wood](#) to schedule this training.

### Charities participation

Our 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 learn more.

### Federated Health Charities Charitable Registration Number

Federated Health Charities Corporation's Charitable Registration Number is 85413 5480 RR0001.

### 3. CAMPAIGN BASICS

#### Key dates

When planning your campaign, please note that in order for payroll deductions to begin on the first pay date of July:

- All fundraising must be complete by end of June
- All campaign submissions must be submitted by end of June.

Agencies that do not use WIN for payroll may have additional flexibility around dates. Please contact [Sarah Wood](#) for more information.

DATE	EVENT
Feb. – March 2024	Business Process and Campaign Planning Training Sessions (Campaign Chairs, Executive Teams) & Recruitment of Campaign Volunteers
April 1, 2024	WIN opens for online payroll donations
April 1, 2024	Federated Health Charities campaign begins
April 1, 2024	First day of lottery ticket sales
April 8, 2024	First WIN financial report available on COGNOS to ministries and on WIN
June 12, 2024	Verzuz song battle campaign event
Mid-June	Campaigns begin winding down and preparing submissions
June 21, 2024	Last day to donate using a paper pledge form
June 24, 2024	Last day of online lottery ticket sales
June 28, 2024	Federated Health Charities campaign wrap & lottery draw
July 4, 2024	First payroll deduction date
July 7, 2024	Last day to make an online payroll donation through WIN
Mid-July	Last day to submit event dollars
August 5, 2024	Last report WIN report available in COGNOS

## 4. STRUCTURING YOUR CAMPAIGN AND REPORTING

### Structuring Your Campaign

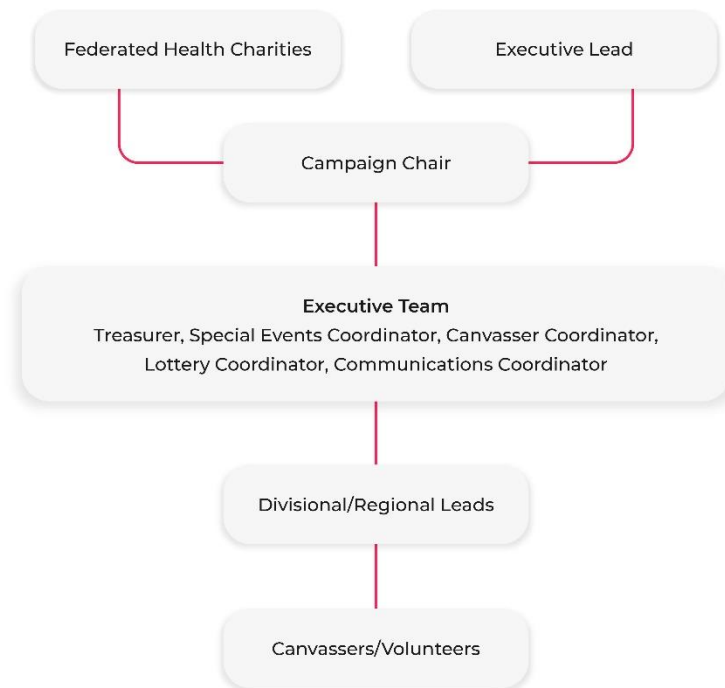
When you are ready to begin building your campaign team (this can take time so start early), you will want to know how many volunteers you need and for what roles you will need to fill.

First and foremost, volunteers are needed in each of your agency's workplaces (division, branch, office, etc. depending on your structure) to canvass staff, run special events, sell lottery tickets, and send out campaign communications. It helps to have a lead volunteer for each division or region within your agency (if applicable) to oversee volunteers at the local level, and compile and submit financial reports to the campaign chair and treasurer.

We have provided a suggested organizational chart for your campaign below. Keep in mind that each agency is different, so feel free to adapt the proposed structure below to your specific needs.



### Sample Campaign Structure



**Executive Campaign Lead** (sometimes referred to as the executive sponsor): supports and advises the campaign chair and acts as a liaison for your campaign with senior leadership.

**Campaign Chair:** plans, implements, and leads your campaign. The campaign is the main point of contact between your agency's campaign and Federated Health Charities.

**Campaign Executive Team:** works with the campaign chair to plan and execute your campaign. Your executive team should include a treasurer, special events coordinator, canvasser coordinator, lottery coordinator, and communications coordinator to oversee these specific components of the campaign. Normally, one person is required to for each role.

**Treasurer:** manages the campaigns funds, tracks the campaign's progress towards its fundraising goals, and submits financial information to Federated Health Charities.

**Special Events Coordinator:** plans fundraising events for your campaign and supports event-planning at the divisional/regional/branch level as needed. You may find it helpful to recruit more than one person for this role, depending on the size and structure of your agency.

**Canvasser Coordinator:** coordinates canvassing and helps recruit volunteers across your agency.

**Lottery Coordinator:** works with the canvasser coordinator and special events coordinator to promote lottery ticket sales as part of your campaign's communications and canvassing strategy.

**Communications Coordinator** works with your executive campaign team and the communications team at Federated Health Charities to promote the campaign, develop communications products and messaging to support your campaign, help boost Federated Health Charities campaign content on social media platforms such as Facebook and LinkedIn, and recruit social media ambassadors to help promote your campaign activities.

**Divisional/Regional Leads:** oversees volunteers and canvassers within a division or region and acts as liaison between regional and branch-level campaigns and the executive campaign team, including reporting to the campaign chair and treasurer on local campaign fundraising and finances. Normally one lead is required for each division or region within your agency. This role may not be required in smaller or more centralized agencies.

**Volunteers:** canvass employees, sell lottery tickets, distribute campaign materials, plan local events, and help promote the campaign. The total number of volunteers required will depend on the size of your agency. We generally recommend one volunteer per 20 staff, so if an office has 60 staff members, we recommend recruiting three volunteers.



## Reporting structure

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

- Regional/Divisional campaigns report updates and financial results to the agency campaign chair and treasurer
- Campaign chair and treasurer compile the overall results for the agency and report them to Federated Health Charities and their executive lead.

If your chair and executive team need campaign support, please reach out to [Federated Health Charities](#). Your agency's executive lead may want you to share your campaign plan with Federated Health Charities for review as well.

## 5. BEST PRACTICES FOR RUNNING A CAMPAIGN

### Chair's campaign management checklist

- Meet with Federated Health Charities for your initial training and to discuss how we can help support your campaign
- Identify Campaign Executive Team: treasurer, special events coordinator, lottery coordinator, communications coordinator, and canvasser coordinator
- Recruit volunteers for all workplaces within your agency (this can take time, so start this early)
- Identify divisional/regional leads for the campaign, as required
- Email Federated Health Charities to arrange training for your executive team and volunteers, as required
- Work with your executive team to plan your agency campaign (goals, timelines, themes, etc.)
- Share the campaign resources available through the Federated Health Charities website with all members of your campaign
- Order campaign materials: if you need hard copy versions of campaign brochures or posters, please email [Federated Health Charities](#); digital campaign materials are available on the [Federated Health Charities website](#)
- Set up a regular touchpoint with your executive team, divisional leads, and volunteers to support your team and provide updates on your progress through the campaign
- Provide regular updates and reports to Federated Health Charities on your progress

### Planning your campaign

Once you have your executive team together, it's time to plan your campaign. You do not need to have all your divisional/regional Leads and volunteers in place before you begin planning. [Six-](#) or [eight-week](#) fillable campaign calendars are available on the [Federated Health Charities website](#) to help you plan your campaign.

Campaigns typically 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.)
- Lottery ticket sales
- A wrap event to celebrate your success and thank those responsible for it, and
- Volunteer appreciation.

Things you will want to discuss as a team:

- Participation and financial goals for your campaign
- Campaign start and end dates (the Federated Health Charities campaign will begin April 1, 2024, and June 28, 2024)
- How many volunteers you will need, and how you'll organize your campaign to canvass all the workplaces in your agency (your Human Resources office can help with this)
- How you'll involve agency staff across the province in your 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 want to run a Vacation Day Incentive Draw (for more information, please see the Vacation Day Incentive Draws Guide on the Federated Health Charities website on the [Campaign Resources](#) page)
- How to involve senior leadership in your campaign, and
- How you'll thank your volunteers.

Canvassing staff in your agency to encourage them to make a payroll pledge to donate to Federated Health Charities is, by far, where you will raise most of your funds. It's a good idea to plan your campaign with a strong focus on canvassing and encouraging pledges at the start. Then, once the canvassing is complete, you can use special events as an opportunity to remind people to make their payroll pledges, as well as promote other Federated Health Charities activities, like the lottery.

## Goal setting

Federated Health Charities will provide you with a goal target for this year's campaign and support to help you achieve it. Start by setting up a meeting with [Federated Health Charities](#) to discuss your agency's target for this year's campaign. Once you receive your target, you will want to plan how to reach it. This will involve setting a budget that includes your fundraising goals for payroll pledges, donations, special events, and lottery ticket sales. It can also be helpful to break down your overall target by divisions/regions and set specific targets for each.

## Communicating with regional offices

Ministries with offices spread out across the province can face challenges when it comes to organizing their campaigns, which can leave regional offices feeling disconnected. When planning your campaign, think about how you can create activities that are inclusive and will appeal to staff no matter where they are located, such as virtual or hybrid events. As a member of the executive team, regular communication with divisional/regional leads and volunteers are essential. Setting regular meetings with divisional/regional volunteers is a great way to share

information and best practices, promote accountability, and keep your campaign on track.

Divisional/Regional leads and volunteers will also want to know how they are doing compared to other parts of your agency. This sense of friendly competition can be a good way to keep everyone engaged. Consider ways to share real-time updates on campaign progress so everyone knows how they are progressing towards their targets. This will help to keep your momentum going and make all offices feel they are a part of the larger campaign.

Suggestions for how to make virtual events more inclusive for regional and remote staff:

- Always include a virtual option for all events
- Include non-location-specific prizes in all raffles and give-aways, like gift cards for national chains or online retailers
- Prioritize activities like vacation day draws, online games, etc. that are accessible to all staff regardless of location.

## Engaging senior management—help them help you!

Senior managers play an important role in supporting the campaign and volunteers. Their level of engagement will trickle down and signal to volunteers and staff that the campaign matters, so it is important to get your agency's leaders actively involved in your campaign.

Your executive lead will be your primary point of contact with your agency's senior leadership team. They will help you to develop your campaign plan and act as a champion for your campaign and a liaison between the executive team and your agency's senior leaders. Encourage your executive lead to promote the campaign in their leadership meetings and encourage other agency leaders to support the campaign.

For example, as campaign chair, you should ask your executive lead to arrange for you to brief your Senior Executive Leadership Table/Senior Management Team on your campaign plan in the month before your campaign launches. 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, so be specific about how.

As part of training your volunteers, encourage them to reach out to their managers to involve them in branch events and fundraising initiatives. Sharing the fundraising results for each branch at the midpoint in your campaign can also help spur engagement by giving managers with a sense of where their teams stand in comparison to the rest of the agency.

## 6. VOLUNTEERS

### Recruiting volunteers

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

- Think back to last year's campaign— was there anyone who stood out in terms of participating and engaging others? Perhaps they can take on a more involved role this year
- Use your agency's internal communications channels to put out a call for volunteers. Be sure to highlight the benefits of volunteering, such as expanding your network, honing leadership skills, helping a cause, etc.
- Get a list of volunteers from previous years and ask them if they would be interested in participating again (last year's campaign team should be able to provide you with a list of their volunteers)
- Include a call to appoint or suggest volunteers in your presentation to your agency's senior leadership
- As a last resort, ask each division or region to appoint a volunteer (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. People who volunteer are often interested in expanding their professional networks, meeting new people, and contributing to a cause. Try to make volunteering more engaging, communicate with them regularly, involve them in campaign planning, educate them on the charities and causes the campaign supports, and most importantly, make sure you are recognizing and thanking them for their work at every step of the way.

### Training supporting your volunteers

Employees are giving their time to the campaign on top of their regular job duties, so try to make their job as easy as possible by giving them the support they need. Campaign materials can be found on the [Federated Health Charities website](#), including:

- 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.

Federated Health Charities can also provide resources such as charity speakers, communications support, and general guidance on organizing campaign events.

## Volunteer recognition

Finding meaningful ways to recognize your volunteers during and after your campaign shows an appreciation for their time and effort and increases the chance they will volunteer 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 your campaign communications
- Highlight the work of standout volunteers to their managers and senior leadership
- Use hand-written letters to thank your volunteers
- Ask your executive lead to reach out and acknowledge 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
- Submit the names of all your volunteer to [Federated Health Charities](#) so that we can thank them for their hard work.

## 7. COMMUNICATIONS MATERIALS & CAMPAIGN RESOURCES

### Communications and messaging

Federated Health Charities has prepared a communications guide to help you develop your campaign communications strategy. The guide will help you and your communications lead get started developing your communications strategy with some key messaging and branding information. You can download a copy of the communications guide at [Campaign Resources - Federated Health Charities](#).

If you need assistance with developing a communications strategy for your campaign, please email [Federated.Health.Charities@ontario.ca](mailto:Federated.Health.Charities@ontario.ca) to connect with our communications team.

### Campaign materials

Electronic copies of the official Federated Health Charities [campaign brochure](#) and [poster](#) are [available on our website](#).

You can also order paper copies by filling out the [campaign materials order form](#) and emailing it to [Federated.Health.Charities@ontario.ca](mailto:Federated.Health.Charities@ontario.ca). If you are planning to order hard copies, please include 5-10 business days for delivery in your planning.

### Donations form

Donation forms are available in [English](#) and [French](#) and on the [Federated Health Charities website](#) for people who would prefer not to donate via WIN. You can also order hard copies by filling out the [Campaign Materials Order Form](#) and emailing it to [Federated.Health.Charities@ontario.ca](mailto:Federated.Health.Charities@ontario.ca).

Please ensure that volunteers have donation forms on hand when canvassing their workplace. If you are planning to order hard copies, please include 5-10 business days for delivery in your planning.

## Additional campaign resources

Additional campaign resources can be found on the [Federated Health Charities website](#) under the [Campaign Resources](#) tab, and you can find profiles and videos highlighting each of the 21 charities supported by the campaign under the [Charities tab](#). Feel free to look through [our blog](#) for stories about previous campaigns and health issues of interest to our donors.

If you have any questions about where to find campaign resources, please reach out to Federated Health Charities' communications team by emailing [Federated.Health.Charities@ontario.ca](mailto:Federated.Health.Charities@ontario.ca).

## 8. HOW TO DONATE TO FEDERATED HEALTH CHARITIES

There are four different ways to donate to Federated Health Charities:

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

### Payroll pledges

Payroll pledges are a commitment to donate a portion of each paycheque to Federated Health Charities for a set period of time. Payroll pledges are the single biggest source of funds raised each year so your campaign should make canvassing employees to encourage them to make a payroll pledge a priority.

Employees in agencies that use WIN can make a payroll pledge by visiting WIN between [April 1](#), and [July 7, 2024](#), or filling out a donations form on the Federated Health Charities website (available in [English](#) and [French](#)).

### How to make a payroll pledge using WIN

Please note:

- WIN donations will open on [April 1](#), and close on [July 7, 2024](#)
- Payroll deductions will start with the [July 4, 2024](#), paycheque
- If you choose make donations throughout the year (for 26 pay periods), payroll deductions will end with the [June 21, 2025](#), paycheque
- Payroll pledges can be cancelled or modified by contacting the Enterprise Services (formerly Ontario Shared Services) Contact Centre—**please note that Federated Health Charities cannot make these changes for you. If someone wishes to change or cancel a payroll pledge, they must contact Enterprise Services directly.**

To donate to Federated Health Charities through WIN, please:

1. Connect to your workplace intranet (either in the office or remotely via VPN)
2. Go to the [My Charity page in WIN](#) and select the "Federated Health – Enter New Deduction" link
3. Select the "Add Deduction" button.
4. Enter the charity or charities that you wish to support in the Federated Health Charity field – click the magnifying glass for the list of charities
5. Enter the amount to be deducted per paycheque
6. Enter the number of pays for which the deduction will apply
7. Select the "Submit" button.

To donate to more than one Federated Health charity, repeat Steps 2 – 6.

To donate to all charities, select "Federated Health Charities All" in Step 3.

To automatically renew your pledge each year, leave the "Number of Pays" field blank.

We strongly encourage people who have access to the service to donate via WIN. This is the most efficient means of donating to the campaign, as funds are collected by the employer and tracked as part of each employee's T4, which means lower administration costs for our charities so that more of your donation goes to supporting the health of people in our communities.

## 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 7, 2024](#), 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.

## How to make a payroll pledge using a paper or electronic pledge form

For employees in agencies that do not use the WIN, employees can make a payroll pledge via WIN, we have donation forms that they can fill out.

1. Go to <https://federatedhealth.ca/> and select [Campaign Resources - Federated Health Charities](#)
2. Scroll down to "Donations Form Electronic Fillable" and select your preferred language ([English](#) or [French](#).)
3. Fill out the form, selecting the charity or charities you want to support, and adding the amount of your donation
4. Save a copy of your completed form to your computer
5. Email a copy of the completed form to your campaign treasurer.

Please ensure that volunteers have donation forms on hand when canvassing their workplace. If you are planning to order hard copies, please include 5-10 business days for delivery in your planning.

Donation forms are available in [English](#) and [French](#) on the [Federated Health Charities website](#) or by filling out the [Campaign Materials Order Form](#) and sending it to [Federated.Health.Charities@ontario.ca](mailto:Federated.Health.Charities@ontario.ca).

### Payroll Cut-Off Dates for Agencies on WIN

To include the full 26 payroll deductions in the year, **treasurers** need to submit their paper payroll pledge forms to Enterprise Services or their agency’s payroll department on time. Please ensure you are mindful of these deadlines in your campaign planning.

Maximum Payroll Deductions	Cut-Off Date to Submit Paper Forms	Cut-off Date for Online Donations	First Payroll Deduction	Last Payroll Deduction
26	June 7, 2024	June 23, 2024	July 4, 2024	June 21 2025
25	June 21, 2024	July 7, 2024	July 18, 2024	June 21, 2025

### One-time donations

People can also make a one-time online donation by cheque, cash, or credit card by filling out a [donation form](#) and sending it (along with the donation, if they choose to donate using cash or cheque) to your **treasurer**, or via the [Federated Health Charities website](#).

**Treasurers** will submit all donation forms for non-payroll donations (cash, cheque, or credit card) directly to Federated Health Charities, not OSS.

### Special events

Your executive team, led by your Special Events Coordinator, will be responsible for planning agency-wide special events. Divisional and regional leads will be responsible for organizing local events at the local level.

To boost the reach of your events, think about ways to include a virtual option in each event. Hosting a lunch & learn that features a samosa sale, for example, is one way to combine an in-person event and a virtual event to include people working off-site or in different regions. Work with your divisional and regional leads to create events that speak to a broad population of your agency, and don’t be afraid to reach out to Federated Health Charities or other ministries for suggestions and examples of previous events to help spark your creativity.

A payment platform will be available on the [Federated Health Charities website](#) during the campaign (April-June) to manage ticket sales for your special events. The events payment platform can also be used to pay for virtual events, auctions, and purchasing BINGO tickets and other goods you are selling. Include instructions on



how to pay to attend an event or purchase an item as part of promoting your event so people know how they can pay, such as:

If you would like to attend the [EVENT NAME] please purchase your ticket here. Under "Event Name" please enter [EVENT NAME] and under "Event Price" please enter [EVENT PRICE, i.e., "\$5"]. Once you have completed your purchase you will receive a confirmation email, please forward this email to [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.

## Federated Health Charities corporate campaign event

Federated Health Charities will be holding a campaign event featuring our popular Verzuz song battle event organized by Treasury Board Secretariat (TBS). We will be reaching out to your campaign with more details about this event once they are confirmed and asking for your help with promoting Verzuz to your agency. Check out our blog for a look at [last year's Verzuz event](#).

## Lottery

Selling lottery tickets is an easy way to raise funds towards your campaign total while canvassing your agency. Your agency will receive credit for the full amount of every ticket you sell. Lottery ticket sales can be purchased through the Federated Health Charities website at <https://www.federatedhealth-lottery.ca>.

The **lottery sales coordinator** is the member of your executive team who is responsible for promoting the lottery, supporting volunteers as they canvass to sell lottery tickets, and tracking lottery ticket sales for your agency. For example, the **lottery sales coordinator** would be responsible for incorporating lottery ticket sales into an in-person event by bringing a laptop or tablet (connected to the internet) that people can use to purchase tickets at the event.

Federated Health Charities holds the licence for the lottery and requires that all campaign volunteers adhere to the following license requirements:

- The lottery is ONLY open to provincial employees in OPS ministries, the OPP, and participating agencies
- Tickets cannot be sold to members of the public
- Tickets will be sold between **April 1, 2024**, and **June 24, 2024**
- 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 agency's financial reporting process may vary depending on the size of your organization and whether it includes regional workplaces. However, please note:

- All campaign donations, including paper pledge forms, cash, cheques, and credit cards, should be sent to your [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.
- [Volunteers](#) should never send hard copies directly to Federated Health Charities. All materials must go through your [treasurer](#).
- All executives, including the divisional/regional lead should send their financial submissions and reporting to your [treasurer](#) weekly.
- Do not hold onto donations. Donors expect their donations particularly cheques and credit cards, to be processed promptly.
- All donations, including paper payroll pledges, cash, and cheques, should be submitted to your [treasurer](#) each week.
- Ensure all volunteers and donors know where to email their donation forms (i.e., your [treasurer](#) or [divisional/regional lead](#)).

## Financial reporting process for treasurers

The [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
- Fills out the [Donations Envelope Cover Sheet](#) and submits all cheques, cash, and donation forms to Federated Health Charities each week using a secure method, and
- Sends the [chair](#) and [executive team](#) a weekly overall financial update on the progress of your agency's campaign.

If your campaign has its own bank account, the [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 volunteer who submitted the funds.

## Financial reporting process for divisional/regional leads

If your campaign team does not include divisional/regional leads, please skip this section.

Divisional/regional leads:

- Ensure pledge/donation forms are completed correctly
- Receive all event dollars from [volunteers](#), and

- Submit all pledge/donation forms, cheques, and cash (if applicable) with a completed [Donations Envelope Cover Sheet](#) to the **treasurer**.

If your campaign has its own bank account, divisional/regional leads are responsible for depositing all cash received in the account. The **treasurer** will be notified that a deposit has been made and the purpose of the funds.

If your campaign does not have a charity bank account, divisional/regional Leads must deliver cash and a completed [Donations Envelope Cover Sheet](#) to the **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 **treasurer**.

## Financial reporting process for volunteers

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

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 **treasurer**
  - N.B. pledge/donation forms contain personal donor information and must always be treated as confidential. 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 **treasurer**, on a weekly basis.

## 10. CASH MANAGEMENT

The **treasurer** is responsible for establishing the process for handling any cash that comes in and communicating this process to all members of the campaign.

Although the amount of cash collected during the campaigns has decreased over the last few years, it is important to know how to manage donations raised by cash and cheque. How your campaign handles cash will depend on whether your campaign has a bank account. Please reach out to last year's **treasurer** and/or **executive team members** find out if a bank account is available.

### Handling cash without a bank account

- One-time donations can be made through the [Federated Health Charities website](#), by credit card, cheque, or electronic fund transfer (EFT) to Federated Health Charities
- Payments 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](mailto:Tatyana.Parfenyuk@ontario.ca) about how to forward the funds to Federated Health Charities.

## Handling Cash with a bank account

- The **treasurer** should draft a process for depositing funds into the campaign bank account and share it the **executive team** and **divisional/regional leads**.
- The process for depositing fund should outline what information the **treasurer** will need to reconcile deposits, such as copies of deposit slips or an email to the treasurer, specifying the amount and purpose of the deposit.
- The **executive team** and **treasurer** will need to determine who is the current signing officer(s) on the account (often the previous year's treasurer and/or **chair**) and update it to the current **treasurer** and/or **chair**.
- Federated Health Charities will provide a letter for the bank to support switching the signing authority. Please contact Tatyana Parfenyuk at [Tatyana.Parfenyuk@ontario.ca](mailto:Tatyana.Parfenyuk@ontario.ca) for assistance with the support letter.

## Handling cheque or credit card donations

The **treasurer** is responsible for deciding how to store cheque and credit card donations 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 **treasurer** is responsible for tracking the progress of your campaign. This will involve reconciling pledge totals (on COGNOS for agencies on WIN or based on pledge forms submitted for agencies not on WIN), cash donations received, revenue from special events, and lottery ticket sales to present an overall running total for your campaign. The **treasurer** should reconcile these totals every week to provide the **chair** and **executive team** with an up-to-date running total of their progress. These totals can be shared with your campaign volunteers, executive lead, and senior management to show progress or to encourage donations and/or additional support for your campaign.

### COGNOS reports: Enterprise Services Pay & Benefits financial reports

For agencies who use WIN for payroll, Enterprise Services Pay & Benefits will make the Federated Health Charities Employee Campaign Chair Report available online to **chairs** and **treasurers** through COGNOS. The COGNOS report will be updated and available online from **April 8 to August 5, 2024**. This report shows how many people in your agency have donated via payroll pledge to your campaign. COGNOS reports detail the donations made each week through payroll donations and are cumulative.

To access the COGNOS report, the **chair** and **treasurer** must fill out an application form and submit it to Federated Health Charities for processing. Please contact Tatyana Parfenyuk at [Tatyana.Parfenyuk@ontario.ca](mailto:Tatyana.Parfenyuk@ontario.ca) for an application.

Please note, the information in the COGNOS report is broken down by "Department". Unfortunately, the COGNOS report cannot provide data by division so the **treasurer** will have to determine that information manually.

## 12. TAX RECEIPTS

### Canada Revenue Agency guidelines

Not all donations made to Federated Health Charities are eligible for tax receipts. It is important that this information is communicated correctly so donors are not misled.

Donations 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:

- Tickets and items purchased at special events, 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 who will deal with personal information.
- Ensure that all campaign volunteers 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.
- Ensure that all reporting on donations is anonymized so that individual donors cannot be identified.
- Ensure that filled-out paper pledge forms are stored securely (such as in a locked drawer, cabinet, or office) and sent to [treasurer](#) by secure means each week. Do not hold these forms (and proceeds from events) until the end of the campaign.
- Do not create a list of people who have donated (or not) to the campaign.
- 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

Federated Health Charities takes protecting the privacy of our donors and campaign participants very seriously. Please review the privacy parameters and keep this information in mind when planning your campaign.

**Campaign Incentives:** If 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 in the campaign incentive draws 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.

**Incentive Draws:** Federated Health Charities will conduct the draws for your incentive programs. We cannot 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. If the donor does not consent, we will draw another winner. Please factor in extra time for us to draw and contact the winner when planning your campaign incentives.

**Lottery:** Federated Health Charities cannot release a list of people who have purchased tickets 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” when promoting the lottery.

**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 Passport Programs:** If participating in a campaign 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. 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 cannot 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, as required.

## APPENDIX A

### Submitting donations forms to Enterprise Services

**Treasurers** for agencies using WIN for payroll will submit all payroll-based donation forms to the appropriate Enterprise Services payroll centre.

If you are unsure which payroll centre handles an employee's form, you can confirm by visiting [Pay and Benefits Service Centres](#) from a Government of Ontario network.

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



Sarah Wood  
Executive Director  
Federated Health Charities

Linda Chihab  
Assistant Deputy Minister  
Child Welfare and Protection Division  
Agency of Children, Community and  
Social Services  
Honourary Chair  
Federated Health Charities Campaign