

Campaign Chair Planning Checklist

Step-by-Step to Plan a Successful Campaign

Step 1: Meet with Federated Health Charities for training and to discuss campaign supports.

Step 2: Meet with previous year's campaign chair(s) to discuss lessons learned.

Step 3: Identify Campaign Executive (core) Team, which may include:

- Treasurer
- Special Events Coordinator
- Lottery Coordinator
- Communications Coordinator
- Canvasser/Pledge Coordinator.

Step 4: Contact Federated.health.charities@ontario.ca to schedule Executive Team training.

Step 5: Recruit volunteers/ambassadors for all divisions and/or locations within your organization. See [How to Recruit, Train and Engage Volunteers](#)

Step 6: Invite campaign volunteers to participate in a Volunteer Training Session or contact Federated.Health.Charities@ontario.ca to arrange customized training

Step 7: Review/complete the Campaign Pre-planning Checklist with the Executive Team

Step 8: Share the campaign resources available through the Federated Health Charities website with all members of your campaign.

Step 9: Order print campaign materials

- Contact Sarah.wood2@ontario.ca to order hard copy materials, including brochures, posters, and donation forms.
- Digital campaign materials are available at federatedhealth.ca.



Step 10: Set up regular touchpoint with the executive team, divisional leads and volunteers to support your team and provide updates on your progress through the campaign.

Step 11: Attend the weekly Chairs & volunteer meetings held by Federated Health Charities; forward to any volunteers interested in attending.

Step 12: Connect with Federated Health Charities regularly to provide updates and/or seek support progress.