

Pre-Campaign Planning Checklist

Step-by-Step to Plan a Successful Campaign Rollout

The most successful campaigns start planning early and meet often. Once you have your campaign team in place, these are the next steps to follow to begin planning your campaign.

Step 1: The best timing for campaign activities to occur within the agency/ministry, including:

- The length of active campaigning (typically between 4 weeks for smaller groups and 8 weeks for larger teams),
- The dates that work best, leveraging existing events such as Town Halls or Divisional Days while considering avoiding conflicting events (such as the OPS' Spring Food Drive).

Step 2: How senior leadership will support the campaign, including:

- The donation of vacation days or other prizes.
- Vocal support at events, meetings.
- Event participation, including competition between branches/divisions, sponsored activities such as dunk tanks, pie in the face or shaving beard for a specified amount of money raised.
- Communications support.
- See [Ask for Support from SMT Email template](#)

Step 3: How to involve staff and recruit volunteer teams from all locations/divisions in the campaign, including hoteling workers, remote locations and regional teams.

- See [Volunteer Recruitment Email template](#)

Step 4: Which (if any) organization-wide events will occur.

- Especially consider large events or those that require a lottery licence in the early planning stages; these take time to prepare and implement.

Step 5: Whether to include a Vacation Day Incentive Draw to encourage payroll donations.

- Incentive draws might also include work-from-home days.



Federated
Health
Charities

- Incentive draw guidelines should include input from the agency/ministry HR department. See [How to Run a Vacation Day Incentive Draw](#) for more detail.

Step 6: How to recognize volunteers, including:

- [Volunteer Appreciation Certificates](#)