



# THE ULTIMATE CHECKLIST FOR A SUCCESSFUL CAMPAIGN

- 1** Make sure you are supported by the management and the union, if applicable. (see proposed model for campaign support letter)
- 2** Form a campaign committee and share responsibilities. Ideally, your committee should include representatives from human resources, marketing/communications and IT departments. (Responsibilities include solicitation, communications, management, thanks)
- 3** Determine your campaign dates. (To cover 2 salary periods)  
From \_\_\_\_ (day) \_\_\_\_ (month)  
To \_\_\_\_ (day) \_\_\_\_ (month)
- 4** Set a financial objective and/or a participation objective, each with a growth indicator. (See your Red Cross representative)
- 5** Recruit the team of ambassadors. (1 member per 25 to 30 employees)
- 6** Train your ambassadors with the participation of the Red Cross' representative. (Plan for 30 minutes)
- 7** Organize a campaign launch event.
- 8** Invite a Red Cross volunteer to speak to your company about the impact of their colleagues donations.
- 9** Make sure that your campaign is well publicised. (Article in your intranet, campaign poster, thermometer poster, message to donors including campaign updates and testimonials, etc.)
- 10** Quickly distribute sufficient campaign material to your ambassadors.
- 11** Follow the campaign's progress. (Support the ambassadors: visits, memos, phone calls, reminders if necessary)
- 12** Organize a complementary activity to raise money (towards the end of the campaign as not to interfere with individual solicitation). (Consult the activity suggestion sheet.)
- 13** Fill out, sign and submit the Campaign director report to your Red Cross representative, not forgetting:
  - Your campaign report;
  - The donor registration forms, **except** the forms for donations by payroll deductions (deduction at source), which must be retained by the employer;
  - Cash and checks to be deposited by the Red Cross;
  - Your Red Cross representative will provide you with a report on donations by credit card.
- 14** At wrap up, share the results and thank all donors. (Use e-mailing, intranet or posting)
- 15** Thank the ambassadors. (Meeting, letter or memo)

## CONTACT US ANYTIME

Would you like to have one of our spokespersons visit your company? Do you have questions, comments, or suggestions? Feel free to email us anytime at [cmt@redcross.ca](mailto:cmt@redcross.ca).

Visit [REDCROSS.CA/WORKPLACE](http://REDCROSS.CA/WORKPLACE) to access an array of tools to help you organize a successful workplace fundraising campaign.

## CAMPAIGN MANAGEMENT TOOLS

- General donation form\*
- Great humanitarians donation form\*
- Guide to a successful workplace campaign\*
- Campaign Director report\*
- Fundraising activity suggestions\*
- Campaign support letter\*
- Thank you letter\*

## PROMOTIONAL AND INFORMATION TOOLS

A sufficient amount of materials is set with the Red Cross representative based on the number of employees and establishments. The material is dispatched as soon as possible.

Available material is:

- Red Cross PowerPoint presentation\*
- Red Cross at a glance (statistics)\*
- Online donation tax credit calculator:  
[redcross.ca/donate/donation-tax-credit-calculator](http://redcross.ca/donate/donation-tax-credit-calculator)
- Red Cross logos\*
- Campaign poster\*
- Thermometer poster\*
- "Thanks to donors" sticker (to add to campaign poster)
- Red Cross campaign and info blurbs\*
- Stories from volunteers and those helped by Red Cross (video and text formats)\*
- Video on how Red Cross helps Canadians impacted by disasters every day\*
- Table mounted flags
- Red Cross pins
- Adhesive badges

## WAYS TO GIVE

- **Payroll deduction**  
The best and easiest way to give. This type of donation increases the impact of donations by reducing processing costs.
- Cash
- Cheque
- Credit card withdrawals  
Online only on the portal assigned to the company by the Red Cross ensuring the security of transactions. (One or many withdrawals)

## TAX RECEIPT

The Red Cross will issue a tax receipt for donations of \$20 and more or if the donor asks for it. Unless requested otherwise, each receipt is mailed to the donor's home address.

## \* IMPORTANT

Material marked with an asterisk (\*) is available at:  
**[REDCROSS.CA/WORKPLACE](http://REDCROSS.CA/WORKPLACE)**

Visit **[REDCROSS.CA/WORKPLACE](http://REDCROSS.CA/WORKPLACE)**  
to access an array of tools to help you organize  
a successful workplace fundraising campaign.