



United Way of Pitt County

# Virtual Kick-off Planning Schedule

**Confirm CEO Attendance**  
 Before picking an event date, work with the CEO's team to book their time and ensure they are available to host the kick-off event(s). Great leadership inspires others!

Also consider whether your CEO would like support in scripting their speaking remarks, or would like to speak to slides.

3-5 Weeks Before

**Send Invitation**  
 Send out invitation(s), providing the web conferencing information in the booking.

**Collect RSVPs**  
 Consider tracking RSVPs, so you can get a better idea of how colleagues are responding to your invitation.

2 Weeks Before

**All Systems Go**  
 Complete an 'all systems go' run-through to test your conferencing system, presentation documents, etc. This will put your mind at ease, and may help to identify issues you can rectify before event day!

**Test Your Pledge Tool**  
 Ensure your pledge tool is ready to accept donations.

1 Week Before

Day Before

**Thank Others**  
 Send a follow-up communication to thank staff for joining your kick-off event, and encourage them to visit the pledge tool to consider making a donation.

Thank key contributors to your kick-off, too (your impact speaker, and anyone who helped you plan). They'll be pleased to be recognized!

Event Day

Follow Up

**Draft Invitation**  
 Draft up your invitation. If you need approval from others, consider starting a week earlier.

**Confirm Invite List**  
 Pull and sort your invitation list. Work with your HR department to ensure you have captured all staff. Divide up the list (e.g. by department) if you are hosting multiple events.

**Request Other Key Speakers**  
 If desired, work with your United Way staff partner to request an impact speaker, to really drive home the positive impact you're making in the community. Please submit this request as early as possible!

**Prep Your Pledge Tool**  
 If you haven't started already, take steps to get your pledge tool up and running to capture donations on event day.

**Send a Reminder**  
 Consider sending a reminder invitation or nudge, if many colleagues haven't responded to your initial invitation.

**Update the Invitation**  
 If desired, make updates to the calendar invitation to include an agenda, presentation document, list of speakers, or other key information. This update can also serve as a reminder to confirmed attendees.

**Confirm Key Speakers**  
 Ensure you have all necessary pieces to enable a successful kick-off presence for your CEO. If applicable, check in with your United Way impact speaker to ensure everything is on track, and see if they have any questions (especially about how to access your kick-off virtually).

**Prep Your Pledge Tool**  
 Check in on progress with your pledge tool. Will it be ready to go on event day?

**Last Minute Test**  
 Test your conference system and any other technology – just in case.

**Inspire!**  
 Your event is virtually 'attended' by many, and goes off without a hitch. Your entire organization is inspired to support their community and participate in this year's Campaign!

**Immediately After the Event: Send the Donation Link**  
 Now that you've inspired everyone, give them the means to support their community by sending out the donation link.

If you've hosted multiple events, send the link out after the last kick-off event has concluded.