United Way
Calgary and Area

Virtual Kickoff Planning Schedule

First

Confirm CEO attendance
Before picking an event date, work with your CEO's team to book their time and ensure they are available to host the kickoff 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

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, contractors, or others. 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 drive home the positive impact you're making in your community. Please submit this request as early as possible!

Prep your donation tool
If you haven't started already, take steps to get your online donation tool up and running to capture donations on event day and throughout your campaign.

2 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.

1 week before

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 kickoff 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 kickoff virtually).

Prep your donation tool
Check in on progress with your online donation tool. Will it be ready to go on event day? Double-check to make sure.

Day 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 donation tool
Ensure your donation tool is ready to accept donations.

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 (obviously!). 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 kickoff event has concluded.

Follow up

Thank everyone
Send a follow-up communication to thank staff for joining your kickoff event, and encourage them to visit the online donation tool to consider making a donation.

Thank key contributors to your kickoff too, like your impact speaker, and anyone who helped you plan. They'll be pleased to be recognized!