

# CHECKLIST

# CAMPAIGN KICKOFF EVENT



United Way of San Antonio  
and Bexar County

## FIRST

- Confirm CEO/Executive Leadership Attendance.** Before picking an event date, work with the CEO's team to book their time and ensure they are available to host the kickoff event(s). Also consider whether your CEO would like support in scripting their speaking remarks or would like to speak with slides.
- Decide Type of Event.** Decide whether your event(s) will be in-person, virtual or hybrid.
- Reserve Location (in-person).** Choose where to host your event(s) and reserve the space(s).

## 3-5 WEEKS BEFORE

- Draft Invitation.** Gather the details of your event. 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 reach all staff. Divide up the list (e.g. by department) if you are hosting multiple events.
- Request a United Way Speaker.** If desired, work with your United Way Representative or Loaned Executive to request a speaker share how your campaign impacts the community. Please submit this request as early as possible!
- Set up Your e-Pledge Site.** Work with your United Way Representative to help prepare your e-Pledge site.

## 2 WEEKS BEFORE

- Send Invitation.** Send out e-invitation(s), providing the date, time, location and other important details.
- Collect RSVPs.** Consider tracking RSVPs to help you determine future communications and reminders.
- Prepare CEO Remarks.** If necessary, coordinate with your CEO's script writer to prepare their remarks.

## 1 WEEK BEFORE

- Send a Reminder.** Consider sending a reminder invitation or nudge if many colleagues have not responded to your initial invitation.
- Send Latest Event Updates.** If desired, make updates to the calendar invitation to include an agenda, list of speakers and other key information. This update can also serve as a reminder to confirmed attendees.
- Confirm Key Speakers.** Confirm all speakers are prepared for the kickoff event. Finalize CEO remarks. If applicable, check in with your United Way Representative or Loaned Executive to ensure everything is on track.
- Check e-Pledge Site.** Check in on the progress of your e-Pledge site.
- Prepare Your Follow-Up Communication.** Draft your post-event email early. This will be your thank you to your event attendees. Include your ask for a pledge and how to complete their donation.

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## DAY BEFORE

- Test Your e-Pledge Site.** If applicable, ensure your e-Pledge site is ready to accept donations.
- Practice Run.** Complete a practice run to test your conferencing system, presentation documents, etc. This will help to identify issues you can rectify before event day.
- Confirm Arrangements.** Confirm all catering, event space and vendors for an in-person kickoff.
- Send Event Reminder.** Share check-in information.

## EVENT DAY

- Final Equipment Check.** Test your conferencing system and any other technology.
- Inspire!** Now is your time to shine! Your entire organization will be inspired to support their community and participate in this year's United Way Campaign!
- Send the Donation Link.** Immediately after the event, give everyone the means to support their community by sending out the e-Pledge site link. If you have hosted multiple events, send the reminder out after the last kickoff event has concluded.

## 1-2 DAYS AFTER EVENT

- Thank Attendees.** Send the follow-up communication to thank staff for joining your kickoff event and encourage them to consider making a donation. Share your company's incentives for pledging and campaign timeline.
- Thank Key Contributors.** Thank speakers and anyone who supported your event. They will be pleased to be recognized!
- Share Campaign Progress.** Share your campaign progress, remind staff of incentives and share United Way impact stories to encourage giving.
- Share Your Success on Social Media.** Share your event's success on social media and tag @unitedwaysatx!