2016 Combined Federal Campaign
"If Not You, Then Who?"

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Vice Chair: Col Kurt Kempster

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Unit Project Officer Checklist

- ☐ Attend training.
- ☐ Review list of all units/departments/personnel you are responsible to contact.
- ☐ Recruit one Keyperson to solicit 25 employees (50 max).
- ☐ Determine method of solicitation … group or one-on-one … for your units/departments.
- ☐ Attend training with your Keypeople.
- ☐ Obtain campaign materials from your Project Officer.
- ☐ Plan and hold a unit Kickoff event
- ☐ Meet with your Keypeople.
  - ▪Discuss best solicitation methods with each Keyperson.
  - ▪Using alpha rosters - distribute a list of employees each Keyperson is to contact.
  - ▪Distribute campaign materials and recognition items to each Keyperson. Use a Materials Control Log to maintain accountability.
- ☐ Support and monitor Keyperson progress.
- ☐ Brief Project Officer and/or Agency Leadership on campaign progress/problems.
- ☐ Submit weekly progress reports (paper pledges only) to your Agency Project Officer.
- ☐ Audit Keyperson envelopes and pledge cards for correctness.
  - ▪Return pledge cards with discrepancies to Keyperson for correction.
  - ▪You must ensure that all <u>No.1 copies of pledge cards are delivered to your payroll office</u>.
- ☐ Return all campaign materials to Agency Project Officer after audit is complete.
- ☐ Work with Keypeople to thank everyone. Ensure donor appreciation items are awarded.
- ☐ Prepare and distribute Keypersons "Thank You's".
- ☐ Notify your Agency Project Officer if units/departments are eligible for an award at the Recognition Luncheon (see "Recognition" section for levels).

Unit Project Officer (UPO) Guide to Success

- Develop a Unit Campaign plan. Coordinate with your Unit Commander, Leader or Supervisor to have them deliver the opening remarks at your unit/department group presentations. Ask them to send a letter, memo or email to employees endorsing the CFC (sample Leadership Messages are provided in the "Campaign Workers" tab on the CFC website: www.cfc-hawaii.org)

- Work with your Unit Commander or Supervisor to plan a unit Campaign Kickoff event.

- Publicize the campaign in your area. Display the CFC poster. Additional marketing materials can be downloaded from the "Campaign Workers" tab on the CFC website: http://www.cfc-hawaii.org/. Identify employees who have used charity services and have them speak at meetings/education sessions. Coordinate with the Planning Committee Charity Coordinator to have a charity speaker(s) attend your meeting. Keep your APO informed about your CFC events.

- **Recruit quality Keypeople**. Attend training sessions with your Keypeople before the beginning of the campaign. **It is recommended that each Keyperson be assigned no more than 25-50 individuals.**

- Manage campaign materials. Distribute campaign envelopes to Keypeople. **Accountability of all envelopes and contents is very important. Establish a control system to track the envelopes.** Use the Material Control Log in the "Campaign Workers" tab on the CFC website: www.cfc-hawaii.org. This log should be kept through March of the following year for audit purposes.

- Encourage Keypeople to arrange group meetings/presentations for employees to learn about CFC. Invite charities to speak to employees.

- Assist your Keypeople in planning special event fundraisers - bake sales, car washes, fun events toward the end of the campaign ... see "Event Ideas" under "Campaign Workers" tab on the CFC website: http://www.cfc-hawaii.org/.

- Audit all returned Keypeople campaign envelopes and carefully account for materials. Review pledge cards and final reports for completeness and accuracy.

- If any contributions were made by cash or check, verify that the deposit was made and a validated copy of the deposit slip is enclosed (you may opt to make all bank deposits yourself, this is up to you and your Keyperson--just be sure that the deposit is made in a timely manner and that the yellow, validated copy of the deposit slip is enclosed).

- **Ensure that all #1 copies of pledge cards with payroll deduction contributions have been forwarded to the correct payroll office.**

- Once you have reviewed the envelope contents for completeness and accuracy you and the Keyperson must sign and date the Keyperson's Final Report, bottom left-hand corner. The Keyperson should keep the pink copy of the report; the yellow copy will go to your agency Project Officer. Turn in completed envelopes to your agency Project Officer.

- **Report campaign progress each week to your Agency Project Officer--PLEASE DON'T WAIT TO BE CALLED!** --using the "Weekly Progress Report Worksheet for UPOs/Keypersons" in the "Campaign Workers" tab on the CFC website: http://www.cfc-hawaii.org/. Please collect the necessary information from your Keypeople prior to the weekly reporting deadlines.

- Notify your Agency Project Officer if units/departments are eligible for an Agency Award (see "Awards & Recognition" in the "Campaign Workers" tab on the CFC website: http://www.cfc-hawaii.org/) for recognition criteria.

- Assist your Keypeople in thanking all unit personnel for their time, overall support and contributions to the campaign.

Campaign Keyworkers – Backbone of the Campaign

Keyworkers are the most important element of a successful CFC – they are the backbone of the campaign.

Keyperson Responsibilities ... a Checklist

- ☐ Attend training.
- ☐ Obtain a list of employees you are to contact from your Agency Project Officer (or Unit Project Officer, if applicable).
- ☐ Have a strategy meeting with your Project Officer.
  - ▪Discuss best solicitation method for your list of employees … group and/or one-to-one.
  - ▪Obtain campaign materials
- ☐ Start your campaign on-time.
- ☐ For group solicitation, reserve room, AV equipment; request charity speaker(s).
- ☐ Prepare campaign materials according to the training session.
  - *List all of the employees you are to contact on the Keyperson Report. Work from an alpha roster to ensure that everyone has the opportunity to participate.
- ☐ Education yourself - read the FAQs - read the Preface of the Charity List.
- ☐ Complete your own pledge card first to familiarize yourself with it.
- ☐ Conduct solicitation as planned
  - ▪Personally contact all employees on your responsibility list. Ensure 100% of personnel have opportunity to make a contribution.
  - •Distribute pledge cards
  - ▪Explain advantage of payroll deduction.
  - ▪Explain opportunities for making a pledge online.
  - ▪Explain how CFC agencies provide assistance and improve the quality of life for us all.
  - ▪Thank each person for his/her time.

☐ Complete Weekly Progress Report and submit to Project Officer.

☐ Ensure that donors giving at the Eagle or Super Eagle level receive their donor appreciation item.

☐ Review each completed pledge card for correctness
- Is all writing legible?
- Is the math correct?
- Is the card signed and dated (no signature required for cash or check contributions).

Completing Your Envelopes…

☐ **YOU or your Project Officer must submit the No. 1 copy of all completed, payroll deduction, pledge cards to your payroll/finance office.** Verify with Project Officer who will be assigned this task.

☐ **YOU or your Project Officer must deposit cash and check contributions at any Bank of Hawaii branch. Deposit slip must be validated by a teller.** Place validated deposit slip in the Keyperson Envelope.

☐ Let your Project Officer know if your unit/department is eligible for special recognition – see Awards & Recognition under the "Campaign Workers" tab on the CFC web site: http://www.cfc-hawaii.org.

☐ Complete your Keyperson Final Report.

☐ Return completed Keyperson Envelopes containing the Keyperson Final Report, validated deposit slip, and the yellow copies of the pledge cards to your Project Officer.