

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 "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.