

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 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 No.1 copies of pledge cards are delivered to your payroll office.
- 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).