Lead Coordinator’s Wrap-Up Instructions

Ways to Give
Acknowledging the current state of things, for this year’s campaign we want to encourage everyone to give via online allotment or credit card donation.

When making a gift, members should include:
- The name of their current duty station
- OPFAC number – OPFAC numbers for your service units can be found in Netforum. If you do not have access to Netforum, please contact your CGMA Representative.
- Rep Site

This information is required to track campaign results. If members choose not to include this information, their gift will still be counted to the overall campaign total, but we will not be able to credit the gift to your unique Rep Site totals.

Donating by allotment remains the best and easiest way to give. To start or increase a current allotment please use the following links:

- Active Duty: https://www.cgmahq.org/donate/allotments/adAllotment.html
- Civilian Employee: https://www.cgmahq.org/donate/allotments/civDonation.html
- Retiree: https://www.cgmahq.org/donate/allotments/retAllotment.html

Note: An employee ID is required to complete an active duty allotment form. Civilian employees and Retirees must provide the last four digits of their SSN.

CGMA uses a platform called Network For Good to securely process credit card donations. If members would prefer to give by credit card they can visit: https://cgmahq.networkforgood.com/projects/94822-2020-annual-campaign-ready-relevant-responsive

Links to all these websites can be found on the campaign website www.cgmahq.org/campaign

Proceeds from Fundraising Events
If your unit held a fundraising event you may use the following options to submit those donations:

1. Zelle electronic payment - (Best Option)
   a. Login to your bank account.
   b. Look for “Zelle” or “Transfer”.
   c. Send funds to accounts@cgmahq.org.
   d. Put your Unit and Rep Site in the notes.

2. Money Order
   a. Convert any cash donations to money order. Purchase a money order using the funds collected.
   b. Make your check out to CGMA or Coast Guard Mutual Assistance.
   c. Put your Unit and Rep Site on the memo line.
   d. Send to: (temporary address for CGMA during COVID-19 stay-at-home orders)
      Attn: CGMA Campaign
      7500 Nancemond St., Springfield, VA 22150
3. Personal Check
   a. Make your check out to CGMA or Coast Guard Mutual Assistance.
   b. Put your Unit and Rep Site on the memo line.
   c. Send it to: (temporary address for CGMA during COVID-19 stay-at-home orders)
      Attn: CGMA Campaign
      7500 Nancemond St., Springfield, VA 22150

Campaign Summary Report
For donations completed online, NO FURTHER ACTION IS REQUIRED on your part. CGMA HQ will calculate those totals for your CGMA Rep Site. The summary report should only reflect those donations that were physically handed to you (hard copy pledge forms or cash donations). Instructions on completing the summary report are below. Call CGMA HQ (703.872.6711) with any questions.

☑ Checklist for Summary Report – Please complete no later than 30 June 2020

Step 1: Collect cash and hard copy pledge forms from your Local Key Workers

- Completed 2020 Key Worker Report(s) (CGMA Form 31)
- Completed Pledge Forms (CGMA Form 33)
- All checks and money orders. Be sure to safeguard contributions and all personal information.

NOTE: If you receive campaign pledges/contributions from Auxiliary, Retired or Reserve members (non-civilian employees), should be marked accordingly and do not need to be captured in your summary totals. Please mail to CGMA HQ.

Step 2: Review and verify the proper completion of Hard copy Pledge Forms (CGMA Form 33)

Ensure contribution amount is legible on all copies. Inspect the pledge forms for required information:

- Allotment and Payroll Deductions:
  - Minimum donation: $1.00
  - Last four digits of the donor’s Social Security Number or the entire Employee ID Number
  - Signature of donor

Step 3: Verify data on Key Worker 2020 Fundraising Report (CGMA Form 31)

- Verify totals and amount of money orders and checks were calculated correctly:
  - Cash Total - Amount contributed by cash or personal checks
  - Active Duty Monthly Allotments Total
    Total allotments contributed = Active Duty New + Increases
  - Civilian Payroll Bi-weekly Deductions Total
    Total deductions contributed = Civilian New + Increases
  - Fundraising Event Proceeds
Step 4: Prepare 2020 Consolidated Fundraising Report (CGMA Form 30)

The automated e-version is easy to use or you can prepare the report manually.

- **Electronically complete Form 30:**
  - Enter the CGMA site name, site number (99XXX), and your contact information
  - The form is PDF available at [www.cgmahq.org/campaign](http://www.cgmahq.org/campaign)
  - Enter the verified total amounts for Cash + Active Duty Allotment + Civilian Payroll Deductions from your Key Worker(s).
  - When you enter data, the totals will automatically process through embedded formulas.

- **Manually complete Form 30:**
  - Enter the CGMA site name, site number (99XXX), and your contact information
  - **Personnel Total:** Active Duty members and Civilian/CDC/MWR/CGES employees
  - Calculate totals for each category
  - **Grand Total**
    Total Cash + Total Active Duty Allotment + Total Civilian Payroll Deduction + Total Fundraising Activities = Grand Total
  - **Total Cash (checks, money orders)** sent to Coordinator:
    Cash + Fundraiser Activities – cost of a Money Order = Amount sent to Coordinator

**NOTE:** Convert any cash to Check or Money Order, payable to “CGMA.” Purchase a money order using the funds collected. Include the receipt.

Step 5: Submit Reports, Forms, and Donations by 30 June 2020

- **Send to report, pledge forms and checks to CGMA HQ:**
  - Completed **2020 Consolidated Fundraising Report** (CGMA Form 30)
  - **Checks and/or Money Orders** (no bills/coins)
    - Convert any cash donations to money order. Purchase a money order using the funds collected. Include the receipt.
  - All original **white** copies of **Pledge Forms** (CGMA Form 33) to CGMA HQ
Mail to:
Attn: CGMA Campaign
7500 Nancemond St.
Springfield, VA 22150

*Note: this is a temporary address for CGMA during COVID-19 stay-at-home orders*

**Retain for your records:**

- Copy of 2020 Consolidated Fundraising Report (CGMA Form 30)
- Original of 2020 Key Worker Fundraising Reports (CGMA Form 31)
- Pink copies of completed Pledge Forms (CGMA Form 33)

*Note: Donations from Auxiliary, Retired, and Reserve members should be sent to CGMA HQ and do not need to be included in your AOR tally.*

<table>
<thead>
<tr>
<th>Distribution of Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pledge Forms (CGMA Form 33)</strong></td>
</tr>
<tr>
<td>☑ Goldenrod copy — Donor Copy</td>
</tr>
<tr>
<td><strong>Return</strong> any goldenrod copies of the pledge form to the Key Worker for delivery to donor</td>
</tr>
<tr>
<td>☑ White copy — Send to CGMA HQ with Form 30</td>
</tr>
<tr>
<td>☑ Pink copy — Campaign Coordinator/CGMA Representative copy</td>
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Thank you for your diligence wrapping up the 2020 Campaign!