Coast Guard Mutual Assistance Campaign 2020

Local Key Worker’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 it to your Lead Campaign Coordinator
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 your Lead Campaign Coordinator
**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.

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☑ **Checklist – please complete no later than 12 June 2020**

- **Sort Hard Copy Pledge Forms** (CGMA Form 33) by category:
  - Categories:
    - Cash
    - Active Duty Allotments
    - Civilian Payroll Deductions

  **Note:** Donations from Auxiliary, Retired, and Reserve members should marked accordingly and do not need to be captured in your summary totals.

- Review and verify the proper completion of Hard Copy Pledge Forms (CGMA Form 33)
  - Ensure contribution amount is legible on all copies.
  - Review pledge forms for required information

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

- **Complete Form 31** (electronically or manually)
  - Enter unit contact information and list the name of your Campaign Coordinator
  - Enter total number of Active Duty members and Civilian/CDC/MWR/CGES employees
  - Enter number of contributors and amount contributed for each line item

  - **Electronically:**
    - Form is available at: [www.cgmahq.org/campaign](http://www.cgmahq.org/campaign)
    - Embedded formulas will automatically process your totals
    - Reference the comments on some of the cells (red tabs) for notes and explanations

  - **or Manually:**

    - **Calculate totals for each category:**
      - **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**
      - **Calculate the Grand Total**
        - Total Cash + Total Active Duty Allotment + Total Civilian Payroll Deduction + Total Fundraising Event Proceeds = Grand Total
Calculate total cash (checks, money orders) to be sent to Coordinator:
Cash + Fundraiser Proceeds – 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.

Send materials to your Lead Campaign Coordinator by 12 June 2020:
- Completed 2020 Key Worker Fundraising Report (CGMA Form 31)
- Checks and/or Money Orders (no cash)

Do NOT Send Key Worker Report, Pledge Forms, Checks, or Money Orders to CGMA HQ

<table>
<thead>
<tr>
<th>Distribution of Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Donor Keeps:</strong></td>
</tr>
<tr>
<td>- Goldenrod copy (bottom copy of the pledge form for their records)</td>
</tr>
<tr>
<td><strong>Send Campaign Coordinator:</strong></td>
</tr>
<tr>
<td>- White copy of pledge form</td>
</tr>
<tr>
<td>- Pink copy pledge form</td>
</tr>
<tr>
<td>- Completed Key Worker Fundraising Report (keep a copy for your records)</td>
</tr>
</tbody>
</table>

Thank you for your diligence wrapping up the 2020 Campaign!