Coast Guard Mutual Assistance Campaign 2019

Coordinator’s Wrap-Up Instructions

Campaign Coordinator,

The 2019 CGMA Fundraising Campaign is almost complete. This quick reference guide provides instructions for wrapping up the campaign. Call CGMA HQ (703.872.6711) with any questions.

✓ Checklist – Please complete no later than 15 October 2019

Step 1: Collect materials from your Key Workers

- Completed 2019 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.

Step 2: Review and verify the proper completion of 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 2019 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
  - Grand Total
    Total Cash + Total Active Duty Allotment + Total Civilian Payroll Deduction + Total Fundraising Event Proceeds = Grand Total
  - Total Cash (checks, money orders) received by Coordinator:
    Cash + Fundraiser Activities – Cost of a Money Order = Amount sent to Coordinator

Send recommendations to improve these instructions to Erica Chapman:
erica.chapman@cgmahq.org, 703.581.5297
Step 4: Prepare 2019 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.

Step 5: Submit Reports, Forms, and Donations by 15 October 2019

- **Send to report, pledge forms and checks to CGMA HQ:**
  - Completed 2019 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.
  - All original white copies of Pledge Forms (CGMA Form 33) to CGMA HQ
  - Mail to:

    Coast Guard Mutual Assistance
    1005 North Glebe Road, Suite 220
    Arlington, VA 22201

Send recommendations to improve these instructions to Erica Chapman:
erica.chapman@cgmahq.org, 703.581.5297
Retain for your records:

- Copy of 2019 Consolidated Fundraising Report (CGMA Form 30)
- Original of 2019 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.

### Distribution of Forms

<table>
<thead>
<tr>
<th>Pledge Forms (CGMA Form 33)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goldenrod copy — Donor Copy</td>
</tr>
<tr>
<td>Return 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>
</tr>
</tbody>
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Thank you for your diligence wrapping up the 2019 Campaign!