
Coast Guard Mutual Assistance Campaign 2016



Coordinator's Wrap-Up Instructions

Proud to be CGMA; It's who we are, It's what we do.

Campaign Coordinator,

The 2016 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 22 May 2016

Step 1: Collect materials from your Key Workers

- Completed *2016 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), please forward them directly to CGMA-HQ for processing. Do not include them when calculating your 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 2016 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 Continuing* + New + Increases
 - **Civilian Payroll Bi-weekly Deductions Total**
Total deductions contributed = Civilian Continuing* + New + Increases
 - **Fundraising Activities**
 - **Grand Total**
Total Cash + Total Active Duty Allotment + Total Civilian Payroll Deduction + Total Fundraising Activities = Grand Total
 - **Total Cash (checks, money orders)** received by Coordinator:
Cash + Fundraiser Activities – Cost of a Money Order = Amount sent to Coordinator

* Reference continuing allotment spreadsheet provided by CGMA-HQ

Note: Unfortunately, allotment data by unit was not available this year. CGMA will account for continuing allotments on the overall Campaign Summary Report.

Step 4: Prepare 2016 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:

- The form is an excel spreadsheet available at <http://www.cgmahqmobile.org/campaign/2016/campaign2016.html>
- Enter the verified amounts for your Key Worker(s) onto the worksheets: OPFAC (1), OPFAC (2), OPFAC (3) etc. You may wish to rename the worksheets to correspond to your Key Worker/units. The 'Coordinator' page is locked so the data should be entered on the subsequent worksheets.
- When you enter unit contributions, embedded formulas will automatically process your totals on the 'Coordinator' worksheet. Reference continuing allotment spreadsheet provided by CGMA-HQ
- Complete the **Deposit slip** (cut-off bottom of Form 30)

❑ or Manually complete Form 30:

- Enter the CGMA site name, site number (99XXX), and contact information
- **Personnel Total:** Active Duty members and Civilian/CDC/MWR/CGES employees
- **Contributors and Contribution Total:** for each line item using the data from the *2016 Key Worker Fundraising Report(s)* (CGMA Form 31)
- 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 20 May 2016

❑ Send to CGMA-HQ:

- Completed (top portion) **2016 Consolidated Fundraising Report** (CGMA Form 30)
- All original **white** copies of *Pledge Forms* (CGMA Form 33) to CGMA-HQ
- Mail to:

Coast Guard Mutual Assistance
1005 North Glebe Road, Suite 2200
Arlington, VA 22201

Send to Lockbox Address:

- **Deposit slip** (bottom portion) **2016 Consolidated Fundraising Report** (CGMA Form 30)
- **Checks** and/or **Money Orders** (no bills/coins)
- Do not send anything else to the bank lockbox; **CGMA is charged for handling extraneous documents**
- Mail campaign package to either USPS or FedEx:

USPS:

Coast Guard Mutual Assistance
PO Box 55928
Boston, MA 02205-9805

FedEx (*Courier-delivered Mail*):

Coast Guard Mutual Assistance
BOA Lockbox Services 418001
MA5-527-02-07
2 Morrissey Blvd
Dorchester, MA 02125

Retain for your records:

- Copy of *2016 Consolidated Fundraising Report* (CGMA Form 30)
- Original of *2016 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 directly to CGMA-HQ.

Distribution of Forms

Pledge Forms (CGMA Form 33)

- Goldenrod copy — Donor Copy

Return any goldenrod copies of the pledge form to the Key Worker for delivery to donor

- White copy — CGMA HQ - Action
- Pink copy — Campaign Coordinator/CGMA Representative copy

**Do NOT Send to CGMA-HQ:
Key Worker Report, Checks (other than AUX/RET/RESERVE), or Money Orders**

Thank you for your diligence wrapping up the 2016 Campaign!