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# **Coast Guard Mutual Assistance Campaign 2017**



## **Coordinator's Wrap-Up Instructions**

***Help is on the Horizon!***

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# Campaign Coordinator,

The 2017 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 25 May 2017

### Step 1: Collect materials from your Key Workers

- Completed *2017 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 for your CGMA Rep Site.

### 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 2017 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 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

\* Reference continuing allotment spreadsheet provided by CGMA-HQ

## Step 4: Prepare 2017 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.cgmahq.org/campaign/2017/campaign2017.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 *2017 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 25 May 2017

### ❑ **Send to CGMA-HQ:**

- Completed (top portion) **2017 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 220**  
**Arlington, VA 22201**

**Send to Lockbox Address:**

- **Deposit slip** (bottom portion) **2017 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 *2017 Consolidated Fundraising Report* (CGMA Form 30)
- Original of *2017 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 2017 Campaign!***