

Coast Guard Mutual Assistance Campaign 2017



Key Worker's Wrap-Up Instructions

Help is on the Horizon!

Key Workers,

The 2017 CGMA Fundraising Campaign is almost complete. This quick reference guide provides instructions for wrapping up the campaign. Contact your Campaign Coordinator with any questions.

✓ Checklist – please complete no later than 10 May 2017

- Prepare Key Worker 2017 Fundraising Report** (CGMA Form 31)
The automated e-version is easy to use or you can prepare the report manually.

- Sort Pledge Forms** (CGMA Form 33) by category:

Categories:

- Cash
- Active Duty Allotments
- Civilian Payroll Deductions

Note: Donations from **Auxiliary, Retired, and Reserve** members should be sent directly to CGMA-HQ.

- Review and verify the proper completion of Pledge Forms (CGMA Form 33)**

- Ensure contribution amount is legible on all copies.
- Inspect 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 <http://www.cgmahq.org/campaign/2017/campaign2017.html>
- Embedded formulas will automatically process your totals
- Reference the comments on some of the cells (red tabs) for notes and explanations
- Reference continuing allotment spreadsheet provided by Campaign Coordinator

- 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 Continuing* + New + Increases
- **Civilian Payroll Bi-weekly Deductions Total**
- Total deductions contributed = Civilian Continuing* + 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

* Reference continuing allotment spreadsheet provided by Campaign Coordinator

- ❑ **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 Campaign Coordinator by 10 May 2017:**
 - Completed *2017 Key Worker Fundraising Report* (CGMA Form 31)
 - Checks and/or Money Orders (no cash)

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

Distribution of Forms
<p>Donor Keeps:</p> <ul style="list-style-type: none">– Goldenrod copy (bottom copy of the pledge form for their records) <p>Send Campaign Coordinator:</p> <ul style="list-style-type: none">– White copy– Pink copy– Completed Key Worker Fundraising Report (keep a copy for your records)

Thank you for your diligence wrapping up the 2017 Campaign!