



2021 ACTIVE DUTY FUND DRIVE

# MANUAL



NAVY-MARINE CORPS  
RELIEF SOCIETY®

[www.nmcrs.org/adfd](http://www.nmcrs.org/adfd)

2021 ACTIVE DUTY FUND DRIVE

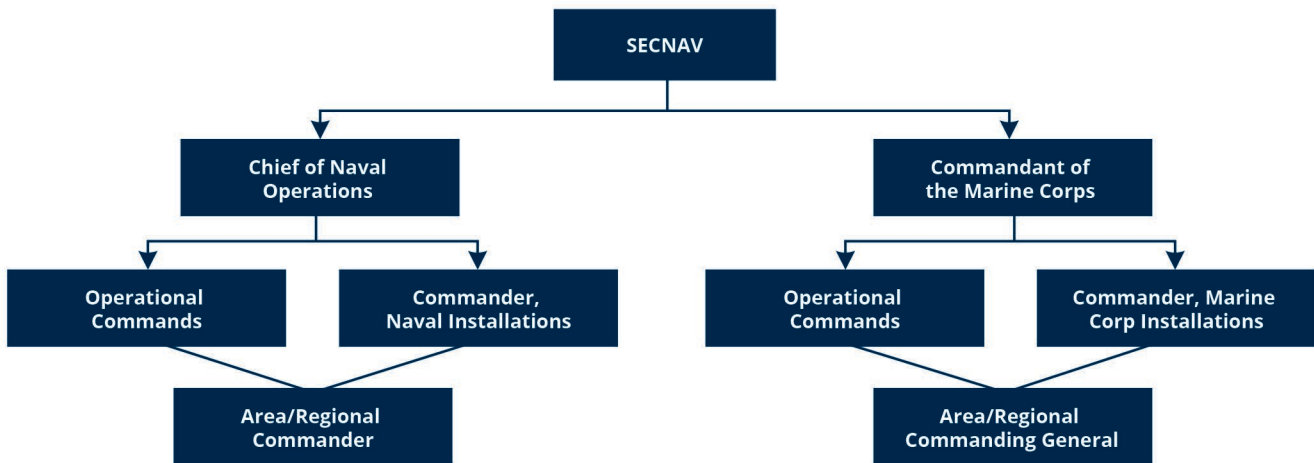
This document is not a Department of Defense or Department of the Navy publication. **Official DOD/DON regulations and directives take precedence in the event of any conflict.**

## Introduction

This Active Duty Fund Drive (ADFD) Manual is a product of the Navy-Marine Corps Relief Society. It is a tool to help Navy and Marine Corps commands/units plan and execute their local Active Duty Fund Drives. Please feel free to modify those elements of the manual which don't apply.

## General Organization

Per SECNAVINST 5340.7A, all Department of the Navy commands and activities with Navy and Marine Corps personnel attached shall conduct an active duty fund drive in support of the Navy-Marine Corps Relief Society during the months of March and April. For ADFD reporting purposes, all USN and USMC operational and administrative commands/units are organized under their local NMCRS office, and by the PSD, CPPA, or IPAC responsible for the command/unit military pay records.



## ADFD Website — [www.nmcrs.org/adfd](http://www.nmcrs.org/adfd)

Information and materials to conduct a successful Active Duty Fund Drive are available online at [www.nmcrs.org/adfd](http://www.nmcrs.org/adfd). Fund Drive Coordinators and Key Persons will find useful reference documents and resource materials, as well as sample talking points, sound bites and promotional materials.

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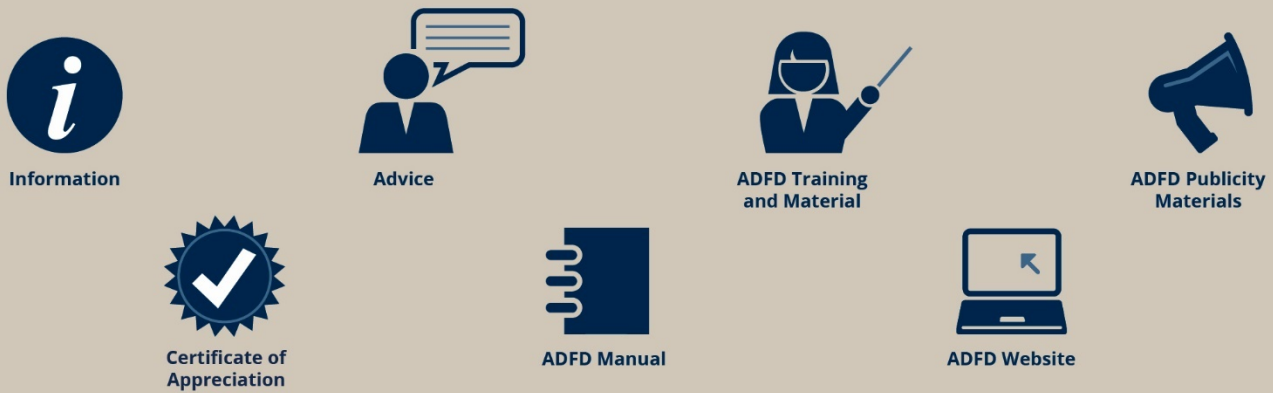
# Overview

## Purpose

The purpose of the ADFD is to educate Sailors and Marines about the programs and services available from the Navy-Marine Corps Relief Society (NMCRS) and to solicit funds that are essential for the NMCRS to continue to provide financial, educational and other needs-based assistance.

## Campaign Support

**Conduct of the ADFD is the responsibility of the Navy and the Marine Corps. While NMCRS should not become directly involved in soliciting contributions, local NMCRS Directors can offer valuable support to the ADFD Coordinator by providing:**



Any Federal employee, including a member of the Armed Forces, who serves on command fundraising committees should not participate in any decision-making where, because of his or her affiliation with the NMCRS, there could be or appear to be a conflict of interest under any criminal statutes or applicable agency standards of conduct.

**Executive Order 12353** directs the Secretary of the Navy (SECNAV) to make an annual call for contributions to support the NMCRS. DOD 5500.7-R (Joint Ethics Regulation) Chapter 3, Section 3 3-210 authorizes fundraising in support of the Navy-Marine Corps Relief Society by DoD employees. SECNAVINST 5340.7A provides policy and guidance for the overall conduct of the SECNAV's annual Active Duty Fund Drive in support of the Navy-Marine Corps Relief Society.

The Department of the Navy is authorized reasonable use of its resources, including appropriated funds, in support of fundraising for NMCRS. The use of appropriated funds is limited to expenses related to ADFD kickoffs, rallies, celebration events, awards ceremonies and other similar events that build support for the ADFD, but that are not directly involved in fundraising (such as carnivals, car washes, bake sales, and sporting events). The use of appropriated funds for refreshments or personal gifts, (other than campaign worker recognition awards or prizes, is not authorized.

## Organization

### Area Commander/Commanding General (CG)/Commanding Officer (CO)

The responsibility for the Active Duty Fund Drive (ADFD) rests with the Area Commander/CG/CO. Each year, the Area Commander/CG/CO appoints a senior officer to the position of ADFD Chair. In some locations the Area Commander/CG/CO may also serve as the ADFD Chair.

### ADFD Chair

The ADFD Chair serves as the Area Commander's/CG's/CO's agent for organizing and implementing the ADFD. The Chair appoints a Coordinator and, where appropriate, an Assistant Coordinator to oversee the local ADFD. In areas conducting a Regional ADFD, the Chair establishes an ADFD Executive Committee to oversee the conduct of the Regional ADFD.

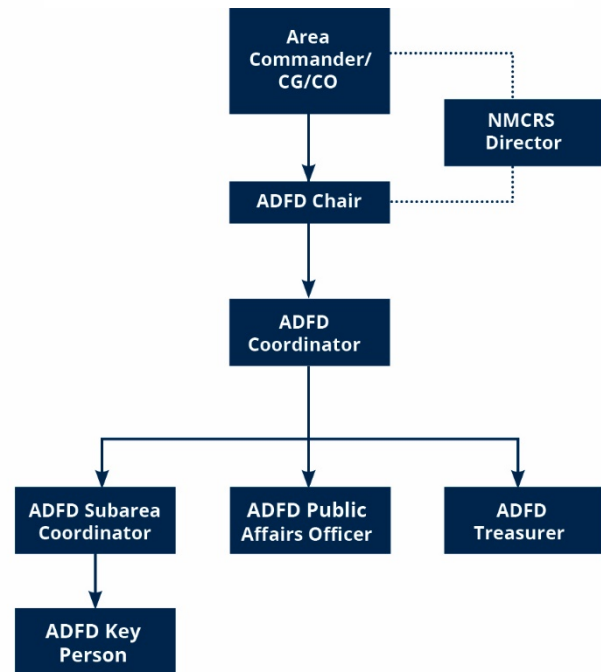
The Executive Committee normally consists of the senior officer, or designated representative from each of the subareas or subordinate commands, to monitor, advise, and assist the Chair in conducting the ADFD. The senior Judge Advocate General and Public Affairs Officer in the area/command are also routinely assigned membership on the ADFD Executive Committee.

This Committee is responsible for:

- Overseeing the implementation of the Area/Command ADFD
- Establishing Area/Command ADFD goals
- Appointing an Area/Command ADFD Coordinator
- Appointing an Area/Command ADFD Treasurer
- Appointing an Area/Command ADFD Public Affairs Officer
- Appointing an Area Military Pay Coordinator from the Navy Personnel Support Activity/Detachment (PSA/PSD/CPA), or the Marine Corps Installation Personnel Administration Center (IPAC)
- Approving requests for early start or extension of command fund drives

NMCRS employees are specifically prohibited from serving on command fundraising committees as voting members. However, the provision of support and advice to such committees on a continuing basis by NMCRS Directors and/or employees is entirely appropriate and desirable, reflecting the unique supported-supporting relationship between the Department of Defense and the Military Aid Societies, as prescribed by 10 U.S.C. 2566 and 5 C.F.R. Part 950.

### Organization Chart



## NMCRS Director

The NMCRS Director is responsible for ensuring that the ADFD Coordinator and Key Persons are given proper training, materials and supplies to conduct a successful fund drive. Although not responsible for conducting the drive, the NMCRS Director will monitor fund drive activities and progress throughout the campaign while maintaining regular communication with the Coordinator throughout the process. NMCRS Directors should be extremely familiar with the ADFD website, and ADFD resources. Directors should plan to remain involved for the entire timeframe of the fund drive, with no lengthy leave or absence planned just prior to, during, or just after the end of the fund drive.

The Director plays a vital role in the overall planning, preparation, conduct and reporting duties of the Coordinator, Subarea Coordinators (if required) and Key Persons.

The Director should use a detailed ADFD Checklist/Timeline which provides a chronological guide to carrying out a successful fund drive (see page 28).

The Director and Coordinator must be thoroughly familiar with the ADFD Command Package and provide detailed instruction to all Coordinators and Key Persons on how to use the marketing materials to conduct a successful fund drive and make timely reports.

Duties and Responsibilities include:

- Review and update the ADFD Checklist/Timeline routinely (see page 28)
- Ensure the Director is listed as a signatory on the local ADFD bank account
- Schedule a meeting early in the process with the ADFD Coordinator to discuss timeline, Kickoff date and location, training dates, and Kickoff message
- Schedule a meeting with the ADFD Chair and ADFD Coordinator to review ADFD timeline and goals.
  - The Director takes this opportunity to explain the ADFD process, how the fund drive has operated historically in this area, highlight local NMCRS assistance and operations, and explain the roles of key players in the local fund drive
  - The Director should further explain that the ADFD Coordinator is vital to the execution of the fund drive and is responsible for the day-to-day planning and operation of the fund drive
- Order fund drive materials early. Identify and develop a plan to distribute fund drive materials to deployed/deploying commands/units
- Review and update spreadsheets with names of commands and units which fall under the ADFD Chair and NMCRS Director's area of responsibility for ADFD purposes. This includes deployed units, commissioning and/or decommissioning ships/subs, squadrons or units, and any new additions to your Installation/Command NMCRS spreadsheet
- Review ADFD website, resources, manual and sample materials. Information and materials presented are vital for each ADFD "Command Package" (i.e. posters, brochures, contribution forms, transmittal forms, collection logs, and weekly reports)
- The Director and ADFD Coordinator should be involved in all training. Every effort should be made to ensure deployed ships, squadrons, units receive instruction by e-mail or online training materials
- Once the fund drive commences, weekly reports from each command are essential. Weekly reports must be received from all Key Persons regardless of the status of their fund drive. The 1st week is critical to ensure all Key Persons' information is correct and that they have reliable connectivity. Coordinator and Subarea

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Coordinators should take the lead to prepare each week's report. The Coordinator or Designee updates the spreadsheet, prepares weekly ADFD update message from Chair, and the fund drive weekly progress report (see Reports)

- Director and ADFD Coordinator provide weekly update to Chair
- Progress reports will continue throughout the remaining weeks. Director/Coordinator should update their ADFD microsite with weekly fund drive progress updates, and announce fund raising events, as well as post photos and stories that encourage competition and participation
- Ensure that funds deposited in the local bank account are transferred to NMCRS HQ upon conclusion of the fund drive

### **Commanding Generals/Commanders/Commanding Officers/Officers-in-Charge**

Commanding Officers/Officers-in-Charge of all Navy and Marine Corps activities are responsible for overseeing the conduct of the annual fund drive within their activities. Normally, they appoint an Activity ADFD Chair to carry out their local fund drive.

Selecting the right Activity ADFD Chair is critical. The Activity ADFD Chair should be an outstanding officer or senior enlisted member who understands the mission of NMCRS and the value NMCRS provides to mission readiness of the active duty force. Having personal history with NMCRS as a client or referring personnel under them to NMCRS for assistance is value added when selecting the ADFD Chair.

Generally, volunteers for this position are the most successful. The Chair should be assigned to the command/unit for the entire timeframe of the ADFD, with no lengthy leave, TAD or deployments just prior to, during, or just after the end of the fund drive.

### **ADFD Coordinator**

The ADFD Coordinator, with the support of the NMCRS Director, is vital to the execution of the annual ADFD campaign. The Coordinator directs the day-to-day planning and operation of the fund drive. The Coordinator should be an officer or senior enlisted individual who is well organized, highly motivated and committed to carrying out the numerous tasks associated with overseeing a successful fund drive. The Coordinator should be assigned to the command/unit for the entire timeframe of the fund drive, with no lengthy leave, TAD or deployments just prior to, during, or just after the end of the fund drive.

Duties and Responsibilities include:

- Maintain an account at a local financial institution for depositing ADFD donations
- Meet early with the Director to plan and discuss details of the upcoming ADFD campaign
- Provide ADFD materials to Subarea Coordinators or other Commands
- Maintain weekly contact with the Director
- Provide status reports to the Chair
- Identify and train next year's Coordinator
- Attend meetings as a member of the ADFD Executive Committee, where appropriate
- Review the ADFD Checklist/Timeline (see page 28) and implement the timeline, to include identification of Kickoff date, location, training dates, and release of Kickoff message
- Be familiar with and review the contribution spreadsheet for accuracy and update as needed (see Reports)



- Determine the need for Subarea Coordinators, depending on scope of responsibility (i.e. number of ships, squadrons, units and tenant commands)
- Ensure all ADFD materials are received and are ready for distribution to Key Persons
- Identify time and place to assemble the ADFD Command Packages to ensure they are ready for distribution at the Kickoff event
- Coordinator/Director should update their ADFD microsite with weekly fund drive progress updates and fund raising events, as well as post photos and stories that encourage competition and participation

## ADFD Subarea Coordinator

In large areas, it is impractical for the Coordinator to plan, coordinate and implement all fund drive requirements for the large number of commands involved. The area is often partitioned into subareas, and Subarea Coordinators are appointed to conduct the fund drive within their respective subareas. The Subarea Coordinator should be assigned to the command/unit for the entire timeframe of the ADFD, with no lengthy leave, TAD or deployments just prior to, during, or just after the end of the fund drive.

Duties and Responsibilities include:

- Meet with the Coordinator and Director to review and plan the ADFD campaign
- Review and update the list of commands and activities which fall within their Subarea
- Identify and mail materials to deployed commands within their subareas
- Maintain regular communication with commands and units to ensure that a Key Person is assigned and attends the ADFD Kickoff event to pick up materials and receive training
- Distribute ADFD materials to command Key Persons who were not able to pick up supplies during the Kickoff event
- Monitor and ensure the timely submission of weekly reports. Follow-up with those who have not submitted reports or transmittals
- Attend meetings as a member of the ADFD Executive Committee, where appropriate
- Identify commands which are good candidates for Team Spirit Awards
- Encourage commands to attend the ADFD Awards Program
- Identify and train next year's ADFD Subarea Coordinator

## ADFD Key Person

ADFD Key Persons are assigned by the command and are responsible for the actual solicitation of donations and conduct of the fund drive within the command or unit. Key Persons are the most important individuals in the fundraising organization. The number of Key Persons to be assigned is left to the discretion of the command. Designation of an assistant Key Person for every 20 members assigned or for separate divisions within the activity has proven most successful. Key Persons should not have significant supervisory responsibilities for subordinates they will be contacting. The Key Person should be assigned to the command/unit for the entire timeframe of the ADFD, with no lengthy leave, TAD or deployments just prior to, during, or just after the end of the fund drive.

Duties and Responsibilities include:

- Attend the ADFD Kickoff event and training
- Provide the Coordinator or designee with the number and paygrade of military personnel assigned to the command unit
- Ensure 100% meaningful contact of all assigned personnel
- Provide an NMCRS brochure, ADFD contribution form to all assigned personnel
- Invite NMCRS representatives to brief command personnel to inform them of NMCRS programs and services available to all service members and their families
- Plan command events and activities in support of the fund drive. Total net proceeds from fundraising events are reported as a single contribution on a contribution form. Enter "Fundraising Event – Golf Tournament" (for example) as the name of the contributor and submit with other command contribution forms
- Receive and account for donations made by military allotment, check, credit card, or cash. A name, Social Security Number (SSN), or Electronic Data Interchange Personal Identifier ((EDIPI), monthly amount to be deducted and a signature are required to process an allotment. The Key Person must ensure this information is complete and legible and sign the contribution form
- If donors do not submit a contribution form when making a cash, check or online credit card contribution, the Key Person must complete a contribution form for each donor and distribute as shown on pages 25 and 26
- Submit funds collected to the Coordinator or Designee
- Submit weekly reports to the Coordinator or Designee
- Thank all command members for their support and contributions to the ADFD
- Attend Awards Ceremony

## ADFD Treasurer

The ADFD Treasurer is responsible for ensuring accountability of all monies received from the Area/Command fund drive. These duties may be carried out by the ADFD Coordinator or Designee.

Duties and Responsibilities include:

- Establish procedures for the control of cash (currency and checks)
- Compile reports from Activity Key Persons or Subarea Coordinators
- Provide weekly reports to the Coordinator
- Review and reconcile bank statements as they are received
- Adjudicate all checks returned for insufficient funds
- Audit bank statements and activity reports to ensure all monies collected are deposited and correctly reflected

## ADFD Public Affairs Officer

The Base Public Affairs Officer (PAO) will be the primary resource for publishing ADFD information and publicity. The PAO should work closely with the Coordinator/Director to publish timely articles, stories and pictures in the Base newspaper and on the Base website and on Social Media platforms.

Duties and Responsibilities include:

- Publish information about the ADFD (announce Kickoff and other events, fundraising goals, weekly tallies, etc.)
- Publish information about NMCRS and its programs and services
- Assist Coordinators, Subarea Coordinators and Directors with submission of stories and/or photos of command activities in support of the ADFD for use in local social media, networking venues, and local community media outlets

## Timeline For the ADFD

This is a general overview with recommended planning activities for military leaders and NMCRS Directors. Successful fund drives require a yearlong effort - with the annual fundraising campaign taking place in March and April. ADFD Chairs/Coordinators may find it necessary to reduce or extend the timeline to fit operational schedules and/ or meet the needs of geographically separated commands/units. Great care should be taken to ensure donation allotments begin with the 1 June payday.

While specific activities and procedures may differ throughout the Fleet and the Marine Force, preparation for the ADFD should begin each year in the fall. ADFD marketing materials and other supplies are ordered, and the NMCRS Director meets with the ADFD Chair and ADFD Coordinator to review timelines, establish area goals and propose training schedules. When necessary, training of ADFD Key Persons begins for commands/units expected to be deployed or TAD during the fund drive.

Earnest planning begins in early winter when NMCRS Directors meet with ADFD Coordinators. This meeting is to review historical NMCRS assistance rendered to area commands/units, as well as a review of the previous year's fund drive results; confirm dates and locations for the ADFD Kickoff and ensure senior military leaders can attend; finalize ADFD Chair's Kickoff invitation message; review list of commands/units that will be included

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in the area fund drive; and identify commands/units scheduled to deploy or be assigned TAD/TEMDFU during the fund drive. Additional meetings are held and training is conducted with Area ADFD Coordinators. Final preparations for the ADFD are completed.

All ADFD materials must be delivered to operational commands prior to deployment/TAD/TEMDFU, or mailed well in advance of the fund drive to ensure command/unit ADFD Coordinators/Key Persons have a sufficient quantity of materials on hand to conduct a successful campaign.

An area-wide Kickoff event is held no later than the last week of February. It should be well coordinated to ensure the majority of senior military leaders, ADFD Coordinators and command Key Persons can attend. This event provides the Commanding General/Area Commander/ADFD Chair a public venue to express his/her support of the ADFD, encourage participation and “rally the troops.” The NMCRS Director should provide a brief overview of the NMCRS and its program and services, as well as a review of the history of NMCRS assistance and programs provided to the local commands/units.

The agenda also includes an opportunity for the ADFD Coordinator to provide guidance and instructions to command ADFD Key Persons. The Kickoff event ends with distribution of fund drive materials and supplies to all ADFD Key Persons.

ADFD Key Persons turn in activity and fundraising reports to the ADFD Coordinator, or Designee at least weekly throughout the campaign. Each Monday, the NMCRS Director and/or Designee updates the ADFD microsite with goal achievements for review by NMCRS HQ and military leaders on Tuesday. Weekly progress messages are drafted and provided to the ADFD Chair for release to area commands to inform them of ADFD progress-to-date, and encourage their personal attention and involvement.

Every fundraising campaign should be worthy of celebration! The ADFD Chair hosts an awards ceremony to recognize the volunteer efforts of all involved. Award ceremonies will take on different formats - based on local customs and procedures.

Beginning in May and upon completion of the final audit of the area ADFD, funds deposited in the local ADFD bank/credit union account should be wired to NMCRS HQ (ATTN: Finance).

Following completion of the fund drive, NMCRS Directors and ADFD Coordinators conduct a “hot wash” to review the results of the ADFD. A lessons learned report is prepared and provided to the Area ADFD Chair and President, NMCRS. Next year’s ADFD Chair and Coordinator are identified and included in the ADFD review session to ensure a complete turnover of responsibility. Signature cards for the local ADFD bank/credit union account are updated with proper signatures. The general timeline for the ADFD reflects a year long cycle.

<b>Fall</b>	Order ADFD marketing materials and supplies
<b>Nov-Dec</b>	Meet with NMCRS Director, ADFD Chair and ADFD Coordinator Identify and develop a plan to distribute fund drive materials to deployed/deploying commands/units.
<b>February</b>	Release message announcing ADFD Kickoff event and instructing commands to report name and contact info for all ADFD Activity Key Persons.
<b>Last week of Feb</b>	ADFD Kickoff Event
<b>March 1st</b>	<b>ADFD CAMPAIGN</b>
<b>March</b> End of 1st week	Turn in 1st transmittal report and spreadsheet - Draft 1st week's ADFD progress message and provide to Area Commander/CG Release of message by Area Commander/CG
<b>March</b> End of 2nd week	Turn in 2nd transmittal and spreadsheet - Draft 2nd week's ADFD progress message and provide to Area Commander/CG Release of message by Area Commander/CG
<b>March</b> End of 3rd week	Turn in 3rd transmittal and spreadsheet - Draft 3rd week's ADFD progress message and provide to Area Commander/CG Release of message by Area Commander/CG Announce ADFD extension, if necessary
<b>March</b> End of 4th week	Turn in 4th transmittal and spreadsheet - Draft 4th week's ADFD progress message and provide to Area Commander/CG Release of message by Area Commander/CG
<b>April</b> End of 1st week	Turn in 5th transmittal and spreadsheet - Draft 5th week's ADFD progress message and provide to Area Commander/CG Release of message by Area Commander/CG
<b>April</b> End of 2nd week	Turn in 6th transmittal and spreadsheet - Draft 6th week's ADFD progress message and provide to Area Commander/CG Release of message by Area Commander/CG releases
<b>Mid to late April</b>	Draft message announcing final results of ADFD and announce award ceremony Release of message by Area Commander/CG Transfer local ADFD bank account funds to NMCRS HQ (and Finance)
<b>May/June</b>	Host awards ceremony Conduct lessons learned meeting Identify next year's ADFD Chair and Coordinator
<b>Summer</b>	Work with local commands/units to schedule briefings about NMCRS programs and services

## Fund Raising Principles

### Meaningful Contact

ADFD Key Persons should make every effort to ensure 100% meaningful contact is made in order to provide information about NMCRS programs and services available to every Sailor and Marine, make a personal statement of support for the NMCRS, and request contributions to the NMCRS. Online contact is not considered effective or meaningful and should be discouraged.

### Prohibited Activities

Coercive activities are contrary to the intent of Federal fundraising policy and are not permitted.

**The following are specifically prohibited by Joint Ethics Regulations:**

- ⊗ Solicitation of service members by their supervisor or by any individual in their supervisory chain of command.  
(This does not prohibit the Area Commander/Commanding General/Commanding Officer/Officer in Charge from performing the usual activities associated with the ADFD Kickoff and to demonstrate his or her support of the NMCRS in routine communications. Care must be taken in selecting Activity Key Persons to ensure direct supervisors are not placed in a position where they can exercise undue coercion on any persons working for them)
- ⊗ Supervisory inquiries about whether a service member chose to participate or not, or the amount of a service member's donation. Supervisors may be given summary information about their unit's participation and fundraising achievement
- ⊗ Mandating 100 percent participation
- ⊗ Mandating personal dollar goals and/or quotas
- ⊗ Providing and using contributor lists for purposes other than the routine collection and forwarding of contributions and allotments
- ⊗ Using the results of a solicitation in a negative manner in a performance appraisal

## Area ADFD Bank Account



  
**Preprinted Deposit Slips**  
 Should be made available to  
 ADFD Subarea Coordinators and  
 Activity ADFD Key Persons



**Donations should never be deposited into personal bank accounts**



- All funds raised through donations and events shall be deposited in the local ADFD bank account. Deposits should be made at least weekly to avoid theft or loss of funds.
- Shipboard activities should coordinate with the Ship's Disbursing Officer for the safe keeping of donated funds. These funds should be converted to a government check (ex-cash-remittance check) or Money Order for the total cash received and mailed to the ADFD Coordinator for deposit into the Area ADFD bank account.
- Upon conclusion of the fund drive, the ADFD Coordinator and the local NMCRS Director should ensure that all monies deposited in the local ADFD bank account are sent to NMCRS Headquarters. Electronic or wire transfers are preferred and the local NMCRS Director will provide instructions.
- ADFD Treasurers should routinely audit the local ADFD bank account to ensure accountability and proper handling. Upon conclusion of the fund drive, a final audit and report should be provided to the ADFD Chair/Executive Committee. These duties may be carried out by the ADFD Coordinator or Designee.

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- NMCRS Directors should provide email notifications of ACH transfers to [finance@nmcrs.org](mailto:finance@nmcrs.org) and [giving@nmcrs.org](mailto:giving@nmcrs.org) and include total amount of funds being transferred. Email should also identify costs associated with events (bake sales, golf tournaments, marathons, etc.) to ensure the correct deposit amount is allocated to ADFD fundraising expenses vice donations. For instance, if the NMCRS credit card or other NMCRS funds are used to purchase golf tournament prizes or other supplies to support a fund raising event or activity, repayment of those costs must be identified and deducted from the total funds received to determine the total proceeds (net of expenses) from a fundraising event or activity.

**Internal Revenue Service (IRS) regulations** require that a Taxpayer Identification Number (TIN) be used to identify all bank accounts. The IRS has agreed to allow military commands establishing a bank account for the safekeeping of ADFD donations to use the NMCRS Employer Identification Number (EIN) as the TIN for these accounts. The local NMCRS Director will provide the appropriate EIN for this purpose. The local NMCRS Director should also be listed as a signatory on these accounts to ensure access if and when active duty co-signers are no longer available. In some areas, these accounts are left open by retaining the minimum balance at the close of the ADFD.



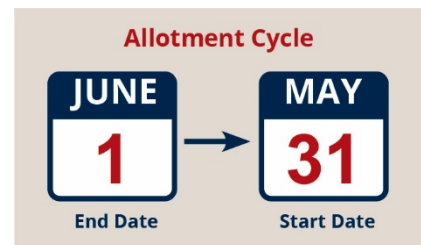
## ADFD Scope of Responsibility

It is important that all Navy and Marine Corps personnel learn about their eligibility for programs and services offered by the Navy-Marine Corps Relief Society and be given an opportunity to contribute to the Society as a means of supporting Shipmates and fellow Marines experiencing financial hardships. The Secretary of the Navy's annual Active Duty Fund Drive provides that opportunity.

ADFD Chair/Coordinators and NMCRS Directors should work with their Personnel Support Activity (PSA) and local Personnel Support Activity Detachments (PSD), or Installation Personnel Administrative Center (IPAC) to identify the location and contact information for all personnel, especially those geographically separated from the installation, TEMDU or TAD. Every effort should be made to reach Recruiters, NROTC Units, and all operational units deployed or temporarily assigned OCONUS, or to remote locations to ensure every Marine and Sailor is given the opportunity to learn about the NMCRS and to contribute to the ADFD.

## Time Frame

The time frame for conducting the ADFD is dictated by the Defense Finance and Accounting Service (DFAS). All charitable allotment cycles to the military aid societies for all branches of the Armed Forces must start on **1 June and end on 31 May**. In order to ensure the timely registration of these charitable allotments, the time frame for conducting the ADFD is March-April. Should that period be impractical for a particular unit, Commanders/CGs/COs/OICs may extend the ADFD campaign or designate an alternate period providing it does not conflict with other charity campaigns. The ADFD may not begin prior to 16 January and should end no later than 15 May, unless an extension is approved by SECNAV.



## Allotments

All active duty contributions from payroll deductions are accomplished through 12 monthly allotments. Defense Finance and Accounting Service (DFAS) requires that all NMCRS charitable allotments begin June 1 and run through May 31 of the following year. Allotment contributions for Navy personnel must be accomplished through the PSD responsible for the service member's pay record. Allotment contributions for Marine Corps personnel must be accomplished by the IPAC responsible for the service member's pay record. All active duty contributions are transmitted as a lump sum payment from DFAS to NMCRS via a monthly deposit of funds.

**The minimum amount of an allotment is \$1.**

Active duty personnel must have a **minimum of 3 months remaining on their EAOS/EOS** to start an allotment. If the service member's EAOS/EOS is prior to September, and the member does not intend to re-enlist, an allotment contribution cannot be accepted, and a cash or check contribution should be made in lieu of an allotment. If the service member plans to re-enlist, annotate the contribution form to that effect before turning it in to PSD/IPAC. If the discharge date is November or later, the pay system will terminate the allotment at discharge. The total contribution should reflect the number of months in which the allotment will be paid.

*Example: \$20 monthly allotment for service member with 6 months remaining on EAOS/EOS is \$120, not \$240.*

## Soliciting Donations

Every active duty member should be contacted personally, provided information about NMCRS and asked to contribute to the SECNAV's ADFD in support of NMCRS. Students and other personnel assigned TAD or TDY should be considered a member of a command if they are onboard for more than two weeks. Common sense should be used in dealing with these cases, keeping in mind that the objective is to solicit each person at some point during the fund drive.

### Best practices for Key Persons contacting command members:

- Fill in the member's name, command and UIC/RUC before distributing the contribution form
- Contact each member on pay day
- Follow up with those who have not contributed
- Finish your conversation with a sincere "thank you"

To minimize double-counting, if a member transfers during the fund drive, the member will be counted in the command at which he or she was first contacted and not in their subsequent command. Therefore, a member who has contributed at one command will not be re-solicited for another contribution or counted in the per-capita calculations of another command.

### Ideas for addressing a group:



#### Share a Story

Talk about someone who has received assistance from NMCRS



Explain why monthly allotments are easier on the budget



Provide Information about NMCRS



#### Describe how NMCRS helps

Talk about how financial fitness contributes to the command's mission readiness and how NMCRS can help them create a financial fitness plan

“What would you do if.. ”

#### Ask a hypothetical question

Give an example of an unexpected need for financial assistance



Explain How to Donate

**Thank the Audience**



## Solicitations



### Active Duty Personnel

The primary fundraising activity of the ADFD is personal solicitation of voluntary contributions from service members by designated Key Persons. Contribution by allotment should be strongly encouraged as it provides the most convenient method for service members of all pay grades to contribute to the work of the NMCRS on a regular basis.



### “Outside The Gate and Civilian Employees”

Donations to NMCRS from local community businesses and organizations are received throughout the year and are always welcome and appreciated. Regulations strictly prohibit active duty service members from soliciting charitable contributions from non-active duty personnel, to include civilian government employees, military retirees, businesses and family members; however, cash, check or credit card/online donations voluntarily made to the ADFD by non-active duty members should be gratefully accepted and recorded as part of the local active duty fund drive. Key Persons should complete a contribution form for the donation and provide Copy 3 to the donor for their receipt and tax filing. Note: Online credit card donations can be one-time or monthly recurring payments.



### Reservists

Reservists are eligible for NMCRS financial assistance only while recalled to extended active duty for 30 days or longer, and in certain emergencies while performing two weeks' Active Duty for Training. Commands and activities may accept cash, check, or credit card donations, but should not solicit donations from reservists. Reservists cannot donate by military allotment unless on active duty for 90 days or more.



### Retirees

USN and USMC retirees are solicited through a direct mail campaign from SECNAV requesting their support of NMCRS through allotments from their military retired pay. Commands and activities may accept cash, check, or credit card donations, but should not solicit donations from retirees. Retirees desiring to contribute to the NMCRS through their military retired pay may complete the ADFD contribution form. However, their contribution forms should be provided to the NMCRS Director and/or forwarded to NMCRS Headquarters. They can also contact NMCRS Headquarters at 1-800-654-8364, or email [giving@nmcrs.org](mailto:giving@nmcrs.org) to start an allotment to NMCRS from their retired military pay.

## Collecting Donations

Donors are encouraged to use the contribution form for allotments, cash, check, and online contributions. When properly completed, this form becomes a record of their donation for tax-filing purposes. Key Persons should sign the contribution form and return it to the donor.

If donors do not complete a contribution form for cash, check, or online credit card contributions, Key Persons should complete a contribution form for each donor and retain as indicated on pages 25 and 26.

**A name, Social Security Number (SSN), or Electronic Data Interchange Personal Identifier (EDIPI), monthly amount to be deducted, and a signature are required to process an allotment.** Key Persons must ensure this information is complete and legible. SSN is required for USN personnel, the EDIPI is only authorized for use by USMC personnel.

### Requirement for SSN on Allotment Forms

For DOD Audit purposes, all requests to start/stop an allotment require either an SSN or EDIPI to ensure the action is taken in the correct pay account. USN and USMC are making every effort to revise all pay and personnel systems to support the use of the DoD ID/EDIPI in lieu of the SSN. The USMC military pay systems are now capable of using the EDIPI for NMCRS allotment purposes. The ADFD contribution/allotment form has been revised to reflect the use of EDIPI for USMC personnel. However, the USN military pay system still requires the use of the SSN. Eventually, USN military pay systems will be capable of using the DoD ID in lieu of the SSN and the ADFD contribution/allotment form will be revised to reflect that change.

### Contributions from Fundraising Events

All cash and checks received from fundraising events such as golf tournaments, fun runs, marathons, etc. should be included in the total proceeds of a fundraising event. Each event should be treated as a single contribution. Enter "Fundraising Event – Golf Tournament" (as appropriate) as the name of the contributor on the ADFD contribution form and deliver the funds collected to the Activity ADFD Chair for deposit in the local ADFD bank account.

## Procedures for Processing ADFD Navy Allotments

1. ADFD Command Chair compiles completed Contribution Forms and lists the required information on the Allotment Transmittal Form (ATF).
2. Command Chair schedules a time to meet with Command Pay & Personnel Administrator (CPPA) to provide completed materials necessary to start allotments.
3. CPPA signs and dates the ATFs after reviewing the materials for errors.
4. Command Chair leaves the top copy of ATFs and top copy of Contribution Forms with CPPA after setting a time to return within 1-2 days, to allow CPPA time to create and submit the TOPS transactions.
5. After creating each TOPS transaction, CPPA writes the TOPS transaction number and PSD Location on the bottom, right corner of the ATF.
6. CPPA scans and submits ATFs and Contribution Forms (3 per page, combined into one scanned file) to PSD via TOPS, titling them using the following format:
  - NMCRSADFD (UIC) # of # total
7. CPPA retains the top copy of the ATFs and top copy of the Contribution Forms and stores them in a locked cabinet for 2 years to protect PII.
8. Command Chair returns to CPPA at the designated time to write the TOPS transaction numbers and PSD Location on the remaining copies of the ATFs.
  - ATFs and Contribution Forms will be submitted later to the Sub Area Coordinator at the audit and retained at the command.
9. In May before the audit, Command Chair holds a final meeting with CPPA to verify TOPS transactions were completed successfully so allotments can start on time (1-June).
  - CPPA initials and dates the Command Chair's ATFs at the end of the meeting.
10. Command Chair schedules audit with Sub Area Coordinator, providing middle copy of the ATFs and remaining copy of the Contribution Forms.
  - Sub Area Coordinator will verify TOPS completion date on ATFs.
11. Command Chair retains the last copy of the ATFs at the command until next year's ADFD begins.

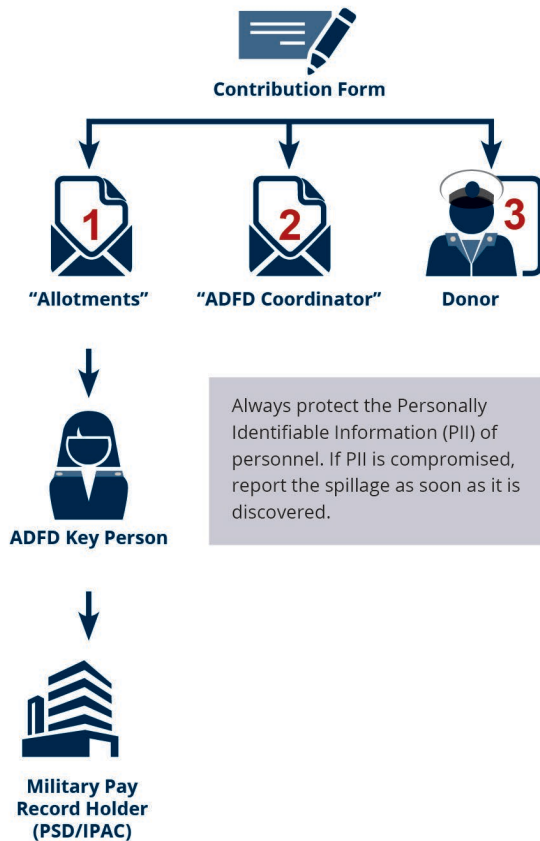
## IPAC Procedures for Processing ADFD Marine Corps Allotments

1. Allotment forms are received from each individual Command Coordinators along with a cover sheet indicating the number of allotment request(s) & a transmittal sheet. While the Command Coordinator is present the IPAC personnel verify the number of requests received and sign the cover sheet. A copy of the signed receipt is provided for the Command Coordinator for their records. The coordinators will then turn in the duplicate allotment forms along with their transmittals during the weekly turn-ins.
2. IPAC then verifies the allotment forms for signature, branch of service and EAS (any EAS that expires within 90 days of the effective date cannot be processed).
3. The clerk can't input the information into 3270 to start the allotment earlier than ninety days out. Once the allotments are completed they are provided to the certifying officer to process.
4. If there are any rejections, the Command Coordinator is notified and returns to IPAC to pick up the forms that are unable to process for appropriate action i.e. USN, EAS, incorrect EDIPI.

# Processing Donations

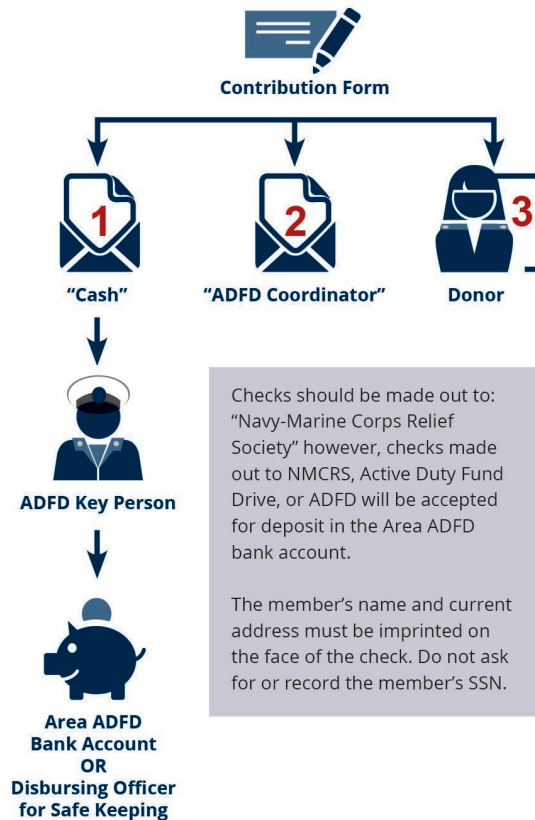
## Allotments

- For allotments, place **Copy #1** in an envelope marked “**ALLOTMENTS.**” The Activity ADFD Key Person provides Copy #1 to the PSD/IPAC to start the allotment.
- Place **Copy #2** in an envelope marked “**ADFD Coordinator.**” The Activity ADFD Coordinator retains Copy #2 until the fund drive is completed.
- Remove **Copy #3** and give to the **Donor.** Remind him/her that their donation may be tax deductible and to keep copy #3 as his/her receipt for that purpose. Thank the Donor.



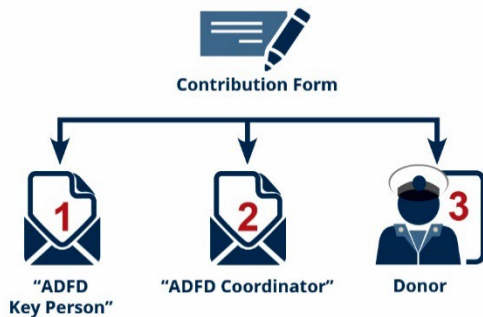
## Cash and Check

- For cash or check donations, place all cash and checks and **Copy #1** in an envelope marked “**CASH.**”
- For cash and checks, the Activity ADFD Key Person makes a deposit in the **local ADFD bank account.**
- Place **Copy #2** in an envelope marked “**ADFD Coordinator.**”
- Remove **Copy #3** and give to the **Donor.** Remind him/her that their donation may be tax deductible and to keep copy #3 as his/her receipt for that purpose. Thank the Donor.



## Online Credit Card and PayPal

- For online credit card or PayPal donations, **keep Copy #1** and place in an envelope marked **“ADFD Key Person”**.
- Place **Copy #2** in an envelope marked **“ADFD Coordinator”**. The ADFD Coordinator retains Copy #2 until the fund drive is completed.
- Remove **Copy #3** and give to the **Donor**. Remind the donor that the donation may be tax deductible and to keep copy #3 as a receipt for that purpose.
- Online credit card and PayPal donations may be made at <https://support.nmcrs.org/a/adfd>.



## Fund Raising Ideas

**If safe to do so, Commands are encouraged to plan, coordinate, and conduct local fundraising activities.** Fundraising activities should include enough diversity to appeal to a cross section of assigned personnel and generate funds which will be included in the command/unit fund drive total.

In addition to personal solicitation, and in the spirit of team-building and camaraderie, commands may also want to sponsor other types of fundraising activities. Events should be structured to foster good morale and build unit cohesion. Command leadership should be involved and the events are to be conducted in moderation and good taste. Conversely, fundraising events should not be so grandiose and labor-intensive that they become a burden to active duty service members or interfere with military duties and responsibilities.

## Using the Society's Name

The Active Duty Fund Drive is conducted in support of NMCRS, which is the sole beneficiary of the drive. Therefore, the title "Navy-Marine Corps Relief Society" cannot be used in connection with fundraising events in a manner which implies that NMCRS exercises direction or control over the event.

### Proper Usage

**"Active Duty Fund Drive Open Golf Tournament"**

**"Marine Corps ADFD Mud Run"**

**"Navy-Marine Corps Open Golf Tournament to benefit NMCRS"**

### Improper Usage

**"Navy-Marine Corps Relief Society Open Golf Tournament"**

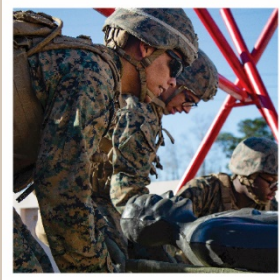
**"NMCRS Mud Run"**

**"NMCRS Fund Drive"**



## Fund Raising Ideas (cont'd)

The Commander/CG must determine that the proposed fundraising event does not violate law, regulation or is contrary to public policy.



### Events

Depending on the circumstances, the following types of events may be possible:



**Food Sales** – Bake sales, hot dog sales, ice cream cone sales, etc.



**Anything-a-Thons** – Jog-a-Thons, Swim-A-Thons, and Dance-A-Thons allow service members to solicit as many sponsors as possible who pledge a certain amount per mile, minute, hour, yard, etc. After the “A-Thon” is over, pledges are collected and provided to Key Person. As an incentive, prizes may be awarded to the top performers.



**Dunk Tanks Dunk Tanks** – With the proper officer and senior enlisted assistance, dunk tanks can be tremendous fundraising events. Recommend a survey to identify who would be the most popular dunkees, solicit their enthusiastic cooperation, then publicize the activity to generate potential dunkers.



**Car Washes** – Particularly popular when the car washers are the CO, XO or senior enlisted personnel.



**Tournaments** – Fishing, soccer, volleyball, basketball, etc. – where local laws and regulations permit.

**NOTE:** Amounts paid for chances to participate in raffles, lotteries, or similar drawings or to participate in sports competitions such as golf tournaments for valuable prizes are not donations in support of the ADFD, and do not qualify as deductible charitable contributions for tax purposes.

## Rules for “Closed” and “Open” Events

“Open” Event: The sale of tickets or chances to persons outside of the command or unit (“open” events increase donations by including a larger population).

“Closed” Event: The event is only for people within the command or unit.

*To avoid confusion or concern, the sponsoring command should, at the outset, determine whether an event is to be “open” or “closed” and ensure that persons soliciting participation are properly advised.*

- Procedures for handling the money raised must be established by the sponsoring command
- To encourage the sale of tickets by other commands to “open” events, and to credit each command for its fundraising efforts, the profits raised through such sales will be evenly divided between the command sponsoring the event and the commands selling tickets
- Both the sponsoring command and any commands selling tickets will annotate their weekly reports to indicate both the total profit generated by ticket sales and the command/unit’s “percent” of the total to be credited to their ADFD total

### Raffles, Lotteries & Other Games Of Chance\*\*



BINGO				
3	18	32	48	70
5	27	40	52	62
11	16		47	61
2	28	44	56	67
14	25	34	55	72

SECNAV has traditionally authorized raffles, lotteries and carnival-type games of chance in support of the ADFD. Casino-type games of chance are always prohibited.

**All forms of gambling must conform to local laws.**

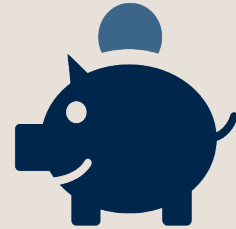
## Event Supplies and Prizes



Commands must keep **accurate records** of, and retain **receipts** for, all raffle and/or event prizes and/or supplies purchased. Revenue from events must be kept separate from allotment and cash contributions, so that there is no appearance of contribution dollars being used to underwrite expenses. This method of identifying sources of contributions will also help the ADFD Coordinator keep an accurate record of income and losses associated with event activities. In summary, fundraising events produce funds on a “net” basis. Total receipts less expenses (including the cost of prizes) equates to net contributions.

### Disposition of Funds

Proceeds from fundraising events will not be kept in the custody of NMCRS Directors. ADFD Chairs/Coordinators should place the money collected at fundraising events in their local ADFD bank account.



Because there is a benefit received or a “chance” that a benefit will be received, the Internal Revenue Service does not consider the purchase of a raffle ticket or to participate in a fundraising event as a tax-deductible contribution—and participants should not be given a contribution/allotment form for this purpose.

## Reports

Key Persons should record all allotments on the ADFD Allotment Transmittal Form and retain in the envelope marked "ALLOTMENTS." All contributions should be recorded on the Key Person Collection Log and retained in the envelope marked "ADFD Coordinator." Both of these envelopes should contain copy #2 of the contribution form to support the recorded amount of each type of donation received.


### Activity Chair Weekly Progress Reports:

ADFD Coordinators should maintain Activity Chair Weekly Progress Reports, by Unit, and provide them to the ADFD Chair. Regular reporting facilitates fund drive success, and allows leadership to make adjustments when and if necessary.

The ADFD Allotment Transmittal Form, Activity Chair Weekly Progress Report and Key Person Collection Log may be downloaded [Active Duty Fund Drive Resources | NMCRS](#).

### Active Duty Fund Drive Navy Allotment Transmittal Form

In support of



NAVY-MARINE CORPS RELIEF SOCIETY

**ADFD ACTIVITY CHAIR WEEKLY PROGRESS REPORT**

1. Check appropriate week and report by 1200 on Friday:  
 Week 1 \_\_\_\_\_ Week 2 \_\_\_\_\_ Week 3 \_\_\_\_\_ Week 4 \_\_\_\_\_ Week 5 \_\_\_\_\_  
 Week 6 \_\_\_\_\_ Week 7 \_\_\_\_\_ Week 8 \_\_\_\_\_ Week 9 \_\_\_\_\_ Week 10 \_\_\_\_\_

2. Command/Activity:  
 a. CO/Director (rank/name): \_\_\_\_\_  
 b. Command Acronyms: \_\_\_\_\_  
 c. UIC/RUC: PRIMARY UIC/RUC

3. Command Duty Phone:  
 a. Address: \_\_\_\_\_  
 b. City, State Zip Code: \_\_\_\_\_

4. Drive Key Person:  
 a. Phone: \_\_\_\_\_  
 b. Email: \_\_\_\_\_

5. Alternate Key Person  
 a. Phone: \_\_\_\_\_  
 b. Email: \_\_\_\_\_

6. Total number of active duty personnel assigned: \_\_\_\_\_

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Total
7. Number of contacts this week:											0
8. Number of donors this week:											0
9. Amount of cash/check this week:											\$ -
10. Amount of allotment contributions during this week:											\$0.00
11. Amount of credit card contributions during this week:											\$0.00
12. Total amount of contributions made during this week:		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
13. Income from Command Fund Drive Activities/Events:											\$0
14. Total amount of contributions to date:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

This form is available online at <https://www.nmcrs.org/pages/ADFD-Resource>

## NMCRS Allotment Processing Form for US Navy

From: \_\_\_\_\_ Date: \_\_\_\_\_

Command UIC/RUC

TOPS allotments format: **NMCRSADFD (UIC) # of # total** EFF June: \_\_\_\_\_

### Post allotments for the individuals listed below

Please process the corresponding contribution forms and acknowledge receipt by signing in the space provided below. Return second and third copy to ADFD command representative.

	Last Name	First Name	Last 4 of SocSec#	\$ Monthly Amount	# of Months	\$ Total Amount
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
	<b>Total</b>					

_____ Activity Fund Drive Key Person Signature	_____ CPPA Name & Signature
_____ Print Name	_____ CPPA Phone & Email Address
_____ Phone: Activity Fund Key Person	_____ Date Submitted to TOPS
	_____ TOPS Transaction # & PSD Location

\* Assume 12 months unless EAOS/EAS is less than 12 months.  
**TOP COPY** (RETAINED BY CPPA)    **SECOND COPY** (TRANSFERRED TO SAC, THEN AREA TREASURER)    **THIRD COPY** (RETAINED AT COMMAND)

This form is available online at <https://www.nmcrs.org/pages/ADFD-Resource>

## NMCRS Allotment Processing Form for Marines

\_\_\_\_\_  
DATE

FROM: \_\_\_\_\_  
(Unit / Command Coordinator Name)

TO: \_\_\_\_\_  
(ADMINISTRATIVE UNIT PROCESSING ALLOTMENTS)

SUBJ: NMCRS ALLOTMENT FORMS FOR PROCESSING FOR THE PERIOD OF \_\_\_\_\_

ENCL: (NUMBER OF NMCRS ALLOTMENT FORMS FOR PROCESSING)

1. The enclosure is provided for processing of allotments.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
CONTACT PHONE NUMBER

\_\_\_\_\_  
E-MAIL ADDRESS

### FIRST ENDORSEMENT

FROM: \_\_\_\_\_ (ADMINISTRATIVE UNIT PROCESSING ALLOTMENTS)

TO: COMMAND COORDINATOR \_\_\_\_\_

ENCL: \_\_\_\_\_ (NMCRS ALLOTMENT FORMS PROCESSED)

1. The enclosure is returned, action was completed on \_\_\_\_\_.
2. Allotments processed \_\_\_\_\_.
3. Allotments returned for corrective action \_\_\_\_\_.

REASON \_\_\_\_\_

\_\_\_\_\_

This form is available online at <https://www.nmcrs.org/pages/ADFD-Resource>

## ADFD Key Person Collection Log

Key Person: \_\_\_\_\_ Unit/Division: \_\_\_\_\_

On a schedule determined by the Activity ADFD Chair, Key Persons should verify the amounts shown on their collection log, reconcile discrepancies, and provide their envelopes and collection log to the Activity ADFD Coordinator. The Activity ADFD Coordinator should then ensure each envelope is marked with the Key Person's name, date of turn-in, and includes the collection log. A copy of each collection log should be retained by the Key Person until conclusion of the fund drive.

Name of Donor	Date Contacted/ Donation Received	Allotments		Cash Contributions		
		Monthly Allotment Amount	Allotment X 12 Months	Check	Cash	Credit Card Online/ Website
Totals		\$	\$	\$	\$	\$

This form is available online at <https://www.nmcrcs.org/pages/ADFD-Resource>

Checklist/Timeline

NMCRS ACTIVE DUTY FUND DRIVE CHECKLIST - INDIVIDUAL OFFICE APPROACH

FALL		F50	COORD	*	**
	Order ADFD Materials			X	
	Review deployment schedule of ships, squadrons and units that will be deployed prior to start of ADFD and plan advance delivery of materials before deployment				
	Identify and meet with next year's ADFD Chair & Coordinator			X	
	Contact local leadership to review ADFD timeline and discuss goals and Coordinator responsibilities			X	
JANUARY		F50	COORD	*	**
TBD	Planning Meeting with ADFD Coordinators			X	
	Review timeline of events			X	
	Discuss Fund Drive Kickoff			X	
	Discuss Fund Drive dates (Check Area Commander/CO Schedule)			X	
	Discuss Fund Drive collection dates			X	
	Prepare and review kickoff message			X	
	Reserve kickoff location w/AV support			X	
	Letter/Application to base for approval to display thermometer				
	Discuss ADFD Microsite – <a href="http://www.nmcrs.org/adfd/yourarea">http://www.nmcrs.org/adfd/yourarea</a>			X	
	Identify Subarea Coordinators including PSD/IPAC and Legal			X	
	Prepare Special event/ceremony Speaking Points & Brief Sheet for Area Commander/CO				
FEBRUARY		F50	COORD	*	**
TBD	Draft Kickoff Message and provide to Area Commander/CO			X	
	Planning Meeting with ADFD Coordinators/Area Coordinators			X	
	Add/delete commands as necessary to the ADFD Contributions & Assist Report			X	
	Go over materials that will be given to commands			X	
	Update list of deployed commands				
	Pack deployed command materials				
	Mail deployed command materials				
	Set Fund Drive Reporting Dates			X	
	Review kickoff itinerary			X	
	Draft command support message and provide to Area Commander/CO			X	
	Review Coordinator ppt slideshow			X	
	Meet with NEX/MCK representative to discuss Coupon Sales Program			X	
	Send email to kickoff presenters				
	Area Commander/CO releases Kickoff message announcing Fund Drive and instructing commands to report name and contact info for all Key Persons			X	
3rd WEEK	Area Commander/CO releases Command Support Message showing prior year stats for F50			X	
4th WEEK	Deadline for reporting names and Keyperson info			X	
	ADFD Kickoff event			X	
MARCH		F50	COORD	*	**
1st WEEK	1st Transmittal turn in by Friday noon			X	
	Update local and HQ spreadsheets			X	
	ADFD area microsite update			X	
	Draft weekly message and provide to Area Commander/CO			X	
	ADFD Contributions & Assistance Spreadsheet report sent to Director and Coordinator			X	
	Coordinator delivers update to ADFD Chair			X	
2nd WEEK	Deliver 1st Transmittal command contribution message to Area Commander/CO			X	
	Area Commander/CO releases 1st contributions update message to area commands			X	
	2nd Transmittal turn in by Friday noon			X	
	Update local and HQ spreadsheets			X	
	ADFD area microsite update			X	
	Draft weekly message and provide to Area Commander/CO			X	
	ADFD Contributions & Assistance Spreadsheet report sent to Director and Coordinator			X	
	Coordinator delivers update to ADFD Chair			X	
	Thermometer installed by Seabees/other AD Command				
3rd WEEK	Deliver 2nd Transmittal command contribution message to Area Commander/CO			X	
	Area Commander/CO releases 2nd contributions update message to area commands			X	
	3rd Transmittal turn in by Friday noon			X	
	Update local and HQ spreadsheets			X	
	ADFD area microsite update			X	
	Update thermometer				
	Draft weekly message and provide to Area Commander/CO			X	
	Add extension announcement to message if necessary				
	ADFD Contributions & Assistance Spreadsheet report sent to Director and Coordinator			X	
	Coordinator delivers update to ADFD Chair			X	
March Cont'd		F50	COORD	*	**
4th WEEK	Deliver 3rd Transmittal command contribution message to Area Commander/CO including ADFD Extension Message if necessary			X	
	Area Commander/CO releases 3rd contributions update message to area commands			X	
	4th Transmittal turn in by Friday noon			X	
	Update local and HQ spreadsheets			X	

NOTE: \* Applies to all F50s \*\* Check items which are appropriate to your F50



## Checklist/Timeline (continued)

### NMCRS ACTIVE DUTY FUND DRIVE CHECKLIST - REGIONAL OFFICE APPROACH

OCTOBER		FSD	COORD	*	**
TBD	Meet with ADFD Chair (FO/GO/CAPT) to Review ADFD timeline, goals, kickoff event date for next year			X	
	Order ADFD Materials			X	
NOVEMBER		FSD	COORD	*	**
Early NOV	Chair releases ADFD call for Subarea Coordinators & Announcement of training dates message			X	
Late NOV	Deadline for naming Subarea Coordinators			X	
NOV - DEC		FSD	COORD	*	**
	Meet with ADFD Coordinator			X	
DECEMBER		FSD	COORD	*	**
Early DEC	FSD Hosts Training Session #1 for Regional ADFD Coordinator and Subarea Coordinators			X	
	-Introductions (FSD Director)			X	
	-Review ADFD manual, checklist, goal(s), procedures			X	
	-Review unit listings/Unit Codes for each subarea			X	
	-Identify deploying/deployed units			X	
	-Get count onboard # for each subarea, Verify POC list, review training schedule			X	
	-Place Training Session #1 ppt presentation on ADFD microsite			X	
JANUARY		FSD	COORD	*	**
Mid Jan	Ship materials (from HQ) to deployed units			X	
	Engage Region PAO to provide PA support through end of ADFD			X	
	FSD hosts Training Session #2			X	
	-Review ADFD Execution Timeline			X	
	-ADFD execution brief (Coordinator/treasurer)			X	
	-Distribute Assistance/contribution (by unit) report to all Subarea Coordinators			X	
	-Update count onboard #s for each Subarea			X	
	Place training Session #2 ppt presentation on ADFD microsite			X	
Late JAN	FSD hosts Training Session #3			X	
	-JAG Officer Provides Ethics Brief/Review Ethics Gram			X	
	-Review/Re-emphasize ADFD Execution Brief			X	
	-FSD Director(s) Review final unit listing/unit codes for each Subarea			X	
	Place training Session #3 ppt presentation on ADFD microsite			X	
FEBRUARY		FSD	COORD	*	**
1st WEEK	Training session #4 (Review)			X	
	-Distribute ADFD materials to Subarea coordinators			X	
	-FSD Director(s) Validate final unit listing/unit codes for each Subarea			X	
	-Review ADFD manual, checklist, goal(s), procedures, submission dates			X	
	Place all (4) ADFD Training presentations on local ADFD microsite			X	
2nd/3rd WEEK	Regional ADFD Chair hosts ADFD Kickoff Event			X	
3rd WEEK	Subarea Coordinators conduct training for Unit Coordinators			X	
	-Senior leaders provide keynote support			X	
	-Distribute ADFD materials to unit coordinators			X	
4th WEEK	Subarea Coordinators conduct unit level training for unit coordinators			X	
	-Senior leaders provide keynote support			X	
	-Distribute ADFD materials to unit coordinators			X	
	Regional ADFD Chair releases kickoff message to all SD area commanders			X	
MARCH		FSD	COORD	*	**
1st WEEK	ADFD Kicks off			X	
	Area Marqueses display ADFD info through end of ADFD			X	
1st-4th WEEK	Run NMCRS Slides/video at all Base Theaters through end of ADFD			X	
1st-4th WEEK	Run Weekly ADFD Note on Base "Top Passers" Message to all commands			X	
1st WEEK	Unit Coordinators turn in first weekly report to Subarea Coordinators (Thurs)			X	
2nd WEEK	Subarea Coordinators turn in first weekly donation report to Metro SD Overall Coordinator (Mon) and post to ADFD microsite			X	
	FSD Director(s) review/validate weekly Subarea reports submitted to Metro SD Overall Coordinator (nit Wed)			X	
2nd-4th WEEK	Weekly donation reports from Units to Subarea coordinators to Overall Coordinator to FSD Director(s)			X	
	Weekly turn in of allotment forms and transmittal forms to PSD			X	
MARCH CONT'D		FSD	COORD	*	**
2nd-4th WEEK	Weekly cash/check deposits to local ADFD bank account			X	
4th WEEK	ADFD Regional Chair sends progress report email/message to Subarea leadership			X	
	Weekly donation update of local ADFD Microsite			X	
APRIL		FSD	COORD	*	**
1st WEEK	ADFD Regional Chair determines if extension of ADFD is necessary and sends message			X	

NOTE: \* Applies to all FSDs \*\* Check items which are appropriate to your FSD



NAVY-MARINE CORPS  
RELIEF SOCIETY®

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