

Coast Guard Mutual Assistance



Strategic Plan

2018 – 2024

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INTRODUCTION

PURPOSE

This Strategic Plan provides the Vision and Mission statement for the Coast Guard Mutual Assistance Non-Profit Organization (CGMA). This plan outlines; the long-range goals, business objectives and provides a self-assessment score card for (CGMA).

BACKGROUND

Coast Guard Mutual Assistance, as we know it today, has a long history of helping the men and women of the United States Coast Guard. Established in 1924 by the wives of several Coast Guardsmen as the *League of Coast Guard Women*. The organization was to “minister to the general welfare of the commissioned officers, warrant officers, enlisted men and civilian employees of the Coast Guard and their immediate families.”

In 1941, *Coast Guard Welfare* was formally established and took over the mission from the League. In 1979, the name was changed to *Coast Guard Mutual Assistance*. CGMA incorporated in the Commonwealth of Virginia on January 1, 1998.

ACTION

This plan provides guidance to CGMA employees, the Board of Control (BOC) and Representatives in the performance of duties. It forms the basis for the development and implementation of new programs and the delivery of service under all programs. It also makes a commitment to our primary clients/customers and provides information that they can use in deciding to support CGMA. It is not a rigid formula, but rather a guide and a baseline to provide continuity and communication between the BOC and its primary clients/customers. It is the goal of the BOC to provide annual updates to the Strategic Plan.

MISSION

CGMA strives to promote financial stability and general well-being of the clients/customers it serves.

SECTION I – Vision

CHAPTER I

Coast Guard Mutual Assistance Vision 2024

VISION

As a recognized leader in promoting financial stability for its clients/customers, Coast Guard Mutual Assistance will seek to empower the Coast Guard family in meeting future financial challenges. Through partnerships with other assistance providers, we will deliver innovative financial assistance in response to emerging Coast Guard family needs. CGMA will ensure that we are always ready, and always there as a critical safety net in times of financial need and will truly look after our own.

CHAPTER II

Values, Philosophy, Principles, and Competencies

GUIDING PRINCIPLES

All actions of Coast Guard Mutual Assistance Board of Control members, Representatives and staff members are governed by the following principles:

1. To help members of the Coast Guard family achieve autonomous financial well-being.
2. To foster self-respect and self-worth.
3. To assure applications for financial assistance are treated confidentially.
4. To treat all members of the Coast Guard community in an honorable and respectful manner.
5. To provide assistance in a timely manner.
6. To consistently apply our guidelines and principles fairly and equitably to all.
7. To make decisions based on the merits of individual cases.

MEASURES AND IMPROVEMENTS

The following pages provide a strategic framework across all Mutual Assistance business lines to help guide effort across four main lines of effort:

1. Improve status and visibility
2. Review and sustain investment portfolio
3. Renew and establish relationships
4. Grow philanthropic giving and professionalizing development

Guiding Principles Scorecard

Are stakeholders engaged and effective?	Knowledge of Programs	Recognition	Diversification
Are the needs of the clients being met?	Education Assistance	Disaster and Emergency Assistance	Military, Client and Family Support
How does Mutual Assistance look to donors and clients?	Stability and Growth	Infrastructure and Reporting	Timeliness
What processes should improve? How is the culture?	Communications	Ease of Giving	Training: Field, Staff and Board

CHAPTER III

Primary Clients and Customer

CLIENTS/CUSTOMERS

The BOC considers these groups or individuals to be primary clients/customers of CGMA:

INTERNAL

- Board of Control Members
- CGMA Representatives
- CGMA Staff Members

EXTERNAL

- All Members of the Coast Guard Family (Primary Clients)
- Other Military Aid Societies and the American Red Cross
- Donors
- National Foundation for Credit Counseling (NFCC) and Member Agencies

SECTION II – Strategy

CHAPTER IV SWOT Analysis

STRENGTHS

- Records of the corporation are open to full disclosure for BOC members to access.
- Safeguarding of personal information.
- Protection of funds.
- BOC decision-making is subject to the make-up of the Board, with changing philosophies over time.
- Physical presence in over 130 locations Coast Guard-wide that offer quick local response to clients/customers.
- Authority and responsibility are distributed locally.
- Wide range of provided programs.
- Integrated automated financial systems.
- Adequate positive net worth.
- Active outreach initiatives.
- Quick response for disaster relief.
- Flexibility to adapt to changing client/customer needs.
- BOC represents a diverse cross section of the Coast Guard family.
- BOC is willing to expand/enhance/change/remove programs as deemed beneficial to clients/customers.
- Well-managed staff of professionals providing stability to organization.
- Strong working relationship with other Military Aid Societies (MAS) and the American Red Cross.
- Consistent history of contributions and donations.
- Constantly sound audited financial statements.

WEAKNESSES

- Outreach limitations.
- BOC decision-making is subject to the make-up of the Board, with philosophy swinging as membership changes.
- Training and knowledge of new and inexperienced CGMA Representatives, Assistant Representatives, Coast Guard commands and supervisors.
- Individual obligations and commitments prevent our volunteer BOC members from devoting more time to CGMA activities.
- Command philosophies that conflict with CGMA's mission.

OPPORTUNITIES

- Use personal testimonies to stimulate greater interest and contributions.
- Create new programs.
- Expand parameters of current programs.
- Enhance partnerships with external organizations.
- Increase client use of services which CGMA provides.
- Educate clients/customers about existing programs.
- Enhance leverage with existing Coast Guard networks to support our mission.
- Leverage new technologies to expand, educate, communicate and access.

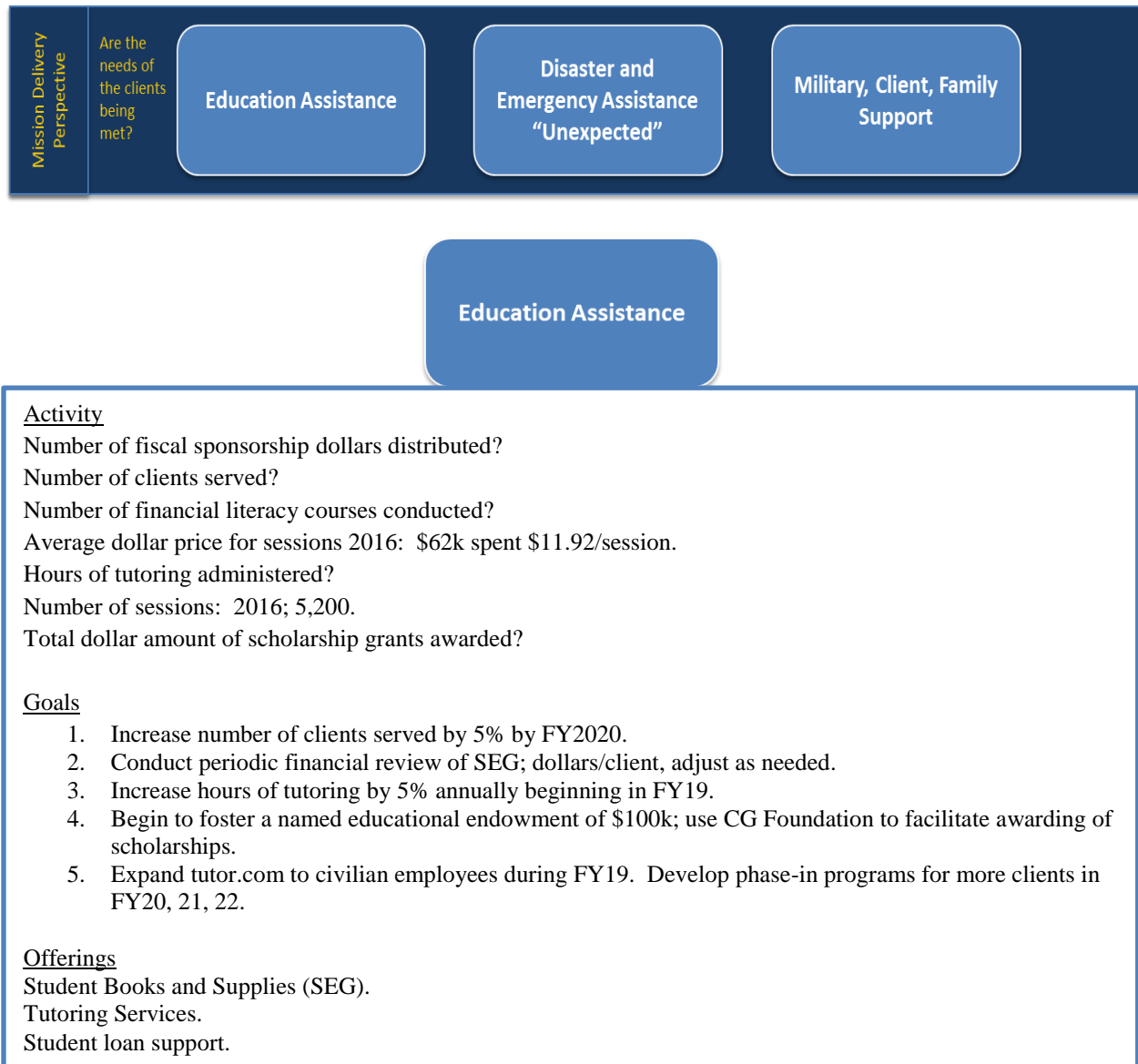
THREATS

- CGMA financial reserves could become inadequate.
- Changes in laws and regulations could severely impact the organization.
- Donor pool could decrease.
- The organization does not always meet client/customer “expectations”.
- Misperception and negative press could cause reduction in support.
- Poor economic conditions could cause reduction in monetary support.

CHAPTER V

Guiding Principles Score Cards

ARE THE CLIENTS NEEDS BEING MET?



**Disaster and
Emergency Assistance
“Unexpected”**

Activity

Number of clients served?

Number of new clients within the past 12 months?

Goals

1. Secure one resilience donor for FY19; seek at least \$5k.
2. Attend disaster preparedness symposium in 2018; liaison with stakeholders including Red Cross, FEMA, etc.
3. Review lessons learned from previous disaster season/ hold stakeholder summit.
4. Improve connectivity with Foundation and other non-profits through CG Disaster Relief Coalition.

Offerings

Home Damage.

Vehicle Repair.

Personal Property Loss.

Food Loss.

Emergency Travel.

**Military, Client, Family
Support**

Activity

Number of clients served?

Number of special needs cases supported?

Number of people provided assistive technology?

Average number of dollars per person served?

Total dollar amount of loans issued?

Number of new clients within the past 12 months?

Number of homebuyers/tenants with housing assistance?

Goals

1. Grow clients served by 5% during FY19-21.
2. Increase support to other non-profits by \$1000 during FY19.
3. Increase grants written and received by 2 during FY19; hire part time grant writer to assist.
4. Review and expand programs to civilian employees (PCS Child care, etc.).

Offerings

Baby Layette.

Special Needs Support.

Adoption.

Funeral.

Medication and Dental Expenses.

Closing Costs.

Bills/Expenses.

ARE STAKEHOLDERS BEING ENGAGED?



Goals

1. Measure knowledge of programs through survey of field during 2018-19. Implement changes during FY19.
2. Conduct at least one planned giving campaign during FY18; goal is 5 new donors.
3. Conduct needs assessment by FY19; address gaps during FY20.
4. Create electronic forms.
5. Discuss with FORCECOM opportunities to add check and balance to CGMA through assessments; understand if/ where CGMA resides in various school houses.
6. Work with local commands to educate CGMA staff on Coast Guard missions.
7. Reach out to other stakeholders (Auxiliary, CPOA, Navy League) to inform about programs. Seek strategic partnerships (United Through Reading, Navy Safe Harbor, Spouses, Ombudsmen, etc.).
8. Conduct full manual review; develop schedule for rolling 3-5 year cycle for updates; policy manual and user guides.
9. Leverage USAA Education Foundation for tools to assist.
10. Improve financial counselling touchpoints; follow up and QA.



Goals

1. Increase keyworker submissions for unit awards by 5%; conduct award training for keyworker by March19.
2. Develop keyworker award program.
3. Conduct Rep/Assistant Rep training during FY19.
4. Develop and implement staff award program during FY18.
5. Establish circles of giving during FY18.
6. Consider CGMA awards @ OCS, CGA, CPOA; “most philanthropic.” by 2021.
7. In FY19 Increase financial support by \$3000 for various awards (if establish awards program) :

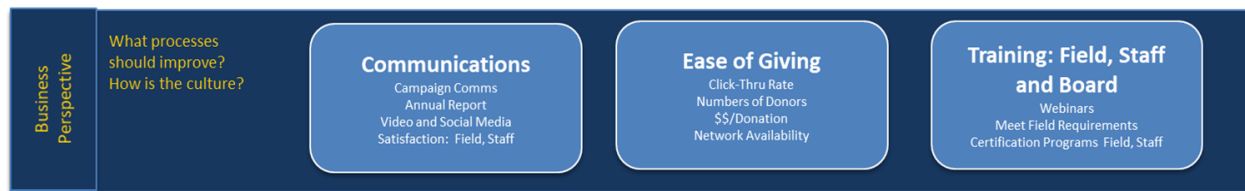
Diversification

Coast Guard Corporate Donors
Coast Guard Community Donors
Field Locations and Size

Goals

1. Increase members in each category in FY19:
 - i) Light Keepers: 1
 - ii) Buoy: 5
 - iii) Searchlight: 10
 - iv) Ships Bell: 3
2. Evaluate number and locations of representatives; make adjustments as needed (grow or collapse) in FY20.
3. Hold Advisory Panel by Dec 18; seek knowledge and input by Aug18. Improve knowledge of programs by Panel by 10%.
4. Consider process for Board elections to include regional members or other representative method during FY19.
5. Seek legal opinion regarding soliciting non-CG donors (external)
6. Expand networks:
 - i) Develop list of CG veteran owned businesses.
 - ii) Send CGMA info to Senior Service School.
 - iii) Send CGMA info to authors of various CG books.
 - iv) Send CGMA info to CG Art Program.

PROCESS IMPROVEMENT



Communications

Goals

1. Produce 2-4x year communications to appropriate audiences (retirees, civilians, etc.).
2. Build online support for annual campaign; receive each by 15 June annually.
3. Develop and deliver annual report by 1 July 2019; conduct stakeholder outreach campaign including senior leaders at CGHQ.
4. Review website design & navigation every 3 yrs.
5. Improve social media content; analyze click through rates and adjust monthly. Increase followers by 5%.
6. Baseline staff satisfaction through survey; improve satisfaction by 5% annually.
7. Attend 3 events (festivals, fairs, etc) to spread Mutual Assistance; establish baseline of contacts during FY19.
8. Develop infographics; determine use and locations.
9. Develop regional annual reports to commands/chiefs; provide overview of program, raise visibility of program delivered, and dollars donated.
10. Develop process for complaints on service by Aug 2019.
11. Target comms to coincide with active duty, reserve advancements and promotions by 2020
12. Refresh office art and artifacts.
13. Complete rebranding with USAA Ed Foundation.

Ease of Giving

Goals

1. Reduce verbiage on NFG to improve donations.
2. Review messaging on donations every 3 years.
3. Increase number of donors by 5% during FY19.
4. Increase \$\$/donation by 5% during FY19.
5. Improve availability of donation page to 95%.
6. Develop email distribution lists by FY2020.
7. Increase number of monthly contributions (allotment or credit card) by 10% to create 2% increase in revenue.
8. Select donor database, correction of existing data concerns; develop protocols for data entry, incorporate QA process.
9. Conduct full donor historical input to database during 2020.
10. Hire marketing/development and comms assistant in FY19.
11. Develop volunteer assistance program in 2019.

**Training: Field, Staff and
Board**

Goals

1. Conduct webinars and/or desk guide with best practices to meet keyworker training needs; increase attendance by 10%.
2. Conduct webinars and/or desk guide with best practices to meet representative and assistant representatives and new financial counsellors training needs; increase attendance by 10%.
3. Conduct annual board training by Aug18; increase knowledge of duties by 10%.
4. Respond to all field requests for training; schedule needs within 60 days.
5. Support staff, keyworker and representative/assistant rep certifications nlt Dec 2021.
6. Work with RFMC (YN) to determine if Mutual Assistance should be a functional requirement for the rating in FY2019. Alternatively examine E-6 EPME in leadership.
7. Build functional statements for keyworkers & assistant representatives; provide to CG-1 by 2021.
8. Consider a “First Sergeant” program for CGMA in 2020; puts Command Chief as local decision authority for assistance.

PERCEPTION



Stability and Growth

Goals

1. Ensure liquidity threshold is stable. \$100,000 per IPS.
2. Monitor asset allocation requirements.
3. Develop expense ratio (Operating expenses/total assets) and acceptable range.
4. Grow investments by 2% by end of FY19.
5. Keep budget to actual within 5% quarterly.
6. Assess all standing contracts to potentially lower costs; each year.
7. Review Investment Policy Statement every three years; complete first review in 2018.
8. Review investment advisor every seven years; consider RFP to solicit new in 2019.
9. Review bank contract every ten years; consider RFP to solicit new in 2021.
10. Track rate and amount of withdrawals from investment portfolios.

Infrastructure and Reporting

Goals

1. Reduce error corrections to less than 5%.
2. Staff review annual 990 by end of March.
3. Receive unqualified opinion on audit.
4. Improve Charity Navigator rating by end of FY18.
5. Improve Guidestar rating by end of FY18.
6. Conduct security assessment of infrastructure; reduce vulnerabilities by 90% by 1 November 2018 date.
7. Eliminate PII transmitted from PPC/NFC by 2019.
8. Fix telephone system at CGMA to meet requirements; lower costs.
9. Convey and communicate business model in succinct ways; keep overhead low (threshold 15%, ideal under 10%).
10. Keep a weather eye to government changes in allotment structures; discuss with other MSAs. Develop comms strategy if on the horizon; implement with minimum 24 months notice.

Timeliness

Goals

1. Produce and disseminate monthly financials by the 10th.
2. Prepare and hold appropriate board meetings; hold annual board offsite.
3. Disseminate audit results to board within 1 month of audit completion (Feb).
4. Annual report prepared and delivered by April annual meeting in 2020.
5. Review Finance Manual for updates every 3 years. Consider rewrites as needed.

CHAPTER VI

Conclusion

This Strategic Plan establishes the way-ahead for the Coast Guard Mutual Assistance Community Services organization, as well as our posture in the year 2024. It will be operationalized through the execution of detailed plans that are driven by established and Reportable timelines and performance measures. As a services-oriented organization, we will never waver in our commitment to our Stakeholders. We will ensure that our planning strategies stay abreast and predictive of future requirements in order to provide premier programs and services for all whom we are entrusted to serve: Our Coasties and their families.