

**Coast Guard Mutual Assistance  
Annual Fundraising Campaign 2024**

**Anchored in Service: 100 for 100**



**Campaign Coordinator  
Instructions**

## Introduction

For 100 years, Coast Guard Mutual Assistance has been helping Coast Guardsmen. From caring for Coast Guard widows and members returning from the First World War to serving those impacted by Hurricane Katrina and countless other storms, to more recent events like the 2019 Government Shutdown, and COVID-19 pandemic — CGMA has proved a sure and steady resource, providing a total of over \$240 million in direct support to individual Coast Guard members in need.

The Fundraising Campaign is held each year to generate revenue needed for CGMA programs. Without an annual infusion of funds, CGMA would deplete its resources and be unable to provide assistance. This is true of most charitable organizations. The campaign also provides an opportunity each year to publicize and reinforce awareness of CGMA and the array of assistance programs available.

This year, in recognition of these 100 years of extraordinary support of the Coast Guard community, we're challenging everyone to give back. **100 for 100.**

**Our goal this year is 100% unit participation. Starting an allotment of just \$1.00 a month has the power to make a lasting impact in the life of a struggling shipmate.**

Campaign Coordinators are responsible for running the campaign for their unit and ensuring face-to-face contact with all members. NOT just asking for money, but telling the story of CGMA, helping to ensure every member knows about our aid society's valuable resources and services. For large units with more than 50 people, Campaign Coordinators should recruit local Key Workers to assist with campaign efforts.

## Key Dates and Contact Information

The 2024 CGMA Fundraising Campaign will run 1 April to 30 April 2024.

**Throughout the campaign, important information will be passed via email.** If you have registered as a CGMA Campaign Coordinator you should already be receiving regular emails from CGMA-HQ staff ([campaign@mycgma.org](mailto:campaign@mycgma.org)). If you are not receiving these emails, please check your spam folder. If you confirm you are not receiving emails from CGMA-HQ, please contact us at [campaign@mycgma.org](mailto:campaign@mycgma.org) to verify your contact information.

**If you are not yet registered as a CGMA campaign coordinator**, please complete the registration form at [www.mycgma.org/annual-campaign](http://www.mycgma.org/annual-campaign).

Contact CGMA-HQ with questions at [campaign@mycgma.org](mailto:campaign@mycgma.org) or 703.581.5297.

### ✓ Checklist - Complete before the campaign begins 1 April 2024

#### Review Campaign Resources

CGMA-HQ has many resources available to assist and equip you in your campaign.

**All Campaign Resources will be available at [www.mycgma.org/annual-campaign](http://www.mycgma.org/annual-campaign)**

The *PowerPoint Presentation*, *FAQs*, and your job experience should prepare you to answer most questions about CGMA. Should questions arise that you need help to answer, contact CGMA-HQ for guidance then follow-up with those who asked. Additionally, the *Fundraising Guide* offers ideas for unit fundraising events.

### CGMA-HQ will provide:

- Fundraising Guide & FAQs
- Campaign Dashboard Report
- PowerPoint Presentation
- Pledge Forms (CGMA Form 33) – Mailed
- Sample Kickoff Remarks
- Campaign Brochures – Mailed
- Promotional Videos and Social Media Kit
- Campaign Posters – Mailed

#### **Participate in CGMA-HQ campaign calls**

CGMA-HQ hosts calls to support your planning, execution, and wrap up of the campaign. New Coordinators should especially prioritize participation.

#### **For Units with more than 50 people - Recruit and brief Key Workers**

Key Workers provide additional support throughout the campaign. If your unit is larger than 50 people or has multiple departments, Key Workers should be assigned to help share and disseminate Campaign information face to face with the individuals within their department or shop.

Ideally, at units where there are civilian employees, some of your Key Workers should be civilians. Key Workers should contact their Child Development Center (CDC) and Morale, Welfare, and Recreation (MWR) employees, as well as employees at Coast Guard Exchange Systems (CGES).

Emphasize the campaign goal of personally contacting **100%** of personnel at each unit.

After you have identified key workers at your unit send a completed list to [campaign@mycgma.org](mailto:campaign@mycgma.org). Please include rate/rank, first name, middle initial, last name and phone number. As changes occur, please send updates.

#### **Optional - Request Kick-off funds – [CGMA Form 32](#)**

Hosting a kick-off event is one of the best ways to publicize your Campaign, providing a forum to present the story of CGMA to as many people as possible. Funds may be used for decorations and refreshments (juice, coffee, donuts) for All Hands or another campaign specific gathering where high unit attendance is anticipated. Pre-approved Kick-off funds are available according to the following matrix:

Unit Size/Expected Attendance	Dollar Amount
25 or under	\$50
26-50	\$75
51-75	\$95
76-130	\$135
131-250	\$175
251-399	\$200
Over 400	\$250

These funds are *not intended* for fundraising events, i.e. car wash or bake sale. If a fundraising event has a related expense, please retain it from the proceeds.

**Kick-off Funds outside of the matrix must be approved in advance by CGMA-HQ.**

- For approval, email Erica Chapman, Fundraising Manger at [campaign@mycgma.org](mailto:campaign@mycgma.org)  
Or for questions call: 703.581.5297

#### **Guidelines for reimbursement of approved Kick-off funds:**

- Submit kick-off reimbursement request and scanned receipts of items purchased to  
Email: [campaign@mycgma.org](mailto:campaign@mycgma.org)
- Reimbursement is made via electronic payment (Zelle). Make sure to include personal email (used for banking) on the form.
- If a check payment is required, please include a note to that effect as well as addressee, and mailing address for payment when submitting reimbursement request.

#### **❑ Host Campaign Kick-off**

Download the PowerPoint Presentation and modify it to meet your local campaign needs. The PowerPoint Presentation, FAQ's and your job experience should prepare you to answer most questions about CGMA. Should a question arise that you can't answer, contact your local CGMA Representative for guidance, then follow-up with those who asked.

Kickoff events can be as creative as you like but should help provide a thorough overview of CGMA's programs and a clear introduction to the campaign.

#### **❑ Distribute campaign materials**

Sufficient materials are sent for each unit to have posters and for each member to receive a pledge form and brochure. Pledge forms and brochures should be personally handed to each member in your unit vs. simply leaving a stack for the taking.

Don't forget to include Child Development Center (CDC) and Morale, Welfare, and Recreation (MWR) employees, as well as employees at Coast Guard Exchange Systems (CGES) in your campaign efforts.

If you do not have a sufficient supply, contact CGMA-HQ [campaign@mycgma.org](mailto:campaign@mycgma.org) // 703.581.5297.

## **Collecting Donations**

Your CO/OinC has assigned you as a Campaign Coordinator for your unit approximately 20-50 people—perhaps more. If the idea of fundraising feels uncomfortable to you, you're not alone! Money is very personal and asking someone to donate can feel intrusive and uncomfortable. It doesn't have to be. In fact fundraising can be a lot of fun!

On an average day, CGMA provides over \$18,000 in assistance. When you ask people to consider making a gift to CGMA, you are actually offering them the opportunity to support their fellow Coasties. The Annual Fundraising Campaign allows CGMA to publicize and raise awareness about the variety of assistance programs available to the Coast Guard family, and raise the funds needed to sustain that work for years to come. The following resources will help guide you through the process of asking for donations. Additional resources can be found on the [campaign website](#).

### **Instructions for solicitation (Asking for donations)**

As the only non-federal entity statutorily recognized as the CG's Military Aid Society. (See 10 U.S.C. § 1033) Coast Guard employees are permitted to solicit funds for CGMA in their official capacity. See 5 C.F.R. 2635.808(b). COs/OINCs/supervisors and individuals may all use their official title, position and

authority to speak, write and encourage other members of the Coast Guard to encourage them to donate to CGMA. Donations always are the members' choice.

See page 4 of The full *Ethics Guiding Principles for Supporting Organizations* provided by COMDT (CG-LGL) for more information. This resource can be found on the [CGMA website](#). Your Servicing Legal Office can further assist you to determine the parameters for CGMA awareness and fundraising activities.

- JUST before you go to a particular office, email the occupants of that office the PDF versions of the Campaign Brochure, and Pledge Form.
- Your mission is to ensure all members (including Civilian and NAF employees) in your unit are **personally** contacted **on a one-on-one basis** and have sufficient information about CGMA programs to make an informed decision. This is an official, endorsed solicitation conducted at the work place--solicitations normally terminate with a "yes" or "no" to the question "**would you like to give?**"
- The number one reason people don't give is that they are never asked! Please remember that few people contribute until someone asks--you must ask the member if they want to contribute and respect their decision regarding privacy.
- Best practice is to collect one pledge form per person, even if they choose not to give. The question on the back of the 2024 CGMA pledge allows every member the opportunity to participate even if they choose not to give.
- Some potential contributors may ask how much they are expected to give. The answer is "However much you would like to give, but I do have a Giving Guide if you'd like to look at it." **NOTE:** *You should first ask if they'd like to give and leave the amount up to the individual. Only present the Giving Guide (p10) if asked the question above, or if directly asked for a giving guide. (Please don't refer to the giving guide amounts shown as a "fair share"—this term implies undue persuasion or coercion to some individuals.)*
- While deployed members may have to be contacted by e-mail, members who are in the local area must be contacted face-to-face. E-mail may and SHOULD be used to disseminate documents (IMMEDIATELY in advance of your visit); for additional and follow-up information but must NOT be used in place of a personal face-to-face (or, in the case of deployed members, "virtual" solicitation).

## Contribution Suggestion Order & Script Template

When you've finished telling the potential contributor about CGMA and its benefits, and you get to the question, "**Would you like to give this year?**" Please offer the three methods to **give in this order**:

- 1) Monthly Allotment/Bi-Weekly Payroll Deduction
- 2) Recurring Credit Card donation
- 3) One time donation via, credit card, check or cash.

Here is a sample script...not to memorize, but to familiarize yourself with how to approach potential donors:

**CAMPAIGN COORDINATOR:** Would you like to give this year? You can contribute by credit card, cash or check, or by allotment. Historically, the method about 85% of donors use is an allotment because you don't have to remember every month to give and there are no additional processing fees so 100% of your gift goes directly to CGMA. Allotments can be stopped or changed at any time.

### IF THEY SAY YES...

**POTENTIAL CONTRIBUTOR:** Ok, ya I can do like \$5 a month.

*CAMPAIGN COORDINATOR:* That's awesome. Thank you! When all of us contribute we have the power to make a big difference. Here's the pledge form. You'll receive a gift acknowledgement directly from CGMA for your tax records.

*Let them complete the form. Be sure to point out the opportunity to share why they are choosing to give on the back. Be sure to thank them again after they complete the form.*

#### **IF THEY SAY NO...**

*POTENTIAL CONTRIBUTOR:* No, I don't want anything else coming out of my pay check.

*CAMPAIGN COORDINATOR:* Well, as I was saying before, we can also accept donations by credit card, check, or cash. Even a small donation like \$10 when all of us give goes a long way. And that's just two coffees. I know you'd buy two fellow shipmates a cappuccino once a month!

*POTENTIAL CONTRIBUTOR:* Sure then. Let me do that.

*CAMPAIGN COORDINATOR:* Awesome! Thank you. (Then offer the QR code if they wish to give online, or have them complete the pledge form with their check or cash donation).

#### **IF THEY DO NOT WISH TO GIVE...**

*POTENTIAL CONTRIBUTOR:* No, I don't want to give this year.

*CAMPAIGN COORDINATOR:* Ok, no problem. Thank you so much for your time today.

### **Persuasion versus coercion.**

There is a difference between persuasion and coercion, and between promotion and pressure. The difference lies in the presence or absence of stated or implied threats. While COs/OINCs, supervisors and individuals may all use their official title, position, and authority to speak, write and encourage members of the Coast Guard to donation to CGMA, they may not establish an expressed or implied requirement to contribute as a condition of employment, as a condition of career progression, or for granting of normal privileges and entitlements. Whether or not the member contributes, and the amount they contribute (if any), is entirely up to them. Dollar or quota goals placed on individuals are not allowed. Your duties as a Campaign Coordinator require you ask or record private information, but disclosure of that information is limited to personnel who have a direct functional relationship to the campaign (e.g. Key Workers and CGMA Staff).

### **Ways to Give**

#### **By Allotment (*Preferred*)**

Donating by allotment remains the best and easiest way to give. Unlike a credit card donation which incurs a 4% processing fee, allotment gifts have no additional fees so 100% of your donation goes to the mission.

Allotments may be started or changed by using the form on the CGMA website: [mycgma.org/give-help](https://mycgma.org/give-help)

**NOTE:** *The minimum allotment donation amount is \$1.00. An employee ID is required to complete the allotment form.*

## By Credit Card

CGMA uses a platform called *Qgiv* to securely process credit card donations. If members would prefer to give by **credit card** they can visit: [mycgma.org/give-help](https://mycgma.org/give-help)

When making a gift via credit card, members should include:

- The name of their **current duty station**
- Five-digit **OPFAC number**

This information is required to track campaign results. If members choose not to include this information, their gift will still be counted to overall campaign results, but we will be unable to credit the gift to your unit totals.

## By Check

Check donations should be made out to **Coast Guard Mutual Assistance** and included with your summary report or mailed directly to:

Coast Guard Mutual Assistance  
Attn: CGMA Campaign  
1005 N. Glebe Rd, Ste 220  
Arlington, VA 22201

When making a gift by check, members should include:

- The name of their **current duty station**
- Five-digit **OPFAC number**

This information is required to track campaign results. If members choose not to include this information, their gift will still be counted to overall campaign results, but we will be unable to credit the gift to your unit totals.

## Proceeds from Fundraising Events

Local fundraising events are great ways to encourage people to give and help generate excitement about the CGMA Campaign. The [Fundraising Guide](#) provides examples of successful fundraising events from past campaigns.

If your unit held a fundraising event where you receive cash donations, you may use the following options to submit those donations:

1. Zelle electronic payment - (*Best Option*)
  - a. Login to your bank account.
  - b. Look for "Zelle" or "Transfer".
  - c. Send funds to [accountspayable@mycgma.org](mailto:accountspayable@mycgma.org).
  - d. **Important!** Put your **Unit Name and OPFAC** in the notes.
2. Money Order
  - a. Convert any cash donations to money order. Purchase a money order using the funds collected. Include receipt.
  - b. Make the money order out to CGMA or Coast Guard Mutual Assistance.
  - c. **Important!** Put your **Unit Name and OPFAC** on the memo line.
  - d. Send to:

Coast Guard Mutual Assistance  
Attn: CGMA Campaign  
1005 N. Glebe Rd, Ste 220, Arlington, VA 22201

3. Personal Check

- a. Make your check out to CGMA or Coast Guard Mutual Assistance.
- b. **Important!** Put your **Unit Name and OPFAC** on the memo line.
- c. Send it to:
  - Coast Guard Mutual Assistance
  - Attn: CGMA Campaign
  - 1005 N. Glebe Rd, Ste 220, Arlington, VA 22201

## Campaign Summary Report

### Campaign Summary Report

CGMA-HQ will update the [Campaign Dashboard](#) with donation totals each week. Donations made online will automatically be included in this report if the member includes your unit OPFAC with their online gift. The summary report should only reflect those donations that were physically handed to you (hard copy pledge forms or cash donations). Instructions on completing the summary report are below. Call CGMA-HQ (703.581.5297) with any questions.

### Steps to prepare Summary Report – *Please complete by 17 May 2024*

#### **Step 1: Collect cash and pledge forms** Be sure to safeguard contributions and all personal information.

- Completed *Pledge Forms* (CGMA Form 33)
- All checks and money orders.
- Convert any cash to Check or Money Order, payable to “CGMA.” Purchase a money order using the funds collected. Include the receipt.

**NOTE:** If you receive campaign pledges/contributions from Auxiliary, Retired, or Reserve members (non-civilian employees), then mark accordingly and include in your mailed package. They do not need to be captured in your summary totals. Please mail to CGMA-HQ.

#### **Step 2: Review and verify the proper completion of pledge forms (CGMA Form 33)**

- Ensure contribution **amount** is legible. Inspect the pledge forms for required information:
  - 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: Prepare Summary Report (CGMA Form 30)**

- Verify category totals and amount of money orders and checks:
  - **Active Duty Monthly Allotments Total**  
Total allotments contributed (number of forms) = Active Duty New + Increases
  - **Civilian Bi-weekly Payroll Deductions Total**  
Total deductions contributed (number of forms) = Civilian New + Increases
  - **Fundraising Event Proceeds**
  - **Cash Total** - Amount contributed by cash or personal checks

**NOTE:** DO NOT MAIL CASH. Convert any cash to Check or Money Order, payable to “CGMA.” Purchase a money order using the funds collected. Include the receipt.

- Complete the Summary Report (CGMA Form 30):



- The form can be completed online or downloaded by PDF at <https://mycgma.org/annual-campaign/>
- Enter the CGMA service unit name, OPFAC number and your contact information
- Enter the verified total amounts for Cash + Active Duty Allotment + Civilian Payroll Deductions.

#### **Step 4 : Submit Reports, Forms, and Donations by 17 May 2024**

##### **□ Send report, pledge forms and checks to CGMA-HQ:**

- Completed **Campaign Fundraising Report** (CGMA Form 30)
- **Checks and/or Money Orders** (no bills/coins)
  - ✓ Convert any cash donations to money order. Purchase a money order using the funds collected. Include the receipt.
- All original copies of *Pledge Forms* (CGMA Form 33) to CGMA-HQ
- Mail to:  
**Coast Guard Mutual Assistance**  
**Attn: CGMA Campaign**  
**1005 N. Glebe Road, Ste 220**  
**Arlington, VA 22201**

**NOTE:** Donations from Auxiliary, Retired, and Reserve members should be sent to CGMA-HQ with a note to mark them as such.

**Thanks to your efforts the 2024 Campaign will be a success!**

Send recommendations to improve these instructions to  
[campaign@mycgma.org](mailto:campaign@mycgma.org)

## SUGGESTED GIVING GUIDE

Pay Grade	2024 Monthly Pay*	Suggested % of Pay to Donate	2024 Suggested Annual Donation	2024 Suggested Monthly Donation
<b>Commissioned Officers</b>				
O-10	18,491.70	0.50%	\$1,110	\$92
O-9	18,096.00	0.50%	\$1,086	\$90
O-8	12,803.70	0.50%	\$768	\$64
O-7	10,638.90	0.50%	\$638	\$53
O-6	8,067.90	0.40%	\$387	\$32
O-5	6,725.70	0.40%	\$323	\$27
O-4	5,803.20	0.40%	\$279	\$23
O-3	5,102.10	0.30%	\$184	\$15
O-2	4,408.50	0.30%	\$159	\$13
O-1	3,826.20	0.20%	\$92	\$8
<b>COMMISSIONED OFFICERS WITH OVER 4 YEARS ACTIVE DUTY SERVICE AS AN ENLISTED MEMBER OR WARRANT OFFICER</b>				
O-3E	6,806.10	0.40%	\$327	\$27
O-2E	5,978.10	0.40%	\$287	\$24
O-1E	4,814.70	0.30%	\$173	\$14
<b>WARRANT OFFICERS</b>				
W-5	9,375.60	0.40%	\$450	\$38
W-4	5,273.10	0.40%	\$253	\$21
W-3	4,815.60	0.30%	\$173	\$14
W-2	4,260.90	0.30%	\$153	\$13
W-1	3,739.80	0.20%	\$90	\$7
<b>ENLISTED MEMBERS</b>				
E-9	6,370.50	0.50%	\$382	\$32
E-8	5,445.60	0.50%	\$327	\$27
E-7	3,624.90	0.40%	\$174	\$14
E-6	3,135.60	0.30%	\$113	\$9
E-5	2,872.20	0.30%	\$103	\$9
E-4	2,633.70	0.20%	\$63	\$5
E-3	2,377.50	0.20%	\$57	\$5
E-2	2,261.10	0.20%	\$54	\$5
E-1	2,017.20	0.20%	\$48	\$4