

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

Anchored in Service: 100 for 100



**Campaign Key Worker
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.

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 been registered as a Key Worker by your CGMA Campaign Coordinator you should already be receiving regular emails from CGMA HQ staff (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 to verify your contact information.

If you are not yet registered as a Key Worker, please complete the registration form at www.mycgma.org/annual-campaign.

✓ 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

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. Be sure to coordinate fundraising efforts with your Campaign Coordinator.

Your unit's Campaign Coordinator will provide you with mailed materials.

CGMA-HQ will provide:

- | | |
|--|---|
| <input type="checkbox"/> Fundraising Guide & FAQs | <input type="checkbox"/> Campaign Dashboard Report |
| <input type="checkbox"/> PowerPoint Presentation | <input type="checkbox"/> Pledge Forms (CGMA Form 33) – Mailed |
| <input type="checkbox"/> Sample Kickoff Remarks | <input type="checkbox"/> 2023 Campaign Brochures – Mailed |
| <input type="checkbox"/> Promotional Videos and Social Media Kit | <input type="checkbox"/> 2023 Campaign Posters – Mailed |

❑ Participate in CGMA HQ campaign calls

CGMA HQ hosts calls to support your planning, execution, and wrap up of the campaign.

❑ Distribute campaign materials

Your unit Campaign Coordinator will supply you with sufficient materials for each member in your shop or department to receive a pledge form and brochure. Get the materials into individual's hands vs. simply leaving a stack for the taking.

If you do not have a sufficient supply, contact your Campaign Coordinator.

Collecting Donations

As a Key Worker, you will serve as the primary contact for your department or shop, approximately 20-50 people. 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 are always 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 form 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 allotment, credit card, cash or check. 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 paycheck.

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 donate 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

We encourage everyone to give via online allotment or credit card donation if at all possible.

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:

<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: <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 be unable to credit the gift to your unit totals.

Links to all these pages are on the campaign website www.mycgma.org/annual-campaign

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 be unable to credit the gift to your unit totals.

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 and return to your Campaign Coordinator by 10 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 Key Worker Summary Report (CGMA Form 31)

- 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 Key Worker Summary Report (CGMA Form 31):
 - The form can be completed online or downloaded by PDF at www.mycgma.org/annual-campaign
 - Enter unit contact information and list the name of your Campaign Coordinator
 - Enter total number of Active Duty members and Civilian/CDC/MWR/CGES employees
 - Enter number of contributors and amount contributed for each line item

Step 4 : Submit materials to your lead Campaign Coordinator by 10 May 2024

- Completed *Key Worker Summary Report* (CGMA Form 31) – Keep a copy for your records.
- Checks and/or Money Orders (no cash)

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

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

SUGGESTED GIVING GUIDE

Grade	2023 Monthly Pay Chart*	Suggested % of Pay to Donate	2024 Suggested Annual Donation**	2024 Suggested Monthly Donation**
COMMISSIONED OFFICERS				
O-10	17675.10	0.50%	\$1,061	\$88
O-9	17201.40	0.50%	\$1,032	\$86
O-8	12170.70	0.50%	\$730	\$61
O-7	10113.00	0.50%	\$607	\$51
O-6	7669.20	0.40%	\$368	\$31
O-5	6393.30	0.40%	\$307	\$26
O-4	5516.40	0.40%	\$265	\$22
O-3	4849.80	0.30%	\$175	\$15
O-2	4190.70	0.30%	\$151	\$13
O-1	3637.20	0.20%	\$87	\$7
Cadet	1273.20	0.20%	\$31	\$3
WARRANT OFFICERS				
W-5	8912.10	0.40%	\$428	\$36
W-4	5012.40	0.40%	\$241	\$20
W-3	4577.70	0.30%	\$165	\$14
W-2	4050.30	0.30%	\$146	\$12
W-1	3555.00			
ENLISTED MEMBERS				
E-9	6055.50	0.50%	\$363	\$30
E-8	4957.20	0.50%	\$297	\$25
E-7	3445.80	0.40%	\$165	\$14
E-6	2980.50	0.30%	\$107	\$9
E-5	2730.30	0.30%	\$98	\$8
E-4	2503.50	0.20%	\$60	\$5
E-3	2259.90	0.20%	\$54	\$5
E-2	2149.20	0.20%	\$52	\$4
E-1	1917.60	0.20%	\$46	\$4