



COAST GUARD  
MUTUAL ASSISTANCE

2025 Annual  
Fundraising  
Campaign

# THE POWER OF US

CAMPAIGN COORDINATOR INSTRUCTIONS



# TABLE OF CONTENTS

Introduction .....	1
Your Role .....	1
Campaign Goals .....	1
Key Dates and Contact Information .....	2
Pre-Campaign Checklist .....	2
Campaign Action Checklist .....	4
Collecting Donations and Ways to Give .....	5
Ethics and Standards for Fundraising .....	5
Best Practices for Engaging Potential Donors .....	6
Ways to Give .....	6
Proceeds from Fundraising Events .....	7
Preparing and Submitting the Campaign Summary Report .....	8
Suggested Giving Guide .....	10





## INTRODUCTION

For 100 years, Coast Guard Mutual Assistance (CGMA) has been helping Coast Guard members. From caring for Coast Guard widows and those reacclimating after the First World War to serving those impacted by the 2019 Government Shutdown, the COVID-19 pandemic, and more recent events like Hurricane Helene and the California wildfires — CGMA has proved a sure and steady resource, providing a total of more than \$250 million in direct support to individual Coast Guard members in need.

Allotments among Active Duty Coast Guard members — which is the most important method of donation — have steadily declined at a pace of 877 allotments each year, or \$49,000 per year. During the last decade, the cumulative impact of this has been a 50% reduction in allotments. At this rate of decline, we will not be able to continue to provide the assistance the community has come to rely on at the level it's come to expect.

The CGMA Annual Fundraising Campaign is held each year to generate revenue needed for CGMA programs. Like most charitable organizations, without an annual infusion of funds, CGMA would deplete its resources and be unable to deliver assistance.

On an average day, CGMA provides more than \$27,000 in assistance. When you ask people to consider making a gift to CGMA, you are 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.



## Your Role

As a Campaign Coordinator, you are responsible for running the campaign for your unit and ensuring face-to-face contact with all members. NOT just asking for money, you provide value by telling the CGMA story, helping to ensure every member knows about our aid society's valuable resources and services.

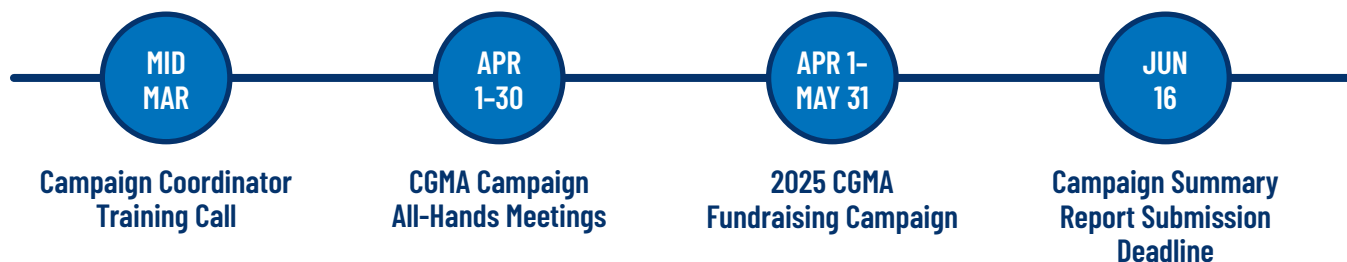
For large units with more than 50 people, you should recruit local [Key Workers](#) to assist with campaign efforts.

**NOTE:** If your unit has Key Workers in geographically distant locations (e.g., Campaign Coordinator in Baltimore, MD, and Key Worker in Alameda, CA), please contact CGMA to arrange for materials to be sent to each location and determine process for Key Worker Report, Pledge Form, and donation submission.

## Campaign Goals

- ✓ **Double Active Duty allotments** and increase overall giving
- ✓ **Connect with 100% of personnel** at each unit
- ✓ **Increase awareness of available programs and resources** for our Coast Guard family
- ✓ **Raise the funds needed to provide grants and loans** for Coast Guard members in need

## Key Dates and Contact Information



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

Contact CGMA-HQ with questions at [campaign@mycgma.org](mailto:campaign@mycgma.org) or (703) 581–5297.

**This Pre-Campaign checklist outlines key steps to help you prepare for a successful campaign. Use it to stay organized and ensure nothing is overlooked before launch.**

### PRE-CAMPAIGN CHECKLIST (COMPLETE BEFORE THE CAMPAIGN BEGINS APRIL 1, 2025)

#### □ Review Campaign Resources

CGMA's website, [mycgma.org](https://mycgma.org), offers a variety of resources to support and equip you for your campaign. All Campaign Resources are available on the [Campaign Coordinator Resources page](#).

The Campaign All-Hands PowerPoint Presentation, FAQs, and your [CGMA Representative](#) should help you answer most questions about CGMA.

Should questions that you need help answering arise, contact CGMA-HQ for guidance and then follow up with those who asked. Additionally, the [2025 Fundraising Guide](#) offers key messages, best practices, and ideas for unit fundraising events.

If you have Key Workers, please connect with them to coordinate fundraising efforts.

#### **CGMA-HQ will provide:**

- 2025 Fundraising Guide and FAQs (Online)
- Campaign All-Hands PowerPoint Presentation (Online)
- Sample Campaign All-Hands Remarks (Online)
- CGMA Annual Fundraising Campaign Video (Online)
- Campaign Dashboard Report (Online)
- Pledge Forms (CGMA Form 33) (Mailed)
- Campaign Posters and Flyers (Mailed)
- Social Media Kit (Online)

#### □ Participate in CGMA Campaign Coordinator Calls

CGMA-HQ hosts three calls to support your planning, execution, and campaign wrap up. All Campaign Coordinators — particularly new Coordinators should make participation a priority.

## ❑ Partner with Your CO/OIC/XO to Schedule and Prepare for the Campaign All-Hands Meeting with Your Unit

Access the 5-minute CGMA Annual Fundraising Campaign video and download it and the Campaign All-Hands PowerPoint Presentation. Modify the presentation to meet your local campaign needs. Should a question that you can't answer arise during the All-Hands, contact your local [CGMA Representative](#) for guidance and then follow up with those who asked.

## ❑ Distribute Campaign Materials

In mid-March, materials are sent to each unit, including posters and enough Pledge Forms and flyers for every member. Pledge Forms and flyers should be personally handed to each member in your unit rather than left in a stack for people to pick up. If you have not received your materials by March 24, please contact CGMA-HQ at [campaign@mycgma.org](mailto:campaign@mycgma.org) or call (703) 581-5297.

- Hang posters publicizing your campaign in high-traffic common areas, such as restrooms, break rooms, and entrance hallways.

## ❑ Recruit and Brief Key Workers — For Units with More Than 50 People

Key Workers play a crucial role in supporting the campaign. For units with 50 or more people, Key Workers should be assigned to help share and deliver campaign information directly to 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 reach out to their Child Development Center (CDC) and Morale, Welfare, and Recreation (MWR) employees, as well as employees at Coast Guard Exchange Systems (CGES), for additional support.

Emphasize the campaign goal of doubling Active Duty allotments, increasing overall contributions and reaching 100% of members 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.

At the end of the campaign, Key Workers should submit a Key Worker Summary Report to you along with all Pledge Forms and donations.\* Incorporate Key Worker Summary Report data into your Campaign Summary Report and send everything (including the Key Worker Summary Report and all Pledge Forms and donations) to CGMA-HQ.

*\*If your Key Workers are not co-located (e.g., Campaign Coordinator in Baltimore, MD, and Key Worker in Alameda, CA), please contact CGMA-HQ for further guidance on materials distribution and submission of donations and Pledge Forms. CGMA-HQ: phone: (703) 581-5297 or email to [campaign@mycgma.org](mailto:campaign@mycgma.org).*

## ❑ Optional: Request Kickoff Funds — [\(CGMA Form 32\)](#)

Hosting a kickoff 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 meetings or another campaign-specific gathering where high unit attendance is anticipated.

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 (e.g., car wash or bake sale). If a fundraising event has a related expense, please retain it from the proceeds.

Pre-approved Kickoff Funds are available according to the following matrix:

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

- For approval, email Erica Chapman, Fundraising Manager, at [campaign@mycgma.org](mailto:campaign@mycgma.org)
- For questions call: (703) 581-5297

**Guidelines for reimbursement of approved Kickoff Funds:**

- Submit your kickoff reimbursement request and scanned receipts of items purchased to [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.



## CAMPAIGN ACTION CHECKLIST

### ❑ Host Campaign All-Hands Between April 1–30

The campaign kicks off April 1, so early April, ideally before April 15, is the best time to hold your kickoff meeting. Your CO/OIC/XO should have previously scheduled a Campaign All-Hands meeting for you to kickoff the Campaign. Hosting your kickoff event during an All-Hands meeting is an excellent way to reach your entire team, maximize awareness and make sure everyone hears the same message at the same time.

Kickoff events can be as creative as you like but should give a thorough overview of CGMA's programs and a clear, engaging introduction to the Campaign. A great way to start your All-Hands meeting is by showing the CGMA 5-minute Annual Fundraising Campaign video. After the video, you can share the Campaign All-Hands PowerPoint Presentation and pass out materials, including Pledge Forms.

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.

Pledge Forms and flyers should be personally handed to each member in your unit during the kickoff.

If you do not have a sufficient supply of Campaign materials, contact CGMA-HQ by email: [campaign@mycgma.org](mailto:campaign@mycgma.org) or phone: (703) 581-5297.

### ❑ Connect Directly with Potential Donors

Have one-on-one conversations to encourage participation. See *Making the Ask* in the [2025 Fundraising Guide](#) for tips on how to talk about donating and leverage fundraising events to encourage donating.

### ❑ Collect Pledge Forms

Collect completed Pledge Forms throughout the Campaign and submit them with your [Summary Campaign Report](#) at the end of the Campaign.

### ❑ Organize and Hold Fundraising Events

Plan events to boost participation and raise additional funds. Refer to the [2025 Fundraising Guide](#) for ideas and inspiration.



## ❑ Complete and Submit Your Summary Campaign Report by June 16, 2025

Refer to the detailed instructions below for how to [prepare and submit your Campaign Summary Report](#). You will send checks, money orders, and pledge forms and the completed Summary Campaign Report to CGMA-HQ at:

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

## COLLECTING DONATIONS AND WAYS TO GIVE

If the idea of fundraising feels uncomfortable to you, you're not alone. Money is a personal topic, and asking someone to donate can feel intrusive. But it doesn't have to be. With the right approach, fundraising can be meaningful and even enjoyable!

The following resources will help guide you through the process of asking for donations. Additional resources can be found on the [CGMA Campaign website](#).

### Ethics and Standards for Fundraising

As the only non-federal entity statutorily recognized as the Coast Guard'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/OICs/XOs/supervisors and individuals may all use their official title, position and authority to speak, write and encourage other members of the Coast Guard to donate to CGMA.

- There is a clear difference between encouraging participation and applying undue pressure. Persuasion and promotion are acceptable, but coercion or implied threats are not.
  - While COs, OICs, XOs/supervisors, and others may use their official roles to encourage donations to CGMA, they cannot create any expressed or implied requirement to contribute as a condition of employment, career progression, or access to normal privileges and entitlements.
  - Contribution decisions, including whether to give and how much, are entirely up to the individual.
  - Dollar or quota goals for individuals are not permitted.
  - As a Campaign Coordinator, your role involves handling private information. This information should only be shared with personnel who have a direct role in the campaign, such as Key Workers or CGMA staff.

Read the full [CG Playbook Supporting Organizations \(Ethics Guiding Principles\)](#) provided by COMDT (CG-LGL) for more information. Your Servicing Legal Office can further assist you to determine the parameters for CGMA awareness and fundraising activities.



## Best Practices for Engaging Potential Donors

Effectively engaging potential donors is key to a successful campaign. This section provides practical tips and best practices for one-on-one interactions, ensuring all members receive the information they need to make an informed decision. Whether through face-to-face conversations, virtual meetings, or email follow-ups, your approach can inspire meaningful contributions while respecting each individual's choice. Refer to the [2025 Fundraising Guide](#) for additional guidance, including suggested conversation talking points, ideas, and inspiration.

- In advance of meeting with a particular office, share the PDF versions of the Annual Fundraising Campaign flyer and Pledge Form by either emailing the documents or including them in a meeting invitation so they are easily accessible during your visit.
- Your mission is to ensure all members in your unit, including civilian and NAF employees, are personally contacted one-on-one and provided with enough information about CGMA programs to make an informed decision. This is an official, endorsed solicitation conducted at the workplace — solicitations normally terminate with a “yes” or “no” to the question, “Would you like to give?”
- The main reason people don’t give is that no one asks them. Sometimes, all it takes is a simple, personal ask to inspire someone to contribute. Be sure to ask each member if they’d like to contribute and respect their decision, whether they choose to contribute or not.
- If someone asks how much they’re expected to give, respond: “However much you’d like to give. It’s totally up to you. I do have a [Giving Guide](#) with suggested donation amounts if you’d like to look at it.”
- Always ask first if they’d like to give and leave the amount up to them.
- Only share the [Giving Guide](#) if they specifically ask about amounts or seek guidance.
- Avoid referring to the [Giving Guide](#) amounts as a “fair share,” as this can feel coercive to some.
- Deployed members can be contacted via email and, if possible, through a virtual meeting. Local members should be engaged face-to-face. Email is great for sharing documents (ideally just before your visit), providing additional details, and following up — but it should not replace a personal conversation or a virtual meeting when feasible.



## Ways to Give

This section highlights different ways to contribute, including allotments and one-time donations. It also provides key details to ensure donations are accurately tracked.



### BY ALLOTMENT (PREFERRED) — WE ENCOURAGE ALL ACTIVE DUTY MEMBERS TO GIVE VIA ALLOTMENT

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 — 100% of your donation goes to the mission. As a reminder, at each unit, the goal is to double Active Duty allotments during the Campaign.

Allotments may be started or changed by using the form on the CGMA website:

[mycgma.org/give-help/allotment-payroll-deduction/](https://mycgma.org/give-help/allotment-payroll-deduction/)

**NOTE:** The minimum allotment donation amount is \$5.00. 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 like to give by credit card, they can visit: [mycgma.org/donate/](https://mycgma.org/donate/). **Credit cards can be used for one-time and recurring donations.**

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 towards overall Campaign results, but we will be unable to credit the gift to your unit totals.

While any donation is greatly appreciated, it's important to note that credit card donations incur a 4% processing fee. This means a portion of the contribution goes toward processing costs rather than directly supporting the mission. Be sure to share this with the donor and ask them to consider, if they're able, an allotment — it ensures their full donation reaches the cause.



## BY CHECK

Check donations should be made out to **Coast Guard Mutual Assistance** and included with your summary report or mailed directly with a completed pledge form 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 towards overall Campaign results, but we will be unable to credit the gift to your unit totals.

## Proceeds from Fundraising Events

Local fundraising events are a great way to inspire giving and build excitement for the CGMA Campaign.

The [2025 Fundraising Guide](#) provides fundraising event ideas, including examples of successful fundraising events from past campaigns.

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

## ZELLE ELECTRONIC PAYMENT (PREFERRED)

- Login to your bank account.
- Look for “Zelle” or “Transfer.”
- Send funds to [accounts@mycgma.org](mailto:accounts@mycgma.org).
- **Important!** Put your **current duty station name and OPFAC number** in the notes.

## MONEY ORDER

- Convert any cash donations to money order. Purchase a money order using the funds collected. Include receipt.
- Make the money order out to CGMA or Coast Guard Mutual Assistance.
- **Important!** Put your **current duty station name and OPFAC number** on the memo line.
- Send to:  
Coast Guard Mutual Assistance  
Attn: CGMA Campaign  
1005 N Glebe Rd, Ste 220  
Arlington, VA 22201

## PERSONAL CHECK

- Checks should be made out to CGMA or Coast Guard Mutual Assistance.
- **Important!** Put your **current duty station name and OPFAC number** on the memo line.
- Send to:  
Coast Guard Mutual Assistance  
Attn: CGMA Campaign  
1005 N Glebe Rd, Ste 220  
Arlington, VA 22201



## PREPARING AND SUBMITTING THE 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 for completing the Summary Campaign Report are provided below. If you need assistance completing the report or have any questions, call CGMA-HQ at (703) 581-5297 or via email to [campaign@mycgma.org](mailto:campaign@mycgma.org).

### Steps to Prepare Summary Report

Please Complete and Submit to CGMA by June 16, 2025

#### ☐ Step 1: Collect Cash and Pledge Forms (CGMA Form 33)

*Be sure to safeguard contributions and all personal information.*

- Completed Pledge Forms.
- 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), mark accordingly and include them in your mailed package. They do not need to be captured in your summary totals. Please mail to CGMA-HQ at Coast Guard Mutual Assistance, 1005 N Glebe Rd, Ste 200, Arlington, VA 22201.

❑ **Step 2: Review and Verify the Proper Completion of Pledge Forms (CGMA Form 33)**

*Be sure to safeguard contributions and all personal information.*

✓ **Ensure contribution amount is legible.** Inspect the Pledge Forms for the required information:

- Minimum donation: **\$5.00**
- Last four digits of the donor's Social Security Number or the entire Employee ID Number
- Signature of donor

❑ **Step 3: Prepare Campaign 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
- **Key Worker Total(s)**  
Add relevant totals from Key Worker report(s)

**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 ([mycgma.org/annual-campaign/](https://mycgma.org/annual-campaign/)) and completed offline.
- 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, including totals from the Key Worker Summary Report(s), if applicable.

❑ **Step 4: Mail Campaign Summary Report (CGMA Form 30), Forms, and Donations to CGMA-HQ by June 16, 2025**

✓ **Include** in your package:

- **Campaign Summary Report (CGMA Form 30)** and any **Key Worker Summary Report(s) (CGMA Form 31)**
- **All original copies of Pledge Forms (CGMA Form 33)**, including those collected from Key Workers
- **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.

✓ **Send** the above package to:

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

**THANKS TO YOUR EFFORTS, THE 2025 CGMA ANNUAL FUNDRAISING CAMPAIGN IS SURE TO BE A SUCCESS!**



# Suggested Giving Guide

Pay Grade	2025 Monthly Pay*	Suggested % of Pay to Donate	2025 Suggested Annual Donation	2025 Suggested Monthly Donation
COMMISSIONED OFFICERS				
O-10	\$18,808	0.50%	\$1,128	\$94
O-9	\$18,808	0.50%	\$1,128	\$94
O-8	\$16,748	0.50%	\$1,005	\$84
O-7	\$14,672	0.50%	\$880	\$73
O-6	\$12,328	0.40%	\$592	\$49
O-5	\$10,532	0.40%	\$506	\$42
O-4	\$9,265	0.40%	\$445	\$37
O-3	\$8,077	0.30%	\$291	\$24
O-2	\$6,216	0.30%	\$224	\$19
O-1	\$4,941	0.20%	\$119	\$10
COMMISSIONED OFFICERS WITH OVER 4 YEARS ACTIVE DUTY SERVICE AS AN ENLISTED MEMBER OR WARRANT OFFICER				
O-3E	\$8,810	0.40%	\$423	\$35
O-2E	\$7,183	0.40%	\$345	\$29
O-1E	\$6,053	0.30%	\$218	\$18
WARRANT OFFICERS				
W-4	\$8,387	0.40%	\$403	\$34
W-2	\$7,430	0.30%	\$267	\$22
W-2	\$6,531	0.30%	\$235	\$20
ENLISTED OFFICERS				
E-9	\$8,416	0.50%	\$505	\$42
E-8	\$6,932	0.50%	\$416	\$35
E-7	\$5,738	0.40%	\$275	\$23
E-6	\$4,682	0.30%	\$169	\$14
E-5	\$4,036	0.30%	\$145	\$12
E-4	\$3,272	0.20%	\$79	\$7
E-3	\$2,778	0.20%	\$67	\$6
E-2	\$2,363	0.20%	\$57	\$5
E-1	\$2,108	0.20%	\$51	\$4
GS EMPLOYEES				
Pay Grade	2025 Annual Pay*	Suggested % of Pay to Donate	2025 Suggested Annual Donation	2025 Suggested Bi-Monthly Donation
1	\$31,098	0.20%	\$62	\$3
2	\$32,834	0.20%	\$66	\$3
3	\$36,595	0.20%	\$73	\$3
4	\$40,988	0.20%	\$82	\$3
5	\$45,930	0.20%	\$92	\$4
6	\$51,286	0.30%	\$154	\$6
7	\$57,078	0.30%	\$171	\$7
8	\$63,315	0.30%	\$190	\$8
9	\$70,019	0.30%	\$210	\$9
10	\$77,214	0.40%	\$309	\$13
11	\$84,927	0.40%	\$340	\$14
12	\$97,752	0.40%	\$391	\$16
13	\$116,662	0.50%	\$583	\$24
14	\$138,254	0.50%	\$691	\$29
15	\$161,062	0.50%	\$805	\$34