



COAST GUARD
MUTUAL ASSISTANCE

2026 Annual
Fundraising
Campaign

THE POWER OF US



CAMPAIGN KEY WORKER INSTRUCTIONS

TABLE OF CONTENTS

Introduction	1
Campaign Goals	1
Key Dates and Contact Information	1
Pre-Campaign Checklist	2
Campaign Action Checklist	3
Collecting Donations and Ways to Give	4
Ethics and Standards for Fundraising	4
Best Practices for Engaging Potential Donors	5
Ways to Give	5
Preparing and Submitting the Key Worker Summary Report	7
Suggested Giving Guide	9



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 COVID-19 pandemic and more recent events including Hurricane Helene, the California wildfires and 2025 government shutdown — CGMA has proved a sure and steady resource, providing more than \$250 million in direct support to individual Coast Guard members in need.

Allotments among Active Duty Coast Guard members — the most important method of donation — have steadily declined over the last decade by approximately 50%. At this rate of decline, we will not be able to continue to provide the level of assistance the community has come to expect.

The CGMA Annual Fundraising Campaign generates vital revenue needed for CGMA programs to continue. Like most charitable organizations, without an annual infusion of funds CGMA would deplete its resources and be unable to deliver assistance.

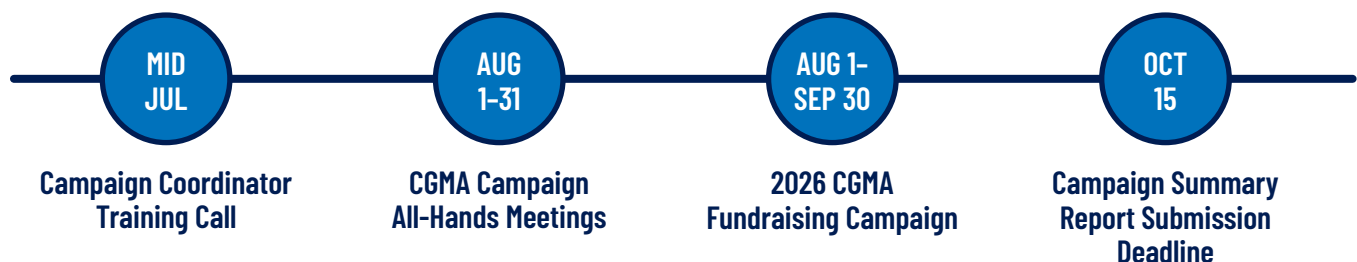
On an average day, CGMA provides more than \$27,000 in assistance. When you ask people to consider making a gift to CGMA, you are actually offering them the opportunity to support their fellow Coasties. The annual campaign also provides CGMA with the opportunity to raise awareness about the variety of assistance programs available to the Coast Guard family.



Campaign Goals

- ✓ **Increase the number of allotments by 3%** 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 passed via email. If your CGMA Campaign Coordinator has registered you as a Key Worker, you should already be receiving regular emails from CGMA-HQ staff at 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 mycgma.org/annual-campaign.

Contact CGMA-HQ with questions at 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 AUGUST 1, 2026)

□ Review Campaign Resources

CGMA's website, mycgma.org, offers a variety of resources to support and equip you for your campaign. All Campaign Resources are available at [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 [2026 Fundraising Guide](#) offers key messages, best practices, and ideas for unit fundraising events.

Be sure to coordinate fundraising efforts with your Campaign Coordinator.

CGMA-HQ will provide:

- 2026 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) *(Campaign Coordinator will provide)*
- Campaign Posters and Flyers *(Campaign Coordinator will provide)*
- Social Media Kit *(Online)*

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

Access the five-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 arise during the All-Hands that you can't answer, contact your local [CGMA Representative](#) for guidance and then follow up with those who asked.

□ Review recorded CGMA-HQ Campaign Coordinator calls

CGMA-HQ hosts three calls for Campaign Coordinators that will be recorded. These sessions cover planning, execution, and wrap-up of the campaign. **New Key Workers should make reviewing these recorded sessions a priority.**

❑ Receive and Distribute Campaign Materials

If you are co-located with your unit Campaign Coordinator, they will supply you with enough materials for each member in your shop or department to receive a Pledge Form and flyer.

If you are in another location and won't have direct contact with your Campaign Coordinator (e.g., Campaign Coordinator in Baltimore, MD, and Key Worker in Alameda, CA), please contact CGMA-HQ to arrange for materials to be sent to your location. CGMA-HQ: phone: (703) 581-5297 or email to campaign@mycgma.org.

After you receive your campaign materials, focus on getting them into the right hands:

- 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 do not have enough Pledge Forms or flyers, contact your Campaign Coordinator.

CAMPAIGN ACTION CHECKLIST

❑ Host Campaign All-Hands Between August 1–31

The campaign starts on August 1, so early August (before August 14) is the best time to hold your CGMA All-Hands meeting. 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.

Your All-Hands meeting 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 meeting.

If you do not have a sufficient supply of campaign materials, reach out to your Campaign Coordinator, or if you are not co-located, contact CGMA-HQ by email: 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 [2026 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 [Key Worker Summary Report](#) at the end of the campaign.

❑ Organize and Hold Fundraising Events

Plan events to boost participation and raise additional funds. Refer to the [2026 Fundraising Guide](#) for ideas and inspiration.

❑ Complete and Submit Your Key Worker Summary Campaign Report (CGMA Form 31) by October 15, 2026, to Your Campaign Coordinator*

Refer to the detailed instructions below for how to prepare and submit your [Key Worker Summary Report](#). You will send checks, money orders, and Pledge Forms and the completed Key Worker Summary Report to your Campaign Coordinator no later than October 15, 2026.

**If you are not co-located with your Campaign Coordinator (e.g., Campaign Coordinator in Baltimore, MD, and Key Worker in Alameda, CA), please reach out to CGMA-HQ for guidance on submitting the Key Worker Summary Report, Pledge Forms, and donations.*

CGMA-HQ: phone: (703) 581-5297 or email to campaign@mycgma.org.

COLLECTING DONATIONS AND WAYS TO GIVE

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 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 encourage them 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 Key Worker, your role involves handling private information. This information should only be shared with personnel who have a direct role in the Campaign, such as Campaign Coordinators 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

- 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/

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/. **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 to 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 to overall campaign results, but we will be unable to credit the gift to your unit totals.

PREPARING AND SUBMITTING THE KEY WORKER SUMMARY REPORT

Key Worker Summary Report (CGMA Form 31)

CGMA HQ will update the Campaign Dashboard with donation totals for your entire unit each week. Donations made online will automatically be included in this report if the member includes your unit OPFAC with their online gift. The Key Worker Summary Report should only reflect those donations that were physically handed to you (hard copy Pledge Forms or cash donations). Instructions on completing the Key Worker Summary Report are 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.

Steps to Prepare Key Worker Summary Report Please complete and submit to your Campaign Coordinator by October 15, 2026

□ 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 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
 - **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 Key Worker Summary Report ([CGMA Form 31](#)):

- The form can be completed online or downloaded (mycgma.org/annual-campaign/) and completed offline.
- 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 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: Submit Materials to Your Lead Campaign Coordinator by October 15, 2026***

✓ **Include** in your package:

- **Key Worker Summary Report(s) ([CGMA Form 31](#))** — keep a copy for your records
- **All original copies of Pledge Forms ([CGMA Form 33](#))**

**If your Campaign Coordinator for your unit is not co-located (e.g., Campaign Coordinator in Baltimore, MD, and Key Worker in Alameda, CA), please contact CGMA-HQ for further guidance on submitting donations and Pledge Forms. CGMA-HQ: phone: (703) 581-5297 or email: campaign@mycgma.org.*

If you are co-located with your Campaign Coordinator, do NOT send Key Worker Report, Pledge Forms, checks, or money orders to CGMA-HQ.

THANKS TO YOUR EFFORTS, THE 2026 CGMA ANNUAL FUNDRAISING CAMPAIGN IS SURE TO BE A SUCCESS!

Suggested Giving Guide

Pay Grade	2026 Monthly Pay*	Suggested % of Pay to Donate	2026 Suggested Annual Donation	2026 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	\$9,168	0.40%	\$423	\$37
O-2E	\$7,455	0.40%	\$345	\$30
O-1E	\$6,281	0.30%	\$218	\$19
WARRANT OFFICERS				
W-4	\$8,790	0.40%	\$403	\$35
W-2	\$7,775	0.30%	\$267	\$23
W-2	\$6,819	0.30%	\$235	\$20
ENLISTED MEMBERS				
E-9	\$8,852	0.50%	\$505	\$44
E-8	\$7,191	0.50%	\$416	\$36
E-7	\$5,953	0.40%	\$275	\$24
E-6	\$4,859	0.30%	\$169	\$15
E-5	\$4,255	0.30%	\$145	\$13
E-4	\$3,735	0.20%	\$79	\$7
E-3	\$3,172	0.20%	\$67	\$6
E-2	\$2,697	0.20%	\$57	\$5
E-1	\$2,407	0.20%	\$51	\$5
GS EMPLOYEES				
Pay Grade	2026 Annual Pay*	Suggested % of Pay to Donate	2026 Suggested Annual Donation	2026 Suggested Bi-Monthly Donation
1	\$29,510	0.20%	\$59	\$2
2	\$32,729	0.20%	\$65	\$3
3	\$36,210	0.20%	\$72	\$3
4	\$40,646	0.20%	\$81	\$3
5	\$45,475	0.20%	\$91	\$4
6	\$50,692	0.30%	\$152	\$6
7	\$56,331	0.30%	\$169	\$7
8	\$62,383	0.30%	\$187	\$8
9	\$68,905	0.30%	\$207	\$9
10	\$75,876	0.40%	\$304	\$13
11	\$83,369	0.40%	\$333	\$14
12	\$99,923	0.40%	\$400	\$17
13	\$118,821	0.50%	\$594	\$25
14	\$140,412	0.50%	\$702	\$29
15	\$165,159	0.50%	\$826	\$34