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## A. Introduction

Coast Guard Mutual Assistance (CGMA) is the official relief society for the United States Coast Guard. In accordance with CGMA's Articles of Incorporation, Bylaws, manuals, and policies and procedures, CGMA provides financial assistance to members of the Coast Guard family.

CGMA is incorporated in the Commonwealth of Virginia and is recognized by the Internal Revenue Service as a 501(c)(3) tax exempt, non-profit, charitable organization.

The Board of Control, located at Coast Guard Headquarters in Washington, DC, provides oversight of Coast Guard Mutual Assistance.

Daily operation of Coast Guard Mutual Assistance is accomplished by Coast Guard Mutual Assistance Headquarters staff located in Arlington, VA, along with Representatives at selected Coast Guard units throughout the country.

## B. History

CGMA has a long history of helping the men and women of the United States Coast Guard.

Originally established in 1924 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 was incorporated in the Commonwealth of Virginia on January 01, 1998.

Today, CGMA offers aid to the entire Coast Guard family; active duty and retired Coast Guard military personnel, members of the Coast Guard Reserve, Coast Guard civilian employees, Coast Guard Auxiliary members, and Public Health Officers serving with the Coast Guard. Assistance may be provided on behalf of themselves and their immediate family members.

### **C. Purpose**

Coast Guard Mutual Assistance is organized exclusively for charitable and educational purposes consistent with the Section 501(c)(3) of the Internal Revenue Code and may make expenditures for one or more of these purposes:

- To relieve the distress of eligible personnel of the United States Coast Guard by providing financial aid, in time of certain emergency, housing, and medical needs
- To provide for educational assistance to eligible personnel of the United States Coast Guard
- To perform any other activities or services necessary or desirable to carry out such purposes to the extent permitted by the Code, or the corresponding provision of any future United States Internal Revenue law

Coast Guard Mutual Assistance aspires to provide financial stability and promote the general well being of the people it serves. In general, assistance is provided through counseling, financial grants, interest-free loans, and other related means.

### **D. Mission**

Coast Guard Mutual Assistance strives to promote financial stability and general well being of the people it serves.

### **E. Vision**

As a recognized leader in promoting financial stability for its clients, 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. We will ensure that we are always ready, and always there as a critical safety net in times of financial need. We will truly look after our own.

### **F. Goals**

While giving strong consideration to the fiscal constraints imposed upon the organization, CGMA will provide maximum assistance to the largest number of individuals, expanding and improving current programs, removing or easing restrictions, and increasing limits.

## G. Guiding Principles

Coast Guard Mutual Assistance seeks to help members of the Coast Guard family achieve autonomous financial well being.

- CGMA fosters self-respect and self-worth
- We assure applications for financial assistance are treated confidentially
- We treat all members of the Coast Guard family seeking information or applying for assistance in an honorable and respectful manner
- We provide assistance in a timely manner
- We consistently apply our guidelines and principles fairly and equitably to all clients
- We make decisions based on the merits of the individual cases

## H. Confidentiality

Individuals contacting Coast Guard Mutual Assistance have the right to expect that their personal information will remain private. Coast Guard Mutual Assistance Representatives and employees will not discuss personal information with others, nor will they divulge such matters to anyone, except on a need-to-know basis.

However, this policy will not prevent CGMA from verifying information and confirming facts before providing financial assistance. Nor will this right to privacy apply to information about a crime, serious misconduct, or anything that could affect good order, discipline, or security.

In accordance with state and federal law, information concerning suspected incidents of any form of family violence or abuse (physical, sexual, emotional, neglect, etc.) to a child, spouse, live-in partner, parent or sibling will be reported immediately to the appropriate Family Advocacy Specialists.

Case history information may be provided to the CGMA client only, not to the spouse or other family members.

Approval from CGMA Headquarters must be obtained prior to the release of client information to any other organization. CGMA will cooperate with federal, state and local government agencies. CGMA will not release private information without the client's permission except in response to a court order, subpoena, or formal official investigation by proper civilian or military authorities.

Coast Guard Mutual Assistance is not subject to the requirements to release information under the Freedom of Information Act (FOIA) because:

- CGMA is not a government agency
- Information obtained is used only in the internal decision-making process of CGMA
- CGMA is **not** a “for-profit” organization where the information obtained will be used to generate income

## **I. Additional Information**

Questions, comments and recommendations concerning this chapter should be directed to the CGMA-HQ Executive Director or Director of Finance. (See paragraph 2-D-2 for CGMA-HQ contact information.)