Coast Guard Mutual Assistance
Campaign 2020

Lead Campaign Coordinator
Preparation Instructions

Ready // Relevant // Responsive
The 2020 CGMA Fundraising Campaign will run 1 April to 30 April 2020.
This quick reference provides preparation instructions for coordinating the campaign for your CGMA Area of Responsibility (AOR). Please refer to the accompanying 2020 Fundraising Guide as well.
Contact CGMA-HQ (703.581.5297 // campaign@cgmahq.org) with questions.

☑ Checklist - Complete before the campaign begins 1 April 2020

☐ Verify the list of CGMA Service Units assigned within your CGMA AOR
   To view your assigned service units: www.CGMAHQ.org/campaign
   Or log into netFORUM ⇒ Rep Site profile ⇒ “More” tab ⇒ “Relationships” ⇒ scroll to “Related Organizations”
   **Report discrepancies to CGMA HQ: Erica.Chapman@cgmahq.org**

☐ Designate and brief local Key Workers for your unit and units in your AOR.
   Emphasize the campaign goal of personally contacting 100% of personnel at each unit.
   After you have identified key workers at your unit and at outlying units in your CGMA AOR, please enter their names directly into netFORUM.
   -- OR --
   Send a completed list to Erica.Chapman@cgmahq.org. Please include rate/rank, first name, middle initial and last name. As changes occur, please send updates.

☐ Review Campaign Resources
   CGMA HQ has many resources available to assist and equip you and your local key workers in your 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.
   **CGMA-HQ will provide:**
   - List of Service Units
   - Preparation Instructions
   - Fundraising Guide & FAQs
   - PowerPoint Presentation
   - Sample Kickoff Remarks
   - Promotional Videos and Social Media Kit
   - Summary of 2019 Assistance and Giving Pledge Forms (CGMA Form 33) – Mailed
   - 2020 Campaign Brochures – Mailed
   - 2020 Campaign Posters – Mailed
   - Wrap-Up Instructions
   - Lead Campaign Coordinator Report (CGMA Form 30)
   - Local Key Worker Report (CGMA Form 31)

All Campaign Resources will be available at www.CGMAHQ.org/campaign
Distribute campaign materials to Key Workers as they become available.

CGMA-HQ will provide campaign materials to supply your unit and the Service Units in your AOR. For units with larger AORs, materials may arrive in multiple shipments. Sufficient materials are sent for each unit to have posters and each member can receive a pledge form and brochure.

If you do not receive your materials or have an insufficient supply, contact CGMA HQ at Erica.Chapman@cgmahq.org // 703.581.5297

Provide to your local Key Workers:

<table>
<thead>
<tr>
<th>Before 1 April:</th>
<th>Before 30 April:</th>
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<tbody>
<tr>
<td>❑ Fundraising Guide</td>
<td>❑ Key Worker’s Wrap-Up Instructions</td>
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<tr>
<td>❑ Key Worker’s Preparation Instructions</td>
<td>❑ Key Worker Campaign Report (CGMA Form 31)</td>
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<td>❑ Pledge Forms (CGMA Form 33)</td>
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Request Kick-off funds – [CGMA Form 32]

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.

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 must be approved in advance by CGMA-HQ.

- For approval, submit CGMA Kick-off Funds Request (CGMA Form 32) to CGMA HQ:
  Email: Erica.Chapman@cgmahq.org
  Or for questions call: 703.581.5297

Guidelines for reimbursement of approved Kick-off funds:

- Submit endorsed kick-off request and scanned receipts of items purchased to CGMA-HQ
  Email: campaignexpenses@cgmahq.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.

Thanks to your efforts the campaign will be a success!