

# Chapter Management Roundtable

Aug 14, 2024



# Chapter Health v. Effectiveness

# Health V. Effectiveness

A healthy chapter is an organization that is able to sustain itself over time.

An effective chapter is one that positively impacts MOAA's mission.

# MOAA's Mission

To preserve and protect earned benefits for our uniformed services, veterans, their families, and surviving spouses through advocacy, leadership, education, and service.



# Chapter Health v. Effectiveness

Why does this matter?

- Identifying those at risk across a vast affiliate network
- Understanding our local impact
- Identifying challenges, sharing successes
- Developing resources and strategies
- Keeping our Mission as our North Star

# Assessing Health and Effectiveness

- Need to identify the right objective data
- Understand gaps between where we think you are and the reality of how each affiliate is operating
- Take a more holistic approach to include survey data, leadership meetings, etc
- Recognize differing levels of resources
- Not trying to recreate awards criteria
- Address basic health to improve effectiveness and impact

# CCA Areas of Focus

- Leadership
- Membership
- Community Outreach
- Advocacy

# Leadership





# Leadership

## Health

- Keeps key officer positions filled
- Officers opted-in to MOAA newsletter
- Submits for MOAA LOE and Communications awards
- Nominates for Strobridge, SS, and individual awards
- Ensures messaging is non-partisan
- Has a bank account and EFT set up

## Effectiveness

- Has a leadership succession plan
- Understands and shares MOAA priorities
- Implements best practices and communicates well
- Recognizes and celebrates members' efforts
- Welcomes diverse perspectives
- Funds meaningful projects with MOAA stipends, grants

# Leadership

## Health

- Develops budget and regularly reviews finances
- Develops meeting agendas and plans ahead
- Participates in MOAA training opportunities
- Requests visits from MOAA national
- Participates in council activities (if there is one)

## Effectiveness

- Prioritizes resources with annual budget and strategy
- Stays focused on MOAA's mission
- Shares ideas and helps mentor new leaders
- Engages with MOAA staff and leaders as a team
- Collaborates with other chapters

# Membership



# Membership

## Health

- Promotes camaraderie and maintains a steady membership
- Uses the Committee Module to update rosters
- Accesses the Near Real Time (NRT) Report to see prospects
- Participates in MOAA membership incentive program

## Effectiveness

- Implements strategies to recruit new members and grows membership
- Identifies and tracks membership trends
- Develops specific recruitment activities to draw in new members
- Promotes the value of paid MOAA membership

# Membership

## Health

- Honors MOAA new paid member vouchers for free chapter membership
- Has a website and a newsletter for sharing information
- Has active social media account(s)
- Encourages members to opt-into TMN
- Hosts regular meetings

## Effectiveness

- Invites MOAA members in catchment area to events (CCA supported)
- Shares current and relevant details on issues and events; earns awards
- Engages with younger members in real-time
- Underscores the value of MOAA membership
- Engages members with speakers

# Advocacy



# Advocacy

## Health

- Designates a legislative chair or liaison
- Ensures that key leaders are signed up for the MOAA Legislative Action Center
- Supports council representation at AiA
- Participates in the State Legislative Exchange Network

## Effectiveness

- Discusses legislative priorities as a chapter
- Encourages all members to amplify the voice of MOAA and impact legislation via the LAC
- Humanizes MOAA priorities on Capitol Hill
- Collaborates across chapters on legislative challenges and successes



# Community Outreach





# Community Outreach

## Health

- Organizes meaningful events for members in the community
- Submits for MOAA stipends and grants
- Raises funds or provides scholarships for ROTC, JROTC, etc
- Interacts, partners with other VSOs, MSOs

## Effectiveness

- Represents MOAA in the community, promotes the MOAA brand
- Implements strategy to make the most impact
- Promotes an all-volunteer force, awareness of MOAA
- Positions MOAA as part of the broader local military community

# Community Outreach

## Health

- Supports and helps promote the opportunities available through MOAA Charities
- Promotes MOAA Scholarship Fund for the children of members
- Shares information on Crisis Relief Program for all ranks, all services
- Coordination of programs for surviving spouses, career transitions, etc

## Effectiveness

- Connects MOAA Foundation and Scholarship Fund with those in need
- Honors family sacrifices that may make other scholarships challenging
- Underscores that we are an organization of officers, not for officers
- Establishes MOAA as a trusted resource at all life stages



# Tracking Chapter Health ...and then what?

# Tracking

- Who are our affiliates?
- What type of affiliate are they?
- How many of each type do we have?
- What is their current operating status?
- Where are they in terms of health?
  - What does the objective data say?
  - What can we learn from discussions, trip reports, survey responses, etc?
- How do we create a fuller understanding of chapter health?

# New Tracking System

smartsheet

Q co

File Automation Forms Connections Dynamic View

Example of Council and Chapter Health ☆

Grid View Filter Off Arial 10 B I U S % A

	STATE/ALIAS (Blue=No Council)	NAME	OPERATING STATUS	TYPE	HEALTH ASSESS... (need to reassess)	HEALTH SCORE (as of 3/29/24)	MENTOR ASSIGN...	CLOSURE PROGRESS (update with most recent action)	CHAPTER LETTER DATE (indicating intent to close)	OFFICIALLY CLOSED
1	<b>FRUIT STATE</b>									
2	FR00	FRUIT COUNCIL OF CH	Active	Council	Healthy					
3	FR01	Apple Chapter	Active	Geo	Stable	67				
4	FR02	Banana Chapter	Active	Geo	Healthy	98				
5	FR03	Cherry Chapter	Active	Geo	Healthy	82				
6	<b>VEGGIE STATE</b>									
7	VG01	Pepper Chapter	Active	Geo Independ	Healthy	98				
8	<b>PASTA STATE</b>									
9	PS00	PASTA COUNCIL OF CH	Active	Council	Stable					
10	PS01	Spaghetti Chapter	Active	Geo	At-Risk	58	Colonel Sanders			
11	PS02	Lasagna Chapter	Unknown	Geo Is not inv	Stable	79		Unsure/Council suspects closure		
12	PS03	Linguini Chapter	Active	Geo	Healthy	98				
13	PS04	Ravioli Chapter	Inactive	Geo	At-Risk	52	Captain Crunch	Revitalization planned	6/15/24	
14	PS05	Ramen Chapter	Deactivated/CLC	Geo					11/3/2023	1/1/2024
15	PS06	Fettuccini Chapter	Unknown	Geo	Healthy	90				



# Broadening Our Assessment

smartsheet

Search...

File Automation Forms Connections Dynamic View

Example of Council and Chapter Health ☆

Grid View Filter Off Arial 10 B I U

	STATE/ALIAS (Blue=No Council)	NAME	OPERATING STATUS	TYPE	HEALTH ASSESS... (need to reassess)	HEALTH SCORE (as of 3/29/24)	MENTOR ASSIGN...	CLOSURE PROGRESS (up with most recent action)
1	<b>FRUIT STATE</b>							
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14	PS05	Ramen Chapter	Deactivated/CLC	Geo				
					COUNT: 7	SUM: 79	AVG: 79	

## Attachments

Row Sheet All

Row 11: PS02

Actions ↑↓ Uploaded (newest)

2024 Survey Results for the...  
Row 11  
07/22/24, 11:29 AM by Dena ...

Example Speaker Trip Repor...  
Row 11  
07/22/24, 11:27 AM by Dena ...

Inactive Chapter.msg

Attach Files to Row 11



# Understanding At-Risk Affiliates

- What are the challenges?
- Is the council involved?
- What resources can we share?
- Can we connect you to a mentor?
- Can we help support revitalization efforts?
- Is closure imminent? If so, what are the next steps?
- How can we ensure members stay connected?

# Developing a Gameplan

HEALTH ASSESS... (need to reassess)	HEALTH SCORE (as of 3/29/24)	MENTOR ASSIGN...	CLOSURE PROGRESS (update with most recent action)	CHAPTER LETTER DATE (indicating intent to close)	OFFICIALLY CLOSED
Healthy					
Stable	67				
Healthy	98				
Healthy	82				
Healthy	98				
Stable					
At-Risk	58	Colonel Sanders			
Stable	79		Unsure/Council suspects closure		
Healthy	98				
At-Risk	52	Captain Crunch	Revitalization planned	6/15/24	

- Revitalization requested
- Revitalization planned
- Unsure/Council suspects closure
- Chapter shared intent to close
- Marked inactive in MOAA's system
- Chapter letter received
- Closed in MOAA's system
- Closure letter sent from CCA



# Our Goals

- Better understand how to evaluate health v. effectiveness
- Help you with basic health so you can be most effective
- Develop strategies to assist at-risk chapters
- Have a dialogue on how to improve impact

# Effectiveness Discussion

When do you feel most effective as a chapter (or council)?

What could an effective mentoring relationship accomplish for chapter leaders?

# Recruitment Discussion

How are you reaching out and bringing in new members?

What strategies have been effective to attract younger officers?

# Retention Discussion

What makes your chapter unique among other volunteer organizations in your area?

How can we better tell that story?



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