Council and Chapter Leaders:

We are pleased to announce the reopening of the Committee Module and Near Real Time Report in support of our council and chapter leaders. After many months of updating and testing, we are happy to return this important functionality to our volunteer leaders. There is a lot of instruction and information to share, so please read this message in its entirety.

The roll-out plan
The first important piece of information involves our plan to reintroduce CM/NRT to nearly 400 affiliates. In order to ensure a smoother transition, we will be offering access to council and chapters in three distinct phases, evenly balanced with 124 councils and chapters in each phase.

The release of access will proceed as follows:
- Phase 1: Access provided Monday, February 24
- Phase 2: Access provided Friday, March 21
- Phase 3: Access provided Thursday, April 24

We realize that this phasing plan will delay immediate access for those councils and chapters in phases two and three, but we believe a stepped plan to be necessary.

First of all, we anticipate an initial large number of inquiries into our Affiliated Councils and Chapters team seeking assistance in accessing the system and reporting issues or concerns. In order to respond to those requests in a timely manner, we feel it is best to limit our initial interaction to a smaller group of councils and chapters.

Secondly, we believe that this plan will allow us to initiate any required systemic fixes in a manner that will minimize issues for the benefit of subsequent phases.

Lastly, we need to be mindful of the number of user licenses that we have purchased in support of CM/NRT access. Our current plan with Fonteva provides 1,000 licenses a month which allows each designated council or chapter manager multiple daily access to their Committee Module and Near Real Time Report. Whether that manager accesses CM/NRT once or multiple times that day, the license is expended. While there should be no interruption of service on the user end if we exhaust our licensing for a given month, MOAA could incur significant costs. As another hedge against this potential issue, MOAA is exploring the most economical alternative to meet expected demand from our volunteer leaders.

Important to note: We will accelerate the timing of this phase-in plan if trends in member assistance, difficulties encountered, and license consumption rate allow.

How will the roll-out be managed?

Those councils and chapters included in each phase of the roll-out will be notified by separate message, beginning with those involved in Phase 1 on February 24th. Once that message is received, authorized CM/NRT managers will be free to access their module.

A couple of important notes are required. First, the list of authorized CM managers has been updated to the best of our ability, but it is inevitable that our list will need to be updated for some councils and chapters.

We have reset CM access as managers to the historical default of chapter presidents and membership chairs. Council presidents have been granted read-only access to their chapters' membership rosters and NRT reports, if granted by the individual chapters. We intend to continue this access policy while allowing presidents to request access for alternate chapter officers, not to exceed two total CM/NRT managers. As part of our roll-out plan, I am asking council and chapter presidents to validate our list of authorized managers and correct as required. If someone other than your chapter president or membership chair should be one of your two managers, please send that input to chapters@moaa.org.

Important to note: While we will continue our prevailing policy of allowing two managers with CM access per council and chapter, during the initial phased roll-out period, we must ask that only one manager access the CM/NRT. The rationale is that we believe it will be more efficient and effective to have a single council/chapter voice coordinating with us during this critical CM reintroduction period. In addition, limiting access to one individual leader during this period will allow us to manage the heavier license usage described earlier.

Training and Resources
Several resources are available to assist our CM/NRT manager leaders during the CM/NRT reintroduction:
- A dedicated CM/NRT training roundtable will be held Thursday, February 27, 7:00-9:00 pm EST. Join Zoom Meeting
- A CM/NRT User Manual will be made available to leaders as each phase of the roll-out is announced.
- A short form to annotate issues and concerns will also be available to leaders as each phase of the roll-out is announced. Please do not populate this form with personally identifiable member information (PII). Member-specific updates should be passed telephonically to our Member Service Center at 800.234.MOAA
- Our chapters@moaa.org inbox is available for other requests
- Telephone or virtual technical support, as requested and coordinated

Setting expectations for the roll-out:
As you can imagine, even with our phased roll-out plan, our staff will be challenged to quickly respond to the needs and concerns of council and chapter leaders as access is restored to the CM/NRT. Additionally, please be aware that we continue our required efforts, at the national level, to clean up and update our member database. Inevitably, there will be some data issues that will manifest in your member roster and NRT reports and may need to be corrected. We will work with you to minimize these issues as we continue to update and bring the required discipline to our national database.

Lastly, a most sincere thank you to all for your patience during this long transition of our Association Management System. We are confident that, with some time for break-in and

familiarization, you will find our new Committee Module and Near Real Time Report functionality a valuable tool in chapter management, recruitment, and retention.

Sincerely,

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