

# 2019 STAKEHOLDER'S REPORT







*‘Thank you for all you do to keep MOAA strong, and please continue to spread the word. Members are our strongest ambassadors, and we’re going to need all hands on deck to ensure our nation maintains a strong national defense.’*

We started the year fighting for our uniformed servicemembers’ pay and benefits ensnared in a government shutdown and ended it celebrating legislative victories embedded in the fiscal year 2020 National Defense Authorization Act. This includes the hard-fought elimination of the Survivor Benefit Plan/Dependency and Indemnity Compensation offset known as the widows tax.

Finally, we have a fix for the broken contract with our servicemembers — an egregious penalty for those who wished to provide for their families. This was the year, after decades of effort, thanks to the coming together of a powerful coalition made of brave and unrelenting surviving spouses, MOAA members, media and other service organizations.

This is a great way to end a banner year for MOAA.

In addition, this year we accomplished significant milestones: moving into a fully renovated headquarters building, strengthening an already talented leadership team, launching a new website, and experimenting with a new TV advertising campaign. These moves — combined with a dedicated and engaged board of directors — are having significant impact on our association and setting us up for a great future.

We’re hearing very positive feedback from our members and volunteer leaders in the field on core services we provide, including this recent unsolicited feedback, “The MOAA Newsletter and the monthly magazine are the most useful information coming into my house each week.”

This is typical of the feedback our vice presidents, directors, and board members receive during visits to our 34 state councils and our nearly 400 local chapters.

Another highlight of 2019 was the cruise to Normandy and the amazing number of people who wanted to cruise together in the camaraderie of membership, creating such demand we had to add a second boat. Together we stood in awe of the bravery and heroism of the Greatest Generation. This was just one of the many inspiring experiences throughout the year.

This 2019 edition of our annual Stakeholder’s Report details the achievements and explains how your commitment to MOAA helps make a difference to servicemembers, veterans, and their families, especially needed at a time when we remain at war and see threats to America and its ideals around the world.

You will learn how MOAA made significant progress across our strategic focus areas. In addition to passage of the NDAA, we fought off decrements to TRICARE benefits and raised awareness for spouse employment issues and safety in military housing.

Our membership trends are stable, and we are seeing success in new campaigns for membership.

Your association is on solid ground heading into the future with a strong investment portfolio. We bucked national trends in our revenue from dues, advertising and partnerships. The decision to convert our 55-year-old headquarters into a modern facility helps keep the promise of being here to serve membership for decades to come.

This election year leaves some angst about the new faces we’ll see coming into Congress and the current legislators taking time away to campaign. This leads to uncertainty in efforts on Capitol Hill. Against any headwinds, I stand confident our strong headquarters team, along with our councils, chapters and volunteer leaders in the field, will persevere as they did in 2019.

Through member advocacy at home and involvement in Storming the Hill, your dedication has touched the lives of those who serve our country.

It is an honor to never stop serving. I wish you and your loved ones a prosperous year.

*Dana T. Atkins*



**MOAA members** gathered in Washington, D.C., for Storming the Hill in April 2019.

**M**OAA continues to make progress toward the ambitious strategic goals set forth in the updated 2017-21 Strategic Plan, approved by the board of directors. During the past year, the staff implemented supporting operational plans to focus our collective efforts to accomplish goals in the following areas:

**ADVOCACY**

The 2020 NDAA signed on Dec. 20 is landmark legislation. It culminates the many efforts ranging from grassroots visits at home to coordinated campaigns on Capitol Hill over a period ranging from months to decades.

MOAA's Storming the Hill in April, and the Summer Storm in August, were instrumental in increasing awareness and support for the military pay raise, repeal of the widows tax, and protecting TRICARE and military medicine. The NDAA included MOAA's objectives in all three of these advocacy priorities.

These engagements and achievements led to MOAA being recognized for the 13th year in a row as a top lobbyist by The Hill, a news outlet based in Washington, D.C.

The beginning of 2019 started on a somber note for many. A government shutdown that started in December 2018 continued into January, leaving many without paychecks. MOAA and its members already had helped secure appropriations for the Army, Navy, Air Force, and Marines, so we turned our focus to achieving the same for our other uniformed services. Lobbying efforts with Congress focused on legislation to fund the departments responsible for the U.S. Coast Guard, U.S. Public Health Service, and the National Oceanic and Atmospheric Administration.

All told, from late December through January, MOAA kept the government shutdown in the forefront of



**Cmdr. Rene Campos, USN (Ret)**, MOAA's senior director of Government Relations, speaks at a Veterans Affairs hearing March 12, 2019, on Capitol Hill.



**Surviving spouses** Kristy DiDomenico, Edie Smith, and Capt. Kathy Thorp, USN (Ret), attend a press event supporting repeal of the widows tax.

members' minds. In a short timeframe, they produced six articles, two Calls to Action, a President's Message and a nonpartisan and poignant message from Lt. Gen. (Ret) Dana Atkins, whose video reached more than 14,000 people on Facebook and was viewed more than 7,000 times on Facebook and YouTube. Articles generated more than 15,000 page views and "End the Shutdown" calls to action generated more than 10,000 letters.

MOAA's main annual lobbying campaign was Storming the Hill in April with more than 150 MOAA members from around the country. The added support and inclusion of journalist Annie Yu and her team from WUSA9 was a novel approach. It was impactful, merging grass-

## How MOAA directly and effectively influenced the outcome of the FY 2020 NDAA:

### Repealed the widows tax

as part of the FY 2020 NDAA

### Slowed DoD's plan

to eliminate 18,000 military medical billets.

### Improved accountability

for the quality and safety of military housing.

Assured a

### 3.1% pay raise

for uniformed services, and protected housing allowances from arbitrary cuts.

Ensured:

- **No new projected health care fees.**
- **COLA for retirees remains intact.**

## Championed congressional oversight

of the planned commissary-exchange merger.

roots advocacy with a Washington, D.C. lens to expand the reach beyond Capitol Hill. Storming and follow-on contacts led to unprecedented levels of support to repeal the Widows Tax, the iniquitous offset that cost nearly \$12,000 per year for 67,000 surviving spouses of servicemembers killed in service or through service-caused illness.

Following these spring efforts, MOAA initiated a Summer Storm campaign designed to get our members across the country to engage with their legislators during the summer working period. In concert with all of these efforts, digital campaigns on social media helped get our message to prominent members of Congress and national media. All of these efforts combined to fuel the fire that was simply too big to ignore.

In the end, legislation introduced by Rep. Joe Wilson and Sen. Doug Jones earned a spot in the NDAA where it easily passed in conference. Following the same result on the floors of the House and Senate, the bill was sent to the White House where the President signed it into law on Dec. 20, 2019. Thus, the widows tax was repealed. Now a matter of law, this repeal will be phased in over a three-year period starting in 2021.

MOAA's value to its membership and the entirety of all the uniformed services, their families and survivors, is represented in these other efforts:

- **Engagement and advocacy for veterans remained a top priority for MOAA** as evidenced by their unrelenting support to pass the Blue Water Navy Vietnam Veter-

ans Act of 2019, signaling the end of years of work by veterans and advocates. This law includes, for benefits and health care purposes, those who were also exposed to Agent Orange at sea further from the mainland.

- **When foreign-born servicemembers were faced with deportation of family members**, MOAA jumped at the chance to be their voice. Sen. Tammy Duckworth's bill, the Military Family Parole in Place Act, was set in motion to amend the Immigration and Nationality Act to require the Department of Homeland Security secretary to grant parole to parents, children, spouses or widowers of servicemembers and veterans who were not dishonorably discharged.
- **To better understand issues facing families of our Guard and Reserve forces**, MOAA initiated and co-led a National Guard and Reserve Family Forum attended by senior military leaders, spouses, and subject matter experts. Highlighted problems include children's education and wellbeing, community support, transition support, and health care and servicemember wellbeing. The information gathered at the event has already shaped the advocacy agenda for the remaining term of the 116th Congress.

As military spouses face unemployment or underemployment at nearly 10 times the national average, they continue to seek help on Capitol Hill, and MOAA has

*As military spouses face unemployment or underemployment at nearly 10 times the national average, they continue to seek help on Capitol Hill, and MOAA has always answered the call.*



**Desiray Tuinstra**, an outgoing member of the spouse council, talks with advisory council members at a November event to thank them for their efforts and to welcome the newest members.

always answered the call. Whether meeting members of Congress or their staffs, or presenting with Hiring Our Heroes through its Military Spouse Employment Advisory Council, MOAA has effectively helped keep this issue on the front burner to align with other efforts like Rep. Antonio Delgado's Military Spouse Hiring Act.

MOAA also directly and effectively influenced the outcome of these issues:

- **Assured a 3.1 percent pay raise** for our uniformed services, and protected housing allowances from arbitrary cuts.
- **Significantly improved accountability requirements** for the quality and safety of military family housing provided by Public-Private Partnerships.
- **Inserted a provision slowing DoD's plan to eliminate 18,000 military medical billets**, calling for an assessment on military medical readiness and support to beneficiaries.
- **Ensured no new projected healthcare fees** for currently serving and retirees.
- **Ensured COLA for retirees** and other beneficiaries remained intact.
- **Championed congressional oversight to delay the planned commissary-exchange merger** to ensure an objective assessment of the fiscal estimates and negative impacts on beneficiaries.

As in previous years, MOAA continues to connect with DoD officials at the highest levels — including the secretary of defense and deputy secretary. We participate in periodic roundtables with service secretaries

and chiefs. This year, we hosted the director of the Defense Health Agency regarding concerns about military treatment facilities, TRICARE, and erosion of benefits and rising fees. MOAA's Government Relations team submitted testimony to Congress on the aforementioned issues and stayed close with key staff leaders on the House and Senate Armed Services Committees and their subcommittees.

## MEMBERSHIP AND MARKETING

Strengthening membership remains a top priority for the organization, and we remain grateful for the commitment of our council and chapter leaders as we work relentlessly toward this goal. In 2019, we relied heavily on our "tried and true" campaigns to grow membership, but we also introduced several pilot programs to expand brand awareness and attract younger officers. We're pleased with our achievements in 2019 and look forward to greater expansion in the coming year.

### Among MOAA's 2019 accomplishments, we:

- **Recognized an increase in overall membership of 3.75%**. In addition, we successfully maintained renewal rates of premium members, increased the numbers of basic members upgrading to premium and initiated a number of new and successful campaigns. Despite these positive outcomes, stabilizing paid membership levels remains one of MOAA's greatest challenges for 2020.
- **Debuted a new television commercial during the Army-Navy game** in an effort to grow brand awareness of MOAA in the military community. As a result, we drove 50% more traffic to our website moaa.org on game day, and we increased the number of joins attributed to our ad campaign that week by 150%.
- **Entered a limited partnership with the Washington Redskins**, which provided numerous opportunities to engage current and prospective members in fun and relevant ways. MOAA's presence at three home games, member involvement in volunteer activities, and an Officer of the Month campaign allowed MOAA to further increase name recognition in the military community and effectively build our prospect database.
- **Launched a series of highly successful email campaigns**,



**Lt. Col. Aric Raus, USA,** of MOAA's Currently Serving Advisory Council, was in a commercial that aired nationally during the Army-Navy game.

which were inspired by the retail industry. Prospective and basic members received time-sensitive, discounted membership offers aligning with holidays, such as July 4, Labor Day, Black Friday, and New Year's. With countdown clocks and special incentives, these offers resulted in nearly 2,000 premium members and 200 life members in 2019.

- **Expanded our "Fighting Words" campaign, which effectively highlights the real threats to military benefits.** This digital campaign continues to be a key driver of paid membership and provides greater insight into

the issues our members care about. In 2020, we will look to offer greater

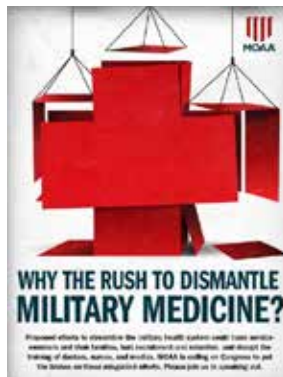
personalization to ensure our messaging resonates with current and prospective members. The newly redesigned website will play a key role in allowing us to achieve this objective.

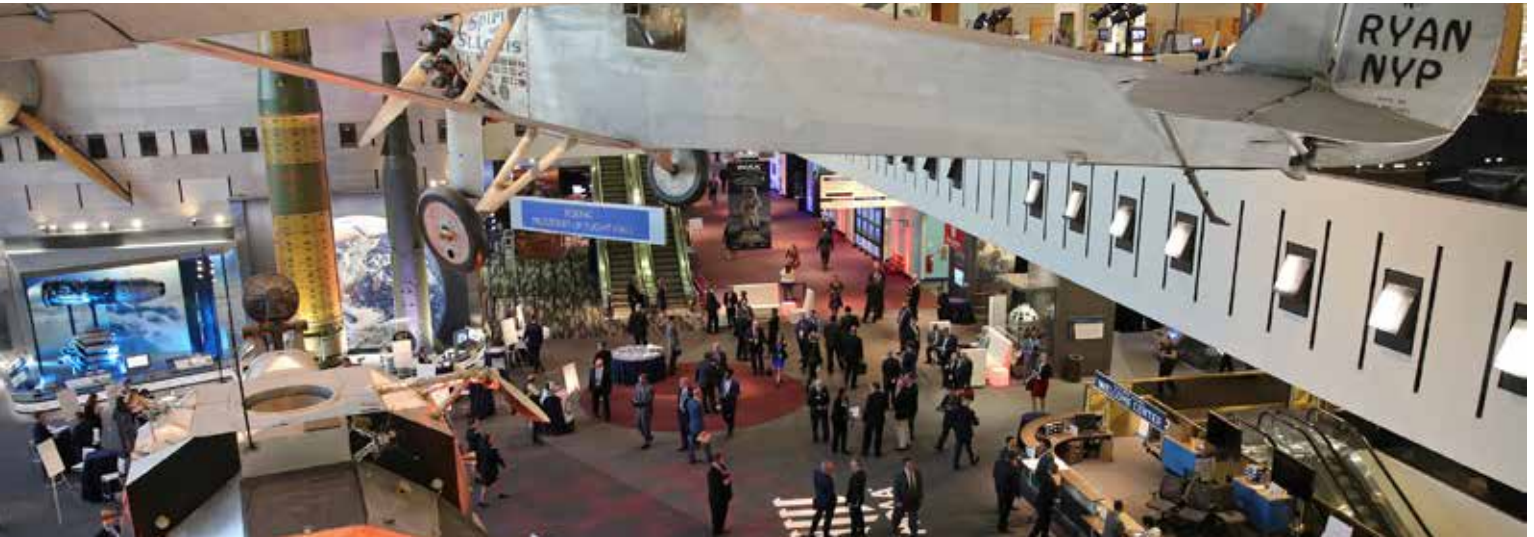
- **Exceeded membership goals for our outreach program by 14%.** This critical program allows MOAA staff and ambassadors to speak with current and prospective members face-to-face, address their challenges and concerns, and encourage membership. As a result of this program, MOAA gained nearly 4,100 new members in 2019.

**ENGAGEMENT**

As outlined in MOAA's updated Strategic Plan, the engagement umbrella includes four areas of focus: MOAA's Transition Center and Member Service Center, development of member products and services, the MOAA Foundation and Scholarship Fund, and communications and audience growth.

In 2020, MOAA will build on its messaging campaigns to reach out to current and prospective members.





MOAA hosted their 5th annual networking forum and hiring event in Washington, D.C., above, on Sept. 19, 2019.

The Member Service Center team, right, shares in-depth knowledge of military and veterans' benefits with MOAA members.



**1. Transition Center and Member Service Center**

MOAA's Transition Center continued its rhythm of monthly webinars in 2019, with topics ranging from career building to personal finance to health care. The most popular topics were:

- Highlights of MOAA's health and life insurance plans
- Tricare for Life and Medicare transition at age 65
- Preparing your survivors (for a member's passing)
- And a year-end review of important changes to veterans' benefits.

In total, more than 12,300 members and prospective members registered for these monthly events, an increase of 31% from 2018.

In addition, our career management and benefits education teams conducted 125 installation visits to discuss self-marketing best practices in preparation for career transition, as well as finance and benefits education for the military community. Moreover, MOAA's legislative and finance experts were the speakers of choice at 23 retired activity events nationwide. They connected with nearly 6,000 members of the military community in this important outreach and branding program.

Finally, MOAA's Transition Center is in its second year of a multi-year contract to deliver the career transition, finance, ethics, and veterans' benefits facilitations to the Army's general officer transition program. This work led to MOAA's selection to deliver the career transition content for the Navy/Marine Corps flag and general officer transition program. Both of these programs are important new sources of revenue for the association.

Recognizing that career transitions are challenging, even in a strong economy, the association hosted our fifth annual networking and hiring event at the Smithsonian National Air and Space Museum. This unique event is distinctly different from other veteran-focused career development experiences; and this year's production connected nearly 500 servicemembers, veterans, military spouses, and surviving spouses with hiring

**More than 12,300**  
members and prospective members registered for monthly webinar events, **an increase of 31%.**





managers and corporate executives representing 95 veteran-friendly companies.

MOAA's commitment to providing impeccable member service also includes a call center staffed by military and veteran benefit experts who manage nearly 1,000 engagements each week via phone call, e-mail, and text chat, with most inquiries answered in less than 24 hours.

## 2. Products and Services

The successful extension of our formal partnerships with USAA and Mercer Consumer for the next several years will allow MOAA to continue to offer high-quality, well-vetted products and services to its members.

We also remain committed to creating new experiences and opportunities for camaraderie. We offered several signature trips with our travel partner, MOAA Vacations, including a Paris to Normandy sailing, which sold out so quickly we commissioned a second trip. By all accounts, members had high praise for MOAA Vacations, and they enjoyed the opportunity to share their experiences with fellow MOAA members. More signature cruises and trips are coming in 2020.

## 3. The MOAA Foundation and the MOAA Scholarship Fund

In 2019, the MOAA Development team continued its important work supporting military and veteran families through highly impactful programs at both the national

and community levels. The MOAA Scholarship Fund and the MOAA Foundation integrated their outreach, fundraising, and communications strategies to achieve message and brand synergy. The combined annual report, published in the May edition of *Military Officer* magazine, reflects the many positive impacts these philanthropic organizations are having on the military community.

### THE MOAA FOUNDATION

Among 2019 successes, the MOAA Foundation provided \$90,000 in financial support to MOAA's Military and Veteran Networking Forum. Ninety-five companies and 900 candidates registered for this event — our most successful forum yet.

Since 2016, the foundation has received three major grants from the Democracy Fund, a bipartisan foundation committed to citizen participation in our democracy. Projects supported by these grants directly supplement MOAA's advocacy mission and enable MOAA to engage active-duty families, a key demographic, in a way not replicated by any other military service organization. In 2019, the MOAA Foundation completed a two-year, \$300,000 grant to conduct voter outreach campaigns.

The MOAA Foundation-funded Military Spouse Professional Development program continued to thrive in 2019 as one of the premier programs of its kind in the nation. MOAA was able to support five "Keeping a Career

**The 2019 Jeff Peck Memorial/Scholarship Golf Classic**, left, raised money for MOAA's Scholarship Fund.

**MOAA members**, above, visited Normandy during a cruise in June 2019.

on the Move” seminars in collaboration with the U.S. Chamber of Commerce Hiring Our Heroes program.

Finally, the foundation’s Community Outreach grant program expanded again to award 22 grants totaling \$79,000 to support important community work on behalf of the nation’s military and veteran families.

**THE MOAA SCHOLARSHIP FUND**

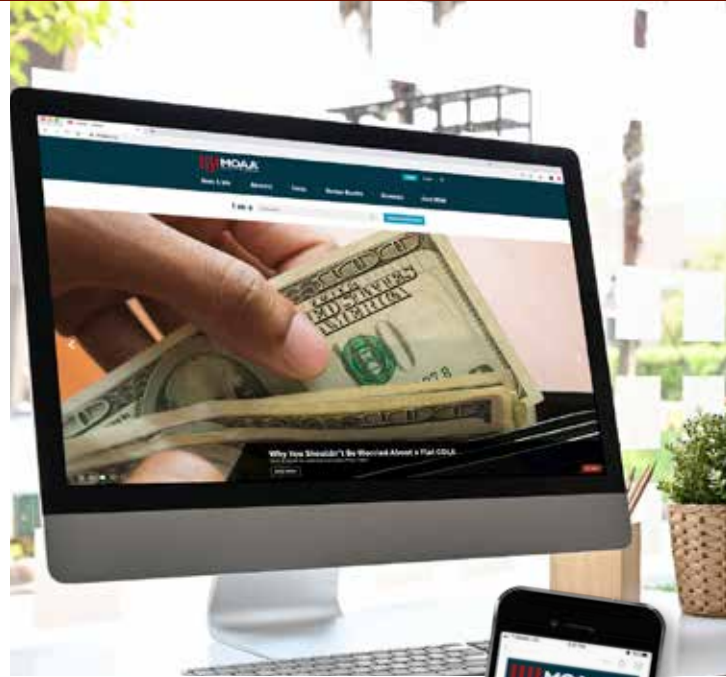
Since its inception in 1948, the MOAA Scholarship Fund has provided more than 15,000 children of military and veteran families with more than \$150 million in grants and no-interest loans, while offering a gratifying legacy to MOAA members who support its work through donations and bequests. In 2019, this GuideStar platinum-rated charity distributed just over \$8 million to more than 1,300 military and veteran family children.

Behind the scenes, a complete overhaul of the internal application and disbursement processes has improved the experience for students and parents. Progress from 2019 will enable students to upload required documentation during the 2020 application process, securing sensitive information that was previously faxed or mailed. We also continue work with the IT and Finance departments to improve both the online donation and loan repayment processes.

On the revenue side, the MOAA Scholarship Fund worked hard to reduce costs of direct mail campaigns to maximize returns. As an example, a Back-to-School campaign cost \$6,750 but raised more than \$65,000. The Giving Tuesday drive in early December surpassed our 2018 results. Furthermore, on-time loan repayments now exceed 98 percent — much higher than the 65 percent national average cited by the Department of Education — and a direct result of the great work of the Educational Assistance team. Overall, despite concerns with recent tax law changes, the MOAA Scholarship Fund continues to thrive and have a positive impact on many military families.

**4. Communications and Audience Growth**

Our Communications Team — ably supported by our content generators and subject matter experts throughout MOAA — is engaging more members and more prospects through more channels than ever before in the 91-year



MOAA’s website, MOAA.org, was redesigned in 2019 to better serve current members and to attract new members.

history of our association.

Most recently, we’ve rolled out a redesigned MOAA.org website to better convey the message and benefits of the association and to deliver critical news and information.

This new vehicle comes with a powerful engine under the hood — a data-driven content management system helping us to identify and attract new members — and with the added capability to better serve current members.

Information on the site is optimized for members who access it on a mobile device — the channel of choice for younger members and a foundation as we continue our evolution in the digital age.

In the past year, we have seen the amount of online content expanded with approximately 12 new articles per week, helping fuel a robust flow of information important to our advocacy and for members making decisions for their transition to civilian careers or planning for retirement.

The team’s recent efforts mean members are seeing more video, editorial cartoons and member columns, such as op-eds from board member Rear Adm. Tom Jurkowsky, USN (Ret). His work, on topics such as the widows tax and medical billet reductions, has ap-

Photos: Getty Images

### Air Force Col. Nick Hague: The MOAA Interview



More members are opening and interacting with *The MOAA Newsletter*.

**30%**

of newsletter recipients open it every week—an important statistic, and **several percentage points above industry averages** for association newsletters.

**55%**

of all magazine readers look at the newsletter.

### Understanding the Threat to Military Medicine



The growing audience for our online products is seeing more videos, editorial cartoons, and member columns.

### Why Should You Join MOAA?



peared in multiple national media outlets.

Member engagement with content is growing. The number of page views has increased to 5 million per year and we see users spending more time on the site. Also, more members are opening and interacting with *The MOAA Newsletter*. Now 55% of all magazine readers look at the newsletter, up from 33% two years ago. This is tracked in metrics from our analytical tools and from surveys of readership.

About 30 percent of newsletter recipients open it every week— an important statistic, and several percentage points above industry averages for association newsletters.

Newly redesigned, it is now nationally recognized as one of the best newsletters according to Folio, the top organization reviewing non-profit magazine publishing.

Members tell us one of the benefits they value most is the credible news and information they receive from MOAA— and we upped our game in multimedia this year. Videos produced by MOAA have more than a quarter million views from our audiences, and that's just on social media posts.

Social media engagement also is growing. MOAA's reach through Facebook is comparable to or exceeding engagement among the big six veterans service organizations. A recent post during the holidays reached more



MOAA's flagship publication, *Military Officer* magazine, is innovating, improving, and growing its readership.

than a million people and was shared more than 9,000 times with 60,000+ interactions.

The year ended with the successful publication of our first podcast series, geared toward officers transitioning to a civilian career.

We seek to engage the next generation of MOAA members through these new platforms of communication.

This progress is added to the overwhelming, award-winning success of *Military Officer* magazine — which is still innovating and improving with each issue. In 2019, it was recognized with a record number of national content and design awards. More rewarding though, is the growing readership and attention our flagship publication is receiving.

Your *Military Officer* magazine continues to produce valuable and intriguing content you simply will not find anywhere else. From in-depth interviews like our sit-down with officer-turned NFL pro Alejandro Villanueva, to important guides, expanded coverage of chapter activities, and revealing reports on how your healthcare and benefits could be at risk. You see the diversity of service to country through stories on ALL the uniformed services reflected in this publication. It's a best-in-class publication for content and design among non-profit associations.

Overall, we are bringing together resources to produce storytelling and information important to membership in new ways on all of MOAA's publishing platforms.

We endeavor to make both the print and digital experiences leading reasons for members to renew and engage with MOAA.

### COUNCIL AND CHAPTER AFFAIRS

MOAA's 34 state councils and nearly 400 local chapters, along with their 43,000 members, continued to make major contributions in support of the association's legislative advocacy success, membership growth, and local community engagement throughout 2019.

Most notable was the council and chapter system's commitment in support of the repeal of the decades-old Survivor Benefit Plan and Dependency and Indemnity Compensation offset or widows tax. Our council and chapter members were center stage throughout this fight — especially during the Summer Storm campaign last August, where many of our council and chapter volunteer leaders and scores of their dedicated members, including many surviving spouses, visited with members of Congress in their home offices to highlight the injustice of the widows tax.

One illustration of the impact of our council and chapter members in this major legislative success was highlighted to MOAA headquarters in the following text from a MOAA member who is also a surviving spouse:

"I just want to express my thanks to MOAA for your continuing efforts to lobby for repeal of the widows tax. With MOAA's encouragement, I had the confidence to meet with [my senator's] staff to express my concerns." "You are doing a great job representing us!"

This is grassroots advocacy in action — and this is what our nationwide network of councils and chapters do every day.

Also, in 2019, MOAA councils and chapters played key roles in securing major legislative victories in their home states. Recent state-level successes include the Arkansas Council championing a state tax exemption for military retired pay and survivor benefit plan payments, our Maryland Council helping to secure a \$15,000 state tax exemption for military community members over 55 years of age, and our Indiana Council leadership helping to win a phased exemption for military retirement pay.



**Paul Revere (Mass.) Chapter** President Col. Paul J. Cancelliere, USA (Ret), right, and Capt. Jim Carman, USN (Ret), left, MOAA Council/Chapter vice president, present a scholarship to Hallie Frances Canfield, second from right.

In support of the association's state-level advocacy work, several of our state council leaders are spearheading a state-level legislative consortium to share best practices for state advocacy success across our association via periodic conference calls, and the association has assigned a program director for transition and engagement to provide limited headquarters support for our members' state advocacy efforts.

Our nationwide network of councils and chapters also donated nearly \$500,000 to local college scholarship funds, mostly to rising ROTC students, and 22 MOAA councils and chapters received Community Outreach Grants totaling \$79,000 from the MOAA Foundation. The chapter community service programs supported by these grants build the MOAA brand while making a difference close to home for veterans and their families. The total number of chapter grant awards has increased by nearly 200 percent since 2017, and we hope to expand the number of participating chapters in 2020.

MOAA's virtual chapter program also expanded in 2019, with continued growth of the Surviving Spouses Virtual Chapter, now boasting 126 members, and the MOAA Uniformed Services Nurse Advocates with 247 members.

Increasing support to our local councils and chapters in the areas of chapter management, recruiting, communications, leadership succession, and information tech-

## Notable numbers from Council and Chapter Affairs

**\$500,000** The amount our nationwide network of councils and chapters donated to local college scholarship funds.

**\$79,000** The total amount of Community Outreach Grants that 22 MOAA councils and chapters received from the MOAA Foundation.

**200%** The percentage increase of the total number of chapter grant awards since 2017.

nology continues to be a high priority of the association. In 2019, we offered training to nearly 400 council and chapter volunteer leaders at quarterly chapter leaders' workshops, and we saw increasing numbers of councils and chapters participating in chapter management enhancements and financial support programs provided by our affinity partners.

Finally, MOAA recognized 158 state councils and local chapters in 2019 with four- and five-star awards for excellence in chapter management, recruiting, advocacy support, communications effectiveness, and community impact. Additionally, 163 councils and chapters were recognized for exceptional communications programs, designed to keep members informed and engaged at the local and national level.

### FINANCE AND ORGANIZATION

MOAA's financial and organizational posture is improved with income generation exceeding projections, the successful renovation of the national office, and close management of expenses in 2019.

Our investment portfolio of approximately \$132 million is steadily growing from our balance of \$118 million at the end of 2018. Our portfolio returned 17.98% compared to the projected re-



*"With MOAA's encouragement, I had the confidence to meet with [my senator's] staff to express my concerns. You are doing a great job representing us!"*

— MOAA member and surviving spouse



MOAA renovated its headquarters building, above, in 2019 to provide its team members with a modern and collaborative work environment.



**Kathy Partain**, MOAA vice president of Membership and Marketing, is shown with the MOAA shield at the newly refurbished building.

turn of 6.0% on an annualized basis. MOAA's portfolio has generated a net increase in value of approximately \$15.5 million year to date.

Dues revenue is stable thanks to strong retention numbers of existing membership and an incremental dues increase taking effect. Advertising revenue hit a four-year high, a reverse in previous declines. This results from the addition of new advertising opportunities through a special section in the June issue of *Military Officer* magazine and the addition of digital advertising to the website and e-newsletter.

Cementing the organization's ability to thrive and have an impact on Capitol Hill for years to come is the completion of a major renovation of our 55-year-old headquarters building in Old Town, Alexandria, Virginia. The revamped headquarters offers MOAA team members an efficient, collaborative, and modern work environment.

This renewed facility hosts our most valuable asset, our headquarters team. Our team combines a valuable mixture of seasoned employees with deep institutional knowledge and well-forged relationships, and the fresh perspective of new employees hired with critical competencies for a digital future. This blend enables us to accelerate our member engagement and advocacy effectiveness and provide the most value to our membership. Our strong MOAA team allows us to improve our products and test new approaches in the most effective ways possible. During the transition and life in temporary quarters, they didn't miss a beat.

MOAA President and CEO Lt. Gen. Dana T. Atkins, USAF (Ret), explains that investing in capital improvements is vital. "Combining the improvements made in our IT architecture, social media presence, content management, talent acquisition and retention, membership benefits and acquisition strategies, website redesign, council and chapter support, cloud migration,

and internal processes, we are securing the future of the association.”

The entire MOAA staff relocated to the renovated offices in the fall, finding an improved and efficient HVAC system, new fire suppression operations and revamped IT infrastructure.

The Finance team diligently manages and monitors the association's resources, conducting successful operations within budget guidelines and through successful audits by an outside firm. The CFO and our group vice presidents collaborate to identify new efficiencies and revenue-generating resources for future years. These collective efforts will enable MOAA to maintain its sound financial position for years to come.

We also have invested in several new systems to enhance membership management and acquisition above and beyond the new website. This includes conversion to a new software package to manage all individual member accounts and activities.

As you can see throughout this stakeholder's report, leveraging technology remains a top priority led by our CIO team in collaboration with all departments. We also have enhanced security for our physical assets and maintain cyber security protocols to include ongoing training programs, annual auditing, and compliance with required industry standards.

We continue to incorporate a mix of external and internal talent to fill staff vacancies. As in previous years, our Member Service Center offers a stepping stone through professional development for positions within MOAA; we maximize this to the fullest and are stronger as an organization as a whole for it. Four member service representatives (MSRs) were promoted within the association in 2019, and three staff members who started at MOAA as MSRs received an additional promotion. An intern was also promoted into a permanent position. Additionally, we retain seasoned professionals with 19 employees having 10 or more years of service on staff.

Job descriptions and operations were adjusted in several areas to streamline production and emphasize digital- and data-centric responsibilities. Overall, our organizational capacity continues to adapt to further advance the digital posture of the organization.



MOAA's Chairman of the Board Adm. Walter F. Doran, USN (Ret), left, and President and CEO Lt. Gen. Dana T. Atkins, USAF (Ret), cut the ribbon at the Nov. 5, 2019, ceremony at the renovated headquarters.

## IN CLOSING

It is our mission and honor to advocate for and to support all the members of the military community, all those serving in the uniformed services and the veterans, their families, and surviving spouses. We do this work for all of America's servicemembers.

This report is meant to give you fidelity into the progress, priorities, and plans initiated in partnership with our board of directors, volunteer leaders in the field, and headquarters team as we tackle many projects and obstacles, and achieve major legislative victories. In 2020, we will leverage our position to open more doors, continue to protect the earned benefits of servicemembers and advocate for a strong national defense. The values of service, leadership, and professionalism will be lifted up with your continued support as we all “never stop serving” together.

MOAA remains the essential advocate to preserve pay and benefits for the military and veteran community, and our recent investments in people and platforms ensure we will remain relevant for another 90 years. It's our honor to do this work for all the services and live the mantra Never Stop Serving.

Our board of directors and headquarters team join in wishing you a safe and prosperous year.

*MOAA President and CEO Lt. Gen. (Ret) Dana T. Atkins says investing in capital improvements is vital. “We are securing the future of the association.”*

