



LEADERS WORKBOOK

Virtual Workshop Midwest Region

Aug. 27, 2021



MOAA's vision:

To be the leading association advocating on behalf of the military community.

MOAA's mission:

To advocate on behalf of the military community and never stop serving.



MOAA Council
& Chapter Affairs
Leaders Workbook
Virtual Workshop
Midwest Region

Introduction

This workbook was created to share information, resource tools, and best practices to enable council and chapter leaders to grow and sustain strong chapters. The workbook is not an all-inclusive guide to chapter management but instead is intended to serve as a resource guide on those critical challenges facing MOAA's affiliate network. For more detailed resources, refer to the *Council and Chapter Policies and Procedures Guide*, which you can find on www.moaa.org.

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APPENDIX III: COMMITTEE MODULE TRAINING

APPENDIX IV: LEGAL, TAX, COMMUNITY GRANT INFORMATION

APPENDIX V: DIRECTORY

VIRTUAL WORKSHOP AGENDA

Friday, Aug. 27, 2021

| | |
|------------|--|
| 9:45 a.m. | Virtual Platform Tour/familiarization |
| 10 a.m. | Admin Remarks |
| 10:05 a.m. | Invocation |
| 10:10 a.m. | Pledge of Allegiance and Introduction of Lt. Gen. Atkins |
| 10:15 a.m. | Welcoming Remarks |
| 10:45 a.m. | MOAA Panel Discussion |
| 12:45 p.m. | Lunch Break |
| 1:30 p.m. | Breakout Sessions: <ul style="list-style-type: none"> • Recruiting and Retention (Presidents, Membership Chairs) • Legislative Training (Legislative Chairs/Liaisons) • Surviving Spouse Liaison Training (Surviving Spouse Liaisons) |
| 3 p.m. | Break |
| 3:30 p.m. | Break-Out Debrief |
| 4:30 p.m. | Guest Speaker |
| 5:30 p.m. | Closing Remarks |



William F. Streitberger

Executive Director, Chicago Regional Office Veterans Benefits Administration

William F. Streitberger was appointed Executive Director of the Chicago Regional Office (RO) in August 2020. As Executive Director, Mr. Streitberger is responsible for administering over \$159,000,000 a month in Compensation and Pension benefits to over 107,000 Veterans and their dependents in the 102 counties of the State of Illinois. He supports over 1,300 participants in the Veteran Readiness and Employment Program, assisting them in overcoming barriers to employment and securing independence in their daily living. In addition, the Chicago RO is responsible for determining eligibility for certain benefits and services provided by Insurance, Veteran Readiness and Employment, Loan Guaranty, the Veterans Health Administration and the National Cemetery Administration.

Mr. Streitberger was appointed Executive Director of Veteran Readiness and Employment Service in September of 2018. As Executive Director, Mr. Streitberger was responsible for overseeing the delivery of VR&E services to Veterans with service-connected disabilities and transitioning Servicemembers to prepare for, find, and maintain suitable careers, or obtain independence in daily living. He led operations employing approximately 1,600 employees located at over 350 locations including 56 Regional Offices, the National Capital Region Benefits Office, approximately 142 out-based offices, 71 Integrated Disability Evaluation Systems (IDES) installations, and 105 VetSuccess on Campus (VSOC) sites.

MOAA OVERVIEW

Chapter Leaders' Workshop 2021



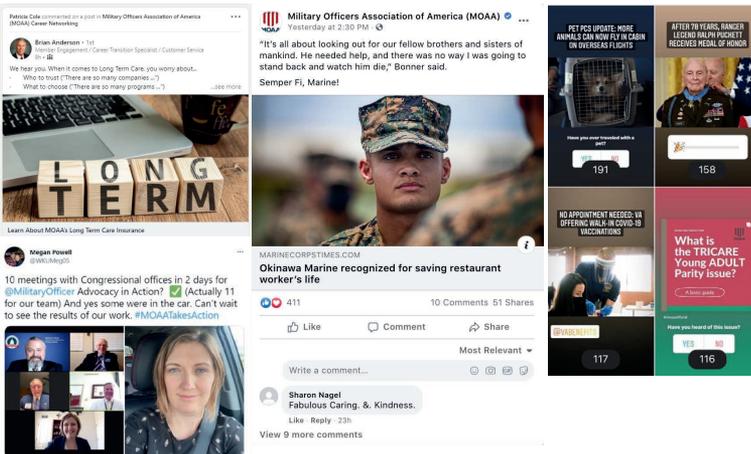
Six Strategic Priorities



Engagement: Keeping Members Informed



Engagement: MOAA Social Media



Engagement: Publication Updates

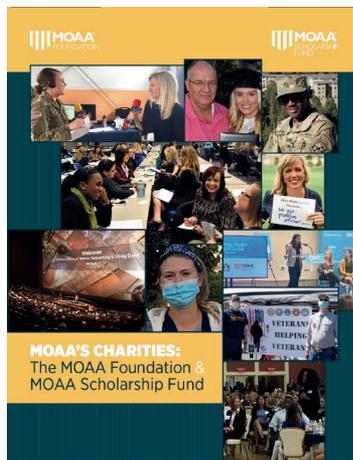


- Aging Into Medicare
- Estate Planning
- Benefits Planning Guide
- Guard-Reserve Retirement Checklist
- Remarriage Guide
- Help Your Survivors Now
- Survivor's Checklist
- Concurrent Receipt Update
- Marketing Yourself
- Military Spouse Career Guide
- And More >> www.moaa.org/publications



- Major donations from Humana and Delta Dental
- More than \$290,000 in individual donations
- 28 career building events with 6,800 registrants in 2020

The MOAA Charities



- Professional Education Outreach
- Career Transition
- Spouse Professional Development
- Community Outreach
- Education Assistance
- Emergency Relief

The MOAA Foundation: Community Outreach Chapter Grants

Showing Steady Growth

| | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------------|----------|----------|----------|----------|----------|
| Applications | 9 | 29 | 44 | 48 | 36 |
| Grants Awarded | 6 | 19 | 22 | 23 | 33 |
| Total Disbursed | \$25,000 | \$75,000 | \$79,400 | \$84,832 | \$87,400 |

MOAA Scholarship Fund



- \$8.5 million in loans and grants distributed
- Increased annual loan/grant amount to \$8,000.
- Applications: Nov. 1 to March 1
- www.moaa.org/education



State Legislative Consortium

Col Tom Robillard, USAF (Ret)

Trobillard@sc.rr.com

VP SC State Council

Legislative Affairs

Mobile: (803) 730-6109

LTC Don Wolfinger, USA (Ret)

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Greater St. Louis Chapter/MO Council

Legislative Affairs

Mobile: (636) 484-0248

- Facilitate the exchange of information across councils.
- Work with staffers/legislators at **local level** for state/federal issues.
- Sharing of programs, issues, and processes at the state level.
- Use virtual communications (conference calls, Skype, Facetime, MOAA Regional Training program) to share information.
- Does not replace council/chapter legislative affairs activities.
- MOAA Legislative Team provides guidance and assists as needed.

October 2021 Annual Meeting and LOE Presentation



Board Selection Update



Class of 2026

- 1 warrant officer
- 1 NOAA officer
- 2 surviving spouses
- 4 council/chapter leaders

Diversity Awareness Initiatives:

- Leadership meetings and outreach to minority mentoring organizations
- Encouraging member self-reporting of demographic data
- Promoting board service through multiple channels

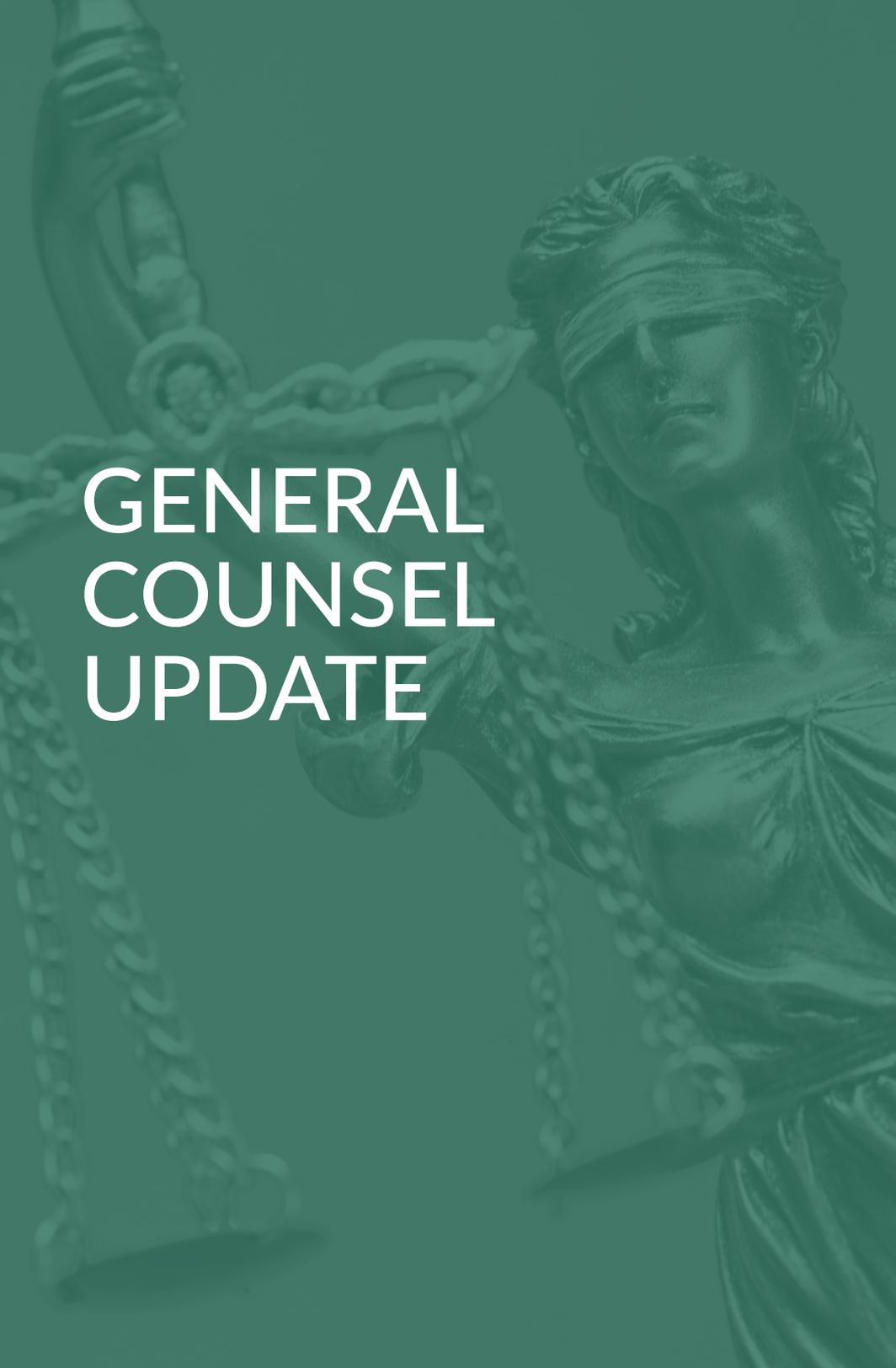
Next Call for Nominations
January 2022
Military Officer Magazine

For More Details on Our Association



MOAA's 2020 Stakeholder's Report





GENERAL COUNSEL UPDATE

General Counsel Update

August 2021

Legal Issues Council & Chapter Leaders Need to Know

Maj Gen Joe Lynch, MOAA General Counsel



MOAA Chapters: Legal Status

- Councils & Chapters are Affiliates
 - Chapters are independent, self-governing, and self-supporting organizations
 - The MOAA Charter authorizes councils & chapters to associate with MOAA and to use MOAA's name, logo, and tag line
- Relationship with MOAA National
 - Separate and distinct organizations
 - Councils & chapters are not agents or subsidiaries of MOAA National
 - They are not covered by MOAA's IRS tax exemption or MOAA's liability insurance

MOAA Chapters: Legal Status

- MOAA Recommendation: Incorporate
 - Protects officers, directors, and members from personal liability in most instances
 - MOAA Council and Chapter Policies and Procedures Guide provides useful templates for Articles of Incorporation and Bylaws
 - The website for the Secretary of State or Corporation Commission for your state provides detailed instructions and forms to use to incorporate
 - Follow the procedures for non-stock corporations (Virginia) or non-profit organizations (in your state)

MOAA Chapters: Legal Status

- Apply to IRS for your tax exempt status
 - IRC 501(c)(19) – *Veterans Organizations*
 - IRC 501(c)(4) – *Social Welfare Organizations*
 - IRC 501(c)(3) – *Religious, Charitable, or Scientific Organizations*
- Tax exempt status depends primarily on
 - Your mission (lobbying and advocacy, scholarships, or community improvement)
 - Source of income (dues, event revenue, donations)
- Exempt Status granted/denied by IRS after review of Articles of Incorporation or other organizational documentation
- Key Reference: *IRS Publication 557*

The Process

- Secretary of State or State Corporation Commission charters the corporation
 - Check availability of name
 - Reasonable fee (Virginia is \$75)
 - Download forms from website and submit
 - Approximately 10 days
- Internal Revenue Service determines tax-exempt status
 - File the Correct IRS Form
 - Pay filing fee of \$600 [\$275 for 501(c)(3) Charities]
 - Generally takes 60 to 90 days, but exempt status is retroactive
 - File timely annual tax return – IRS Form 990-N

Charitable Solicitations

- Soliciting Charitable Contributions
 - Tax Exempt vs. Tax Deduction
 - State Registration Requirements
 - Annual Renewals Required
- Registration Requirements and Exemptions Vary by State
 - “Crowdfunding” is generally considered a solicitation
 - Pay the state's filing fee (Varies)
 - Online website solicitation may trigger out of state registration requirements

MOAA Chapters: Liability Insurance

- MOAA Recommendation:
Chapter/Council Liability Insurance
 - Bad things happen – traffic accidents; food poisoning; alcohol-related injuries; personal data stolen or compromised; contractual indemnification
 - Your homeowners insurance doesn't cover what you do as a chapter or council officer
 - Your chapter has a duty to be a responsible member of your community – if a chapter unintentionally causes harm, it needs to have the means to make it right
 - Litigation is expensive – at least \$30,000 to \$50,000 even for a frivolous claim

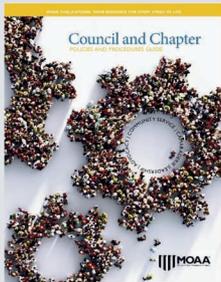
MOAA Chapters: Liability Insurance

- Insurance for Chapter Activities
 - Council and Chapter Insurance is available through MOAA's insurance administrator, Mercer Health & Benefits Administration LLC
 - Up to \$2 million in commercial general liability coverage
 - Provides coverage for legal fees even if suit lacks merit
 - https://ebview.com/pdfgenerator/ViewPdf/moaa/MOAA_Club_Chapter_Liability.pdf
 - Annual cost varies depending on size of chapter. Generally, annual premium through Mercer is around \$350
 - Prices vary -- Check with a local commercial insurance broker

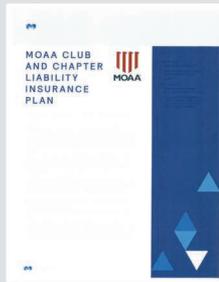
Other Issues

- Chapter Newsletters and Websites
 - Your newsletter/website represents MOAA
 - Things to Avoid
 - Divisive social issues
 - Partisan political issues
 - Service Seals and Symbols
 - DoD/Services own trademark rights on most military service seals and symbols
 - May not be used to identify the chapter
 - Avoid incorporating them in the header, title, or chapter name
 - Prior permission is required (not normally granted)
 - Chapters are authorized to use MOAA seals and symbols

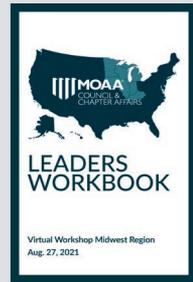
Resources: MOAA Publications



Council and Chapter
Policies and
Procedures Guide



MOAA Club and
Chapter Liability
Insurance Plan



MOAA Council &
Chapter Affairs
Leadership Workbook



MEMBERSHIP & MARKETING UPDATE



Membership & Marketing Update

Elizabeth Limarzi, CAE
Director, Marketing



Today's Environment



How Are We Doing?

350,000+ Members Strong

BASIC to PREMIUM
Upgrades increasing YoY, but behind 2021 projections

New **PREMIUM** Membership acquisition lagging

Continue to grow paid membership pipeline

Added 1,300+ new **LIFE** Members

PREMIUM Member renewal rates stands strong at 78%.

Looking Forward



Live events and recruiting

MOAA television commercial

New member portal

Change in dues structure - 2022

Working Together

How you can help:

- Ask questions
- Share the value of membership with your fellow officers and surviving spouses
- Invite others to join
(Use promotion code: GRASSROOTS)



Elizabeth Limarzi, CAE
Director, Marketing
elizabethl@moaa.org



LEGISLATIVE UPDATE

National Legislative Overview

Meet your HQ team:

Dan Merry Vice President
DanM@moaa.org

René Campos VA/Wounded Warrior Care
ReneC@moaa.org

Mark Belinsky Currently Serving/Retired Affairs
MarkB@moaa.org

Karen Ruedisueli TRICARE & Medicare
KarenR@moaa.org

Jennifer Goodale Military Family Issues
JenniferG@moaa.org

Cory Titus Guard/Reserve/Veterans' Benefits
CoryT@moaa.org

Amanda Meyers Research and Analysis
AmandaM@moaa.org

Allison Reilly Legislative Analyst
AllisonR@moaa.org

Brenden McMahon Legislative Analyst
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116th Congress Accomplishments

Key DoD Highlights:

- Complete elimination of the “Widows’ Tax” in the FY20 NDAA
- FY20 3.1% uniformed services pay raise
- Blocked additional TRICARE fee increases (beyond those already scheduled) in FY20 NDAA
- FY21 3% military pay raise
- **Sec. 717 and 718** in FY21 NDAA: Analysis of impact of downsizing and restructuring of MHS
- Improvements to the EFMP and TRICARE’s Extended Health Care Option
- Hazardous Duty Incentive Pay (HDIP) Parity in FY21 NDAA

Key VA Highlights:

- H.R. 299: Blue Water Navy Vietnam Veterans Act of 2019
- S. 3503: Veterans Education Programs
- H.R. 7105: Johnny Isakson and David P. Roe, M.D. Veterans Health Care and Benefits Improvement Act of 2020
- H.R. 8247: Veterans Comprehensive, Prevention, Access to Care, and Treatment (COMPACT) Act of 2020
- H.R. 8354: Servicemembers and Veterans Initiative Act of 2020
- Addition of three Agent Orange presumptives

Advocacy: State Report Card

MILITARY TAX ASSESSMENT MAP

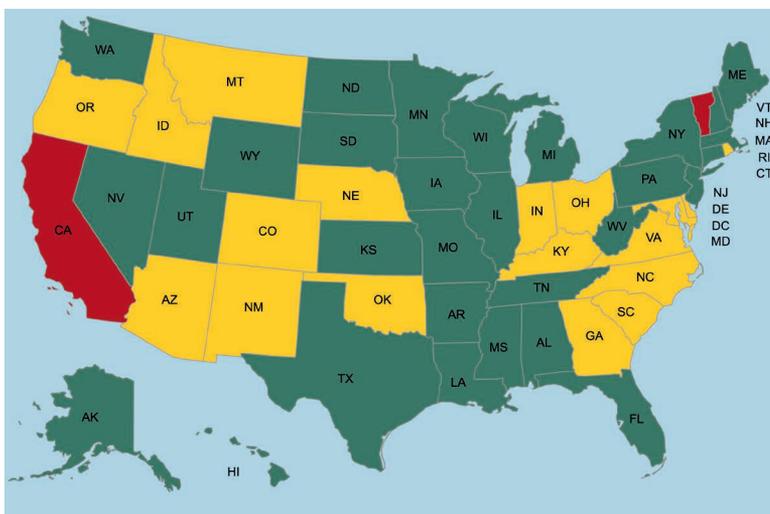
Map Legend

Both military retired pay (MRP) and Survivor Benefit Plan payments (SBP) are fully exempt from state taxation.

MRP and/or SBP receive partial exemption from state taxation.

Neither MRP nor SBP is exempt from state taxation

Source: MOAA Communications; current as of July 26, 2021



- Dual maps
 - State taxation
 - Troop & Family issues
- Proprietary analysis
- Member value
- Marketing campaign
- www.moaa.org/statereportcard

State Legislative Consortium

**Col. Tom Robillard,
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VP South Carolina

State Council

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**Lt. Col. Don Wolfinger,
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Greater St. Louis Chapter/

MO Council

Legislative Affairs

Mobile: (636) 484-0248

Objective

- Facilitate the exchange of information across councils
- Federal Legislative process: "Advocacy in Action" (at the national level by MOAA HQ)
 - Work with staffers/legislators **at local level** for state/federal issues. Local constituents
- Sharing of programs, issues and processes at the state level.
- Use virtual communications (conference calls, Skype, Facetime, MOAA Regional Training program) to share information
- Does not replace council/chapter legislative affairs activities
- MOAA Legislative Team provides guidance



A woman is shown from the chest up, holding a folded American flag. She is wearing a dark top and a pearl necklace. The image is overlaid with a semi-transparent blue filter. The text 'SURVIVING SPOUSE UPDATE' is written in white, bold, sans-serif capital letters on the left side of the image.

SURVIVING SPOUSE UPDATE

History

- 2004: Created as the Auxiliary Member Advisory Committee (AMAC).
- 2013: Became full voting members of MOAA
- 2013: Changed name to Surviving Spouse Advisory Committee
- 2014: Surviving Spouse Member Joyce Harte was elected to the MOAA BOD
- 2018: Created the Surviving Spouse Virtual Chapter
- 2020: Changed name to Surviving Spouse Advisory Council

We have come a long way in a few short years!

Background

- **Who we are:** 6 members from different states and backgrounds, plus the BOD SS rep. Serving a term of 4-6 years
- **Who we represent:** All surviving spouses of a military officer who was or could have been a member of MOAA
- **Our charter:** To advise the MOAA president on issues unique to surviving spouses and, in coordination with the Surviving Spouse Board Member, provide the surviving spouse perspective in accomplishing MOAA key strategic goals

MOAA Key Values

Promote the key values of MOAA:

- Advocacy
- Membership
- Council & Chapter Support
- Engagement/Resources
- MOAA Foundation and Scholarship Fund

SSAC Three E's

We accomplish these goals as a council through:

- Education
 - Encouragement
 - Engagement

Educate

We educate:

- Surviving spouses & spouses
- Elected representatives
- MOAA members
- The military community

About issues that affect all military but especially surviving spouses and spouses.

Tips for Educating Chapter Members and Surviving Spouses

- Use the term 'Surviving Spouse' instead of 'Auxiliary.'
- Ensure everyone in the chapter knows surviving spouses are regular members.
- Train Surviving Spouse Liaisons for their position.
- Provide them with the resources they need to do their job.
- Listen!

Encourage

- We encourage Surviving Spouses to be involved in MOAA Chapters and Councils;
- We encourage military members to accept Surviving Spouses as important members of their chapter and council; and
- We encourage eligible surviving spouse non-members to join both the local chapter and National MOAA.

Tips for Encouraging Surviving Spouses

- Encourage Surviving Spouse participation within Councils/Chapters.
- Appoint/elect them to leadership roles.
- Put them in charge of special projects.
- Initiate post-death contact, invite them to chapter meetings.
- Welcome and include in all chapter activities.
- Request feedback.
- Submit for national recognition (Surviving Spouse Liaison Excellence Award)

Engage

We engage by

- Participating in the legislative process
- Speaking to groups about MOAA
- Coordinating major events that bring attention to MOAA
- Providing support from our personal experiences to other surviving spouses
- We tell our story!

Tips for Engaging Surviving Spouses

- Appoint to Chapter Board.
- Design programs of interest.
- Elect to leadership positions.
- Ask for recommendations and program ideas.
- Include Surviving Spouses in all aspects of chapter management.

Engagement: Publication Updates



- Aging Into Medicare
- Estate Planning
- Benefits Planning Guide
- Guard-Reserve Retirement Checklist
- Remarriage Guide
- Help Your Survivors Now
- Survivor's Checklist
- Concurrent Receipt Update
- Marketing Yourself
- Military Spouse Career Guide
- And More>> www.moaa.org/publications

Stay Informed

- Learn about MOAA benefits & support!
- Get acquainted with the Veterans Administration Website (VA.gov.)
 - Learn about Agent Orange & other causes of vets' illnesses
 - Get latest information on cemeteries & burials
 - Research Aid & Attendance
 - Financial assistance available through services

Information and Support

- MOAA website – Surviving Spouse Section
- Surviving Spouse Advisory Council
- Council/Chapter Surviving Spouse Liaison
- SSAC monthly/archived articles
- Support during personal crisis
- Day After Calls – Minnesota Chapter
- Advocates for Surviving Spouse issues
- Surviving Spouse Virtual Chapter 02
- VA website; AARP; Military.com

Surviving Spouse Virtual Chapter 02

- Connecting Surviving Spouses including Hawaii, Virgin Islands, Puerto Rico and Europe
- Providing opportunities to Encourage, Educate and Engage
- Must be a MOAA member
- No dues
- Virtual meetings quarterly (1–1½ hour)

Education of Surviving Spouses and Spouses: Planning Ahead!

- Plan Ahead!
 - Encourage members & spouses to talk to each other about death and ways to prepare.
- Help your spouse be a surviving spouse before that time in your lives happens.
 - Gather important papers: DD214, wills, living will, durable power of attorney, insurance policies, passwords, birth/marriage certificates, etc.
 - Check all signature cards.
 - Review all insurance policies.
 - Make sure utilities are in BOTH names.
 - Open a credit card account in YOUR name.
 - Review all investments with a financial adviser.
 - Insure bank accounts are accessible.
 - Gather all passwords in one place.
 - Make sure death certificate identifies cause of death correctly.

Things to Remember

First

- Sit down and have a Heart-to-Heart talk with your spouse and your children about death and what happens after. It is a gift of love!
- Schedule at least one chapter meeting a year where you discuss these issues. MOAA, SSAC & your Surviving Spouse Liaison can provide you with a wealth of information.

Second

- Make an effort to recruit surviving spouses in your area to join your chapter.
- When they do join, get them involved, appoint them to your board, support them in important projects and LISTEN!
- NC Chapter President: “The involvement & contributions of the surviving spouses in our chapter have greatly increased the vibrancy, energy and strength of our chapter!”

MOAA COMMS UPDATE



Supporting Our Chapters

- Member spotlight (weekly in newsletter/monthly in magazine)
- Annual *Military Officer* special report
- Training, editing, design assists
- Communications Awards & more

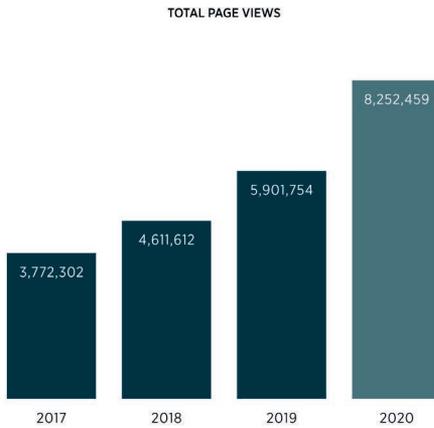


Growing Readership Online

- MOAA.org earns more than 8 million page views per year
- *The MOAA Newsletter* open rate is above 30 percent, exceeding industry averages
- Our Facebook page regularly hits higher engagement than the biggest VSOs

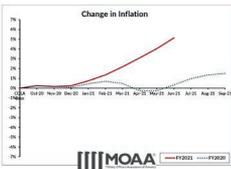


MOAA.org Traffic



Most Read Online

- TRICARE news
- COLA updates and news
- Pay and benefits
- Arlington National Cemetery eligibility
- State tax breaks and tax assistance



Top-Notch Storytelling

We are focused on choosing compelling content that resonates with our audience in our magazine and online.



New Initiatives

- MOAA Life Member LTC Olivia Nunn leading MOAA's Never Stop Serving Podcast
- CAPT Paul Frost, from MOAA HQ, has launched our new TRICARE Toolkit column
- Staff Writer Amanda Dolasinski is producing *Military Officer* audio storytelling series



Emphasis on Video

MOAA Comms staffers shoot and edit video for our website, YouTube and social media channels.



Centered on our Members

We prioritize interesting and inspiring stories that feature our diverse and exceptional membership.



A photograph with a dark blue overlay. In the foreground, a man in a suit and glasses is gesturing with his right hand towards two men in military uniforms. The men in uniform are standing behind a table covered with a white cloth. On the table, there are several blue certificates or diplomas. The background shows a room with a drop ceiling and recessed lights.

CHAPTER MANAGEMENT

Chapter Overview

The healthy chapter:

- Chapter Purpose/Mission
- Legislative Advocacy/Engagement
- Impactful Community Service
- Membership Growth

Often reflected by:

- Use of committee module/other electronic tools
- Up-to-date leadership roster
- Recruiting and retention statistics
- Use of sponsorship and grant programs
- National and Council engagement
- Training and collaboration

Affiliate Checklist

- Have a stated and known mission
- Officer familiarity with the MOAA website and P&P Guide
- Subscribe to *The MOAA Newsletter*
- Proactively address renewals
- Have a succession plan
- Regularly submit awards nominations
- Update CM roster and check NRT monthly
- Use existing technology/tools
- Publish a newsletter (print or electronic)
- Have a well-maintained website and social media presence
- Regularly engage with Council and national CCA
- Regularly attend offered training
- Engage in community service and advocacy activities
- Engage with other MSOs/VSOs/Coalitions/ Chamber of Commerce

Grassroots Advocacy

Goal: *Influence in each congressional district*

- Legislative chair/liaison
- Coordinate Council and Chapter efforts
- Foster relationships with elected officials
- Visit legislators/staffers in home offices
- Participate in the State Legislative Exchange Forum
- Keep your chapter members informed and involved
 - Legislative Updates/Alerts in The MOAA Newsletter (weekly)
 - Legislative Action Center messages
 - New pull-down menu to track chapter member participation
 - Participate in Annual Advocacy Events
- Join Virtual Chapter(s)

2021 Community Outreach Grants

| Council/Chapter | Summary of Program |
|------------------------|--|
| Alabama Council | Programs promoting recovery and tele-peer support to veterans |
| Alamo TX | Veteran transition assistance, 1 day event |
| Arizona | Care packages for local/deployed military |
| Cape Canaveral FL | Emergency relief, rent, utilities, food, etc., for at-risk or homeless veterans and their families |
| Clearwater FL | K9 Service Dog Therapy Collaboration to eliminate veteran suicide |
| El Paso TX | Therapeutic Virtual Art Classrooms for active duty, veterans & families - Resiliency Through Art |
| Falcons Landing VA | Direct financial support to veterans/spouses with urgent need |
| Grand Canyon AZ | Housing, food, and emergency financial relief for veterans in need |
| Grand Strand NC | Veterans' emergency assistance and support for those facing homelessness |
| Greater Baton Rouge | Outreach to deployed servicemembers |
| Greater Dallas/N TX | Emergency assistance for veterans facing homelessness, eviction, utility and transportation loss |
| Greater St. Louis MO | Financial support to active duty, veterans, and families to improve quality of life |
| Historic Mayport FL | Food assistance and support to active duty military families |
| Indian River FL | Critical home improvements for veteran homeowners unable to do repairs |
| Lee Coast FL | Homeless veteran mentoring and development program |
| Luke AZ | Housing, food, emergency financial assistance to broad military community |
| New River NC | Armed Forces Day concert supporting Fisher Houses of Camp LeJeune and Fort Bragg |
| Northwest Florida | Provide commissary gift cards to E-4 and below in conjunction w/First Sergeant Councils |
| Old Capitol Area GA | Lodging for families of veterans at the Georgia War Veterans' Home |
| Olympia Area WA | School supplies for military children |
| Olympic Peninsula WA | Purchasing computers for Veteran's Homeless Shelter |
| Sarasota FL | Retreat for military members, Veterans, Gold Star Mothers, and families |
| South Central FL | Financial aid and food pantry supplies to Veterans |
| Southeast Idaho | Veterans Outreach booth at State Fair to provide assistance and info to vets |
| Southeastern NC | Veteran Education Assistance Grants for college students only |
| Southeastern WI | Camp maintenance/improvements for military children who have lost a family member |
| Southwest Florida | JROTC involvement with veterans in assisted living and nursing facilities |
| Southwest Virginia | Providing food and other personal essentials to military families |
| St. Petersburg Area FL | Purchasing and repairs to homes for homeless veterans |
| Tampa FL | Art rehab therapy and assisting families of wounded during their stay |
| Treasure Coast FL | Providing hot meals to at-risk and homeless veterans and their families |
| Tucson AZ | Virtual academic engagement for students and parents |

Chapters received additional funds to support COVID-19 specific efforts

Recruiting Best Practices

- **Every member is a recruiter**
- Establish recruiting budget line
- Create internal recruiting competition
- Build a recruiting package (invitation letter, current newsletter, membership application)
- Always carry recruiting info
- Provide online join option, use online dues program
- Have a website or web presence
- Use social media
- Conduct meetings at different venues and times
- Connect with base retirement services office or transition center
- Strive for and earn recruiting and retention incentives and awards
- Utilize Sales Training techniques

Why does the prospect want to join MOAA?

vs

Why did you join MOAA?

Inclusion and Retention



- Welcoming, diverse environment
- Integrate new members quickly
- First impression is key
- Sponsors for new members
- Survey chapter members
- Programming
 - Current events, interests
 - Mission
 - Social

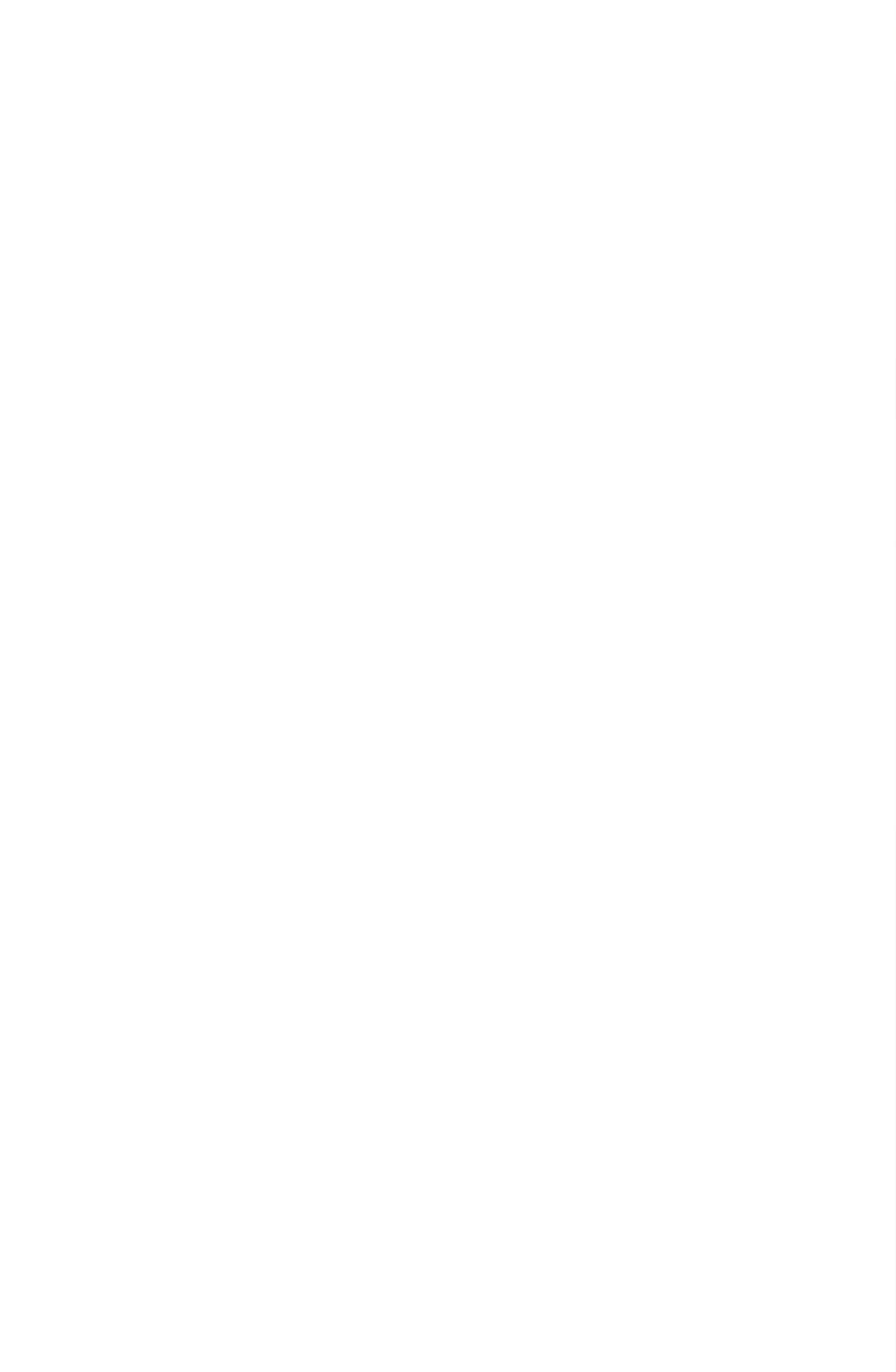
Leadership Succession Tips

- Review present bylaws/fill critical positions first
- Review current term limits
- Consider “fleet up” model with a deep bench
- Generate interest in leadership positions well before nominations
- Identify potential candidates during normal course of business
- Groom and mentor potential leaders and get them involved in a chapter committee
- Be inclusive and proactive in including surviving spouse members and spouses
- Develop a chapter operations handbook
- Have an active awards/recognition program

Resources



- www.MOAA.org
 - C&C Policies and Procedures Guide
 - Electronic Appendix
 - Leaders Workbook
 - Electronic Newsletter
- chapters@moaa.org
- 1-800-234-MOAA



A woman is shown from the chest up, holding a folded American flag. She is wearing a dark top and a pearl necklace. The image is overlaid with a semi-transparent blue filter. The text is centered over the flag.

SURVIVING SPOUSE LIAISON TRAINING

Who can be a Surviving Spouse Liaison?

- Any member – male or female – or a spouse can be appointed to the position: Does not have to be a surviving spouse
- Councils & Chapters with an assigned Surviving Spouse Liaison are awarded 10 points on their LOE scoring.

What is Your Role?

- Primary Point of Contact for Surviving Spouse & Spouse legislative & benefits issues
- Advise the council or chapter president on Surviving Spouse issues
- Encourage, Engage & Educate surviving spouses and spouses of members to take an active role in the chapter/council and MOAA advocacy
- Assist members during times of loss



Encourage, Engage, and Educate



5 Key Focus Areas

Promote the key values of MOAA:

- Advocacy
- Membership
- Council & Chapter support
- Engagement/resources
- The MOAA Foundation and Scholarship Fund

Membership

- Grow surviving spouse membership in both National MOAA & local chapters
- Constant reminder: A surviving spouse is a regular member!
- The spouse did not have to be a MOAA member a surviving spouse can join on their own.
- Membership categories available:
 - LIFE (can be inherited by surviving spouse or purchased)
 - Premium 1/2/3-year terms available (discounted for surviving spouses)
 - Basic – Free
 - *See Brochure or MOAA.org for more information*
- Encourage a surviving spouse to join MOAA.;
 - Initiate post-death contact – invite to chapter meetings
 - Make phone calls; offer rides
 - Welcome & include in ALL chapter activities
 - Inform potential members about MOAA benefits
 - Always use the term “Surviving Spouse” rather than “Auxiliary”
 - Request feedback

Council & Chapter Support

- Encourage participation within the chapter
- Apply for chapter/council board
- Solicit input to design programs of interest
- Volunteer for leadership positions
- Incorporate Surviving Spouses in all aspects of chapter management
- Take charge! Design, Develop, Direct a Special Project!
- Be an advocate. Promote MOAA's legislative issues.
- Educate about personal affairs & actions to take before and after a personal loss.
- Recognize outstanding performance – local & national (i.e., MOAA Surviving Spouse Liaison Excellence Award).

Engagement & Resources

- Take advantage of MOAA website (MOAA.org), publications, weekly newsletters & articles.
- Share information with all members, spouses & potential members.
- Ways to stay informed:
 - MOAA Website MOAA.org
 - ☑ Check “I am a Surviving Spouse.”
 - SSAC articles that appear on the website under Surviving Spouse Resources, Councils/Chapters & Newsletters
 - MOAA publications/brochures about Surviving Spouse issues
 - Regional Leadership Training Workshops
 - MOAA Webinars on relevant topics
 - Legislative updates on all military issues: pay, housing, health care, commissary, etc.
 - Participation in the Surviving Spouse Virtual Chapter
 - Membership in the MOAA Facebook group – MOAA Surviving Spouses & Friends
 - USAA Survivor Relations Team

Education of Surviving Spouses & Spouses: Planning Ahead!

- PLAN AHEAD!
 - Encourage members & spouses to talk to each other about death and ways to prepare.
- Help your spouse be a surviving spouse before that time in your lives happens.
 - Gather important papers: DD214, wills, living will, durable power of attorney, insurance policies, birth/marriage certificates, passwords, etc.
 - Check all signature cards.
 - Review all insurance policies.
 - Make sure utilities are in BOTH names.
 - Open a credit card account in YOUR name.
 - Review all investments with a financial adviser.
 - Insure bank accounts are accessible.
 - Gather all passwords in one place.
 - Make sure death certificate identifies cause of death correctly.

Surviving Spouse Virtual Chapter

- Connecting Surviving Spouses throughout the U.S. and across the world
- Providing opportunities to Encourage, Engage, and Educate
- Must be a MOAA Member
- No dues
- Virtual meetings are held monthly
- Meetings are the 3rd Tuesday each month
- Next Meeting: Tuesday, Sept. 21, 1p.m. (Eastern)
- Discussion can include:
 - Legislative updates
 - Health care issues
 - Financial Planning
 - Other issues important to surviving spouses & spouses
 - Input from members – opportunity to share information/ask questions/offer comments
- To join, email mssvc02@gmail.com

Stay Informed

Learn about MOAA benefits & support!

- Get acquainted with the Veterans Affairs Website (VA.gov)
 - Learn about Agent Orange & other causes of vets' illnesses
 - Get latest information on cemeteries & burials
 - Research Aid & Attendance
 - Financial Assistance available through services

Additional information can be found in the following places:

- AARP.org
- Military.com
- Militarycoalition.org
Health Care Committee- Survivors
- Militaryonesource.mil
- Minnesota Chapter "The Day After Calls"
(MOAA.org/DayAfter)
- Surviving Spouse Virtual Chapter
mssvc02@gmail.com
- MOAA Surviving Spouses & Friends Facebook group

NOTE: As a surviving spouse, it is important that you think about yourself and YOUR survivors and the things they will need to know!

Surviving Spouse Contacts

MOAA Board of Directors

Gail Joyce,
CAPT Kathy Thorp, USN (Ret)

Surviving Spouse Advisory Council Members:

email: SSComm@moaa.org

Gail Joyce, Chair

Barbara Smith, First Vice Chair
Chapters & Councils

Nancy Mullen, Second Vice Chair
Issues related to active duty/reserve/
National Guard deaths

Kathy Thorp, Board Member

Barbara Bowman, Renee Brunelle, Pat Green,
Vivianne Wersel

MOAA Staff Advisors

LTC Suzanne Walker, USA (Ret)

Celine Hamilton, Member Service Representative

Surviving Spouse Virtual Chapter (SSVC)

Micki Costello, President

Gail Joyce, Vice President

Barbara Smith, Membership Chair

WORKSHOP CLOSING REMARKS

MOAA Making a Difference



For 14 Straight Years



The Hill's Top Lobbyists 2020

A Record of Advocacy Achievement

| <u>Persona</u> | <u>Value Added</u> |
|---|--|
| • 44-year-old O-5 retiree | • \$165K in retirement earnings over 20yrs |
| • 65-year-old Medicare beneficiary | • Saving at least \$5K annually in Medicare supplement premiums |
| • 70-year-old SBP/DIC recipient | • Repeal provides \$12K/year (by Jan '23) |
| • 50-year-old military spouse working on a degree | • Full tuition at public university and \$2,000/month average allowance |
| • Retires age <65 | • Fought DoD's proposed TRICARE Select fee of \$900/year (family) ... Congress backed down to \$300/year |

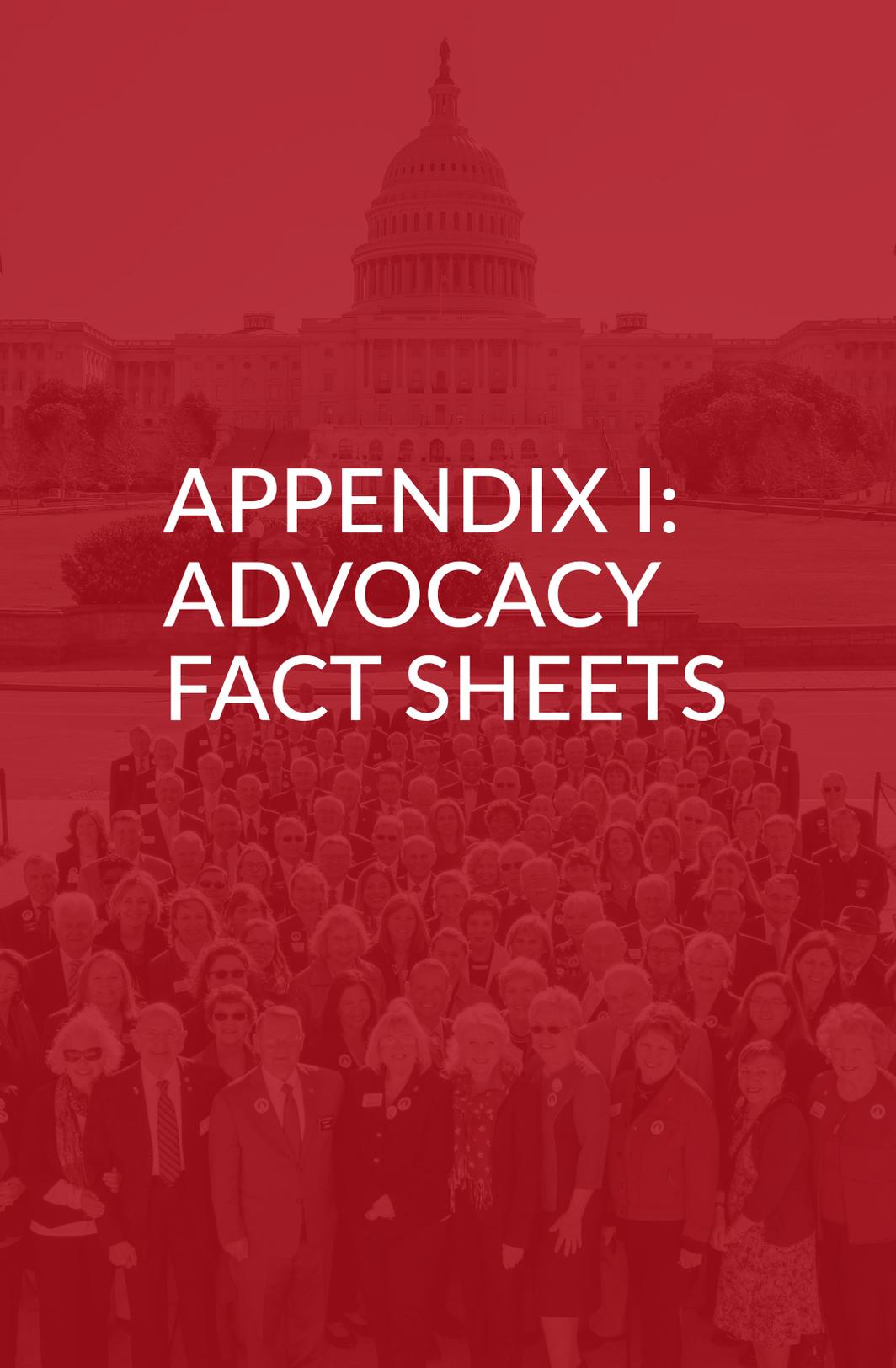
Why Advocacy & Engagement Are Team Sports

- Each of us must be engaged – active duty, retired, veterans & military spouses – to encourage future generations to serve!
- Continue to educate & inform elected officials:
 - 96 veterans serving today in Congress – 18%
 - 129 in 2007 – 24%
 - 389 in 1969 – 73%
- Speak out & champion the needs of our military community!
- Defend military, veteran & survivor benefits in this environment of divisive politics & tight budgets

Never Stop Serving



"I am not sure I will ever enjoy working for an organization as much as I have enjoyed working for MOAA!"



APPENDIX I: ADVOCACY FACT SHEETS



A series of horizontal lines for writing, spaced evenly down the page.



Congress: Provide a Basic Needs Allowance for Military Families Facing Food Insecurity

What Is the Basic Needs Allowance?

The proposed Basic Needs Allowance would give an estimated \$400 monthly subsidy to servicemembers with a household gross income (not including the Basic Allowance for Housing, or BAH) at or below 130% of the poverty line. The subsidy is meant to ensure no military family faces food insecurity. It would be accompanied by financial education resources.

The Congressional Budget Office (CBO) estimates around **10,200 servicemembers would benefit from the monthly allowance.** The program would cost \$175 million from 2021 through 2024, according to CBO projections — a little less than \$44 million per fiscal year.

Servicemembers would not rely on this program for extended periods of time. Instead, it would provide much-needed temporary assistance during times of financial difficulty, mostly among junior enlisted.

This program also will alleviate the need for servicemembers to participate in the government-sponsored Supplemental Nutrition Assistance Program (SNAP), thus reducing mandatory spending in this area and making the overall program cost minimal when compared to the DoD budget.

Why Is It Needed?

Many military families facing food insecurity do not qualify for SNAP because BAH is included in the program's calculation of gross income. This barrier to SNAP participation has led to thousands of military families seeking assistance from food pantries, many operating on or near military installations. The Armed Services YMCA, one of the top food pantry providers at military installations, reports a 400% increase in demand for assistance during the pandemic. The mental and physical impacts of food insecurity directly impact a servicemember's ability to do their job, compromising military readiness.

Additionally, the DoD has spent billions of dollars looking into obesity in the military, increasing the recruitment pool, and Total Force Fitness. Food insecurity plays a part in all of these; addressing it with a wider approach will create positive change for mental and physical health, and could potentially save dollars spent addressing these issues.

To learn more about SNAP participation among servicemembers and MOAA's concerns with the 14th Quadrennial Review of Military Compensation report on this topic, visit MOAA.org/foodinsecurity.



You Can Help: Cosponsor H.R. 2339

- We are seeking bipartisan support for our military families facing food insecurity. Your cosponsorship of this legislation will help us secure this bill in the FY 2022 National Defense Authorization Act.
- **Support for military families.** Will you join us and the coalition of more than 35 military and veterans service organizations committed to passing this legislation?
- **These organizations endorse this legislation and represent millions of Americans:** The Military Coalition, Mazon, Blue Star Families, The White Oak Collaborative, and other partners.



PHOTO BY CPL ALFRED V. LOPEZ/USMC

Congress: Pass Comprehensive Toxic Exposure Reform

Background

Servicemembers, veterans, and their families from every generation face lifelong challenges from toxic exposures.

Oct. 31, 2021, will mark the 50th anniversary of the final helicopter flight when Agent Orange was used in Vietnam. Thirty years have passed since Gulf War veterans were exposed to myriad hazardous materials and toxins. Twenty years ago, the first troops were deployed to fight the global war on terror, many serving near open-air burn pits and other environmental dangers.

Each war poses unique hazards and exposures for servicemembers, and each conflict has led to tens of thousands of veterans suffering from illnesses or disabilities long after they returned home. Despite the documented history of potential health consequences connected to the dangers they encountered during service, many servicemembers are not receiving commensurate health care and benefits.

Action 1: Concede exposure

The first step toward supporting servicemembers who fought in Southwest

Asia is to concede exposure to toxic substances. The Veterans Burn Pits Exposure Recognition Act will support claims by:

- Specifying countries and time periods of service: Those who served in a given nation at a time when these burn pits were active would be presumed to have been exposed to burn pit toxins.
- Listing airborne hazards and toxic substances that a servicemember was exposed to within the specified countries.
- Requiring the VA to provide a medical exam to determine any links between medical conditions and burn pit exposures.

For Army combat engineer Sgt. Mike Geib, the symptoms of Gulf War illness were immediate. Before he deployed, he was healthy and excelling on his physical fitness tests. But just 10 years later, he was a 28-year-old Army sergeant medically discharged with a 10% disability rating for asthma.

"I couldn't run, I was turning blue," Geib said, describing how serious his respiratory issues had become. "I knew in

my heart. I knew it was from exposure."

During the Gulf War, Geib's unit traveled through Saudi Arabia, Iraq, and Kuwait, where he worked in close proximity to the oil well fires. When the unit returned to the United States, he stayed behind to paint equipment with a paint that was later determined to contain carcinogens.

In the 27 years since he was discharged, Geib's health has suffered and new diagnoses of fibromyalgia, irritable bowel syndrome, memory loss, migraines and respiratory issues have increased his disability rating to 100%.

"Believe us," he said. "We



Army Sgt. Mike Geib was 28 when he was medically discharged. Since then, he has fought a long battle for assistance.

were there. We were the boots on the ground.”

Conceding exposure to hazardous materials would reduce the burden on the veteran to prove illnesses, which may not be revealed until decades later, are related to military service. Presuming exposure would expedite the time it takes for a veteran to file for VA benefits.

Action 2: Increase Presumptive Reporting

When there is a sufficient level of association between a service-related exposure and an illness, Congress establishes a “presumptive exposure” to remove the burden of proof from servicemembers.

Congress should require the VA to provide a public, quarterly report on all future veterans’ claims submitted to the VA for presumptive conditions or “special interest conditions,” such as illnesses being evaluated for potential links to burn pit exposure.

When Col. Donald Siebenaler, USA (Ret), was diagnosed with Alzheimer’s disease, he and his wife, Rita, reflected on what could have led to the disease — and wondered if it was related to his service in Vietnam.

“He did it joyfully,” Rita Siebenaler said of her husband’s service. “He’s paying the price for it now. ... I really would like this investigated further because Alzheimer’s takes such a toll on individual families.”

In 1965, Siebenaler served as a company commander in Vietnam, where he was exposed to Agent Orange. Decades later, he was diagnosed with Alzheimer’s by a neurologist conducting a grant-funded study at Georgetown University.

Because Alzheimer’s is not part of the VA’s presumptive

list, the family does not receive financial assistance for Siebenaler’s health care. Rita Siebenaler said her family is paying exorbitant out-of-pocket expenses but knows other military families may have to go without care.

Research is emerging that dementia may be linked to Agent Orange exposure, but under current law, the VA is not required to respond or act to support veterans. Increasing presumptive reporting would ensure current presumptives are helping veterans and increase awareness around emerging conditions.

Action 3: Expand Veteran Health Care and Improve Presumptives Process

As the health consequences of burn pits and other toxic substances continue to be studied, the veteran community is witnessing a rise in rare cancers and other illnesses. We must ensure our veterans receive quality health care for these illnesses. The Toxic Exposure in the American Military (TEAM) Act supports veterans by:

- Granting the VA health care enrollment in Priority Group 6 to veterans who served in areas of known toxic exposure and creating mechanisms for the enrollment of veterans who may be exposed to toxic substances in the future.
- Establishing an advisory commission to review toxic exposures and recommend independent studies to the VA and Congress.
- Requiring the VA to respond to whether illnesses associated with toxic exposure by scientific evidence should be added as presumptive conditions.



Congress: Enact these bills to support comprehensive toxic exposure reform

Cosponsor the Veterans Burn Pits Exposure Recognition Act, S. 437/H.R. 2436

- Concede exposure for those who served where burn pits were used in Southwest Asia.

Increase reporting, transparency, and oversight of established presumptives and special interest conditions.

Cosponsor the Toxic Exposure in the American Military (TEAM) Act, S. 927/H.R. 2127

- Support health care for exposed servicemembers.
- Create an advisory committee to recommend research.
- Require the VA to respond to scientific evidence associating diseases with toxic exposures.



Military kids currently impacted by this issue were toddlers or preschoolers on 9/11 and made many sacrifices as part of military families.

Parity for TRICARE Young Adults

Background

We urge Congress to fix a TRICARE eligibility gap for young adults that has existed for more than a decade. Commercial plans that offer dependent child coverage are required to make the coverage available until the adult child reaches the age of 26. There is no separate premium for families who elect to keep adult children on commercial plans. This protects young adults' access to affordable health care even if they elect to pursue advanced degrees or face barriers obtaining their own employer-sponsored coverage.

In contrast, TRICARE policy terminates coverage for young adults at age 21 (or 23 if a full-time student). The FY 2011 National Defense Authorization Act established TRICARE Young Adult (TYA) extending eligibility to age 26 but, unlike families covered by commercial plans, TYA enrollees are required by law to cover the full cost of the program via a separate monthly premium. For 2021, the monthly premium to cover a young adult is \$459 for TYA Prime (up 22% versus 2020) and \$257 for TYA Select (up 13% versus 2020).

TRICARE Young Adult Program Is Not Sustainable

Young adult health care coverage is an issue that can impact any military family, but it is particularly important for career servicemembers and their families who are most likely to be covered by TRICARE when their children reach adulthood. In 2018, approximately 85% of TYA enrollees were the children of working-age retirees while 15% were the children of active duty families.

TYA premiums have increased dramatically since the program's inception,

leading to lower enrollment and a beneficiary pool skewed toward those with chronic medical conditions. TYA Prime premiums are up 160% since 2012 (an average annual increase of more than 14%) while the cost of TYA Select has grown 69% (up more than 7% per year, on average.)

As premiums have increased, the number of healthy young adults enrolling in TYA has declined. That results in a beneficiary pool — particularly for TYA Prime — with a disproportionate number of young adults who have significant medical needs. These needs, with fewer beneficiaries covering program costs, lead to further premium increases, creating a cycle of higher costs and fewer families paying them. This process likely will continue until TYA is no longer a viable program.

Military Health System Reform Should Mean More Than Just Fee Increases

Military Health System (MHS) reforms passed into law with the FY 2017 NDAA have meant one hit after another in terms of out-of-pocket costs, particularly for retirees.

Since 2018, provider office visit copays have more than doubled. Pharmacy copays have increased twice, while a growing number of prescription drugs are no longer covered by TRICARE at all. As of Jan 1, 2021, retirees on TRICARE Select have an all-new enrollment fee and a higher catastrophic cap. Retirees are also being moved out of military treatment facilities, where their care was free, and into the civilian network, where they face cost sharing.

MHS reform should be about more than just shifting costs

to beneficiaries. Eliminating TYA premiums not only brings TRICARE on par with other employer sponsored plans, but it also targets an improvement at a beneficiary segment that is paying significantly more out of pocket as a result of MHS reform. And these changes should not come at the expense of others who've earned their benefits: MOAA opposes funding this expansion by raising TRICARE fees or cutting other uniformed services programs.

Military Kids Serve, Too

We appreciate Congress and DoD have recognized the unique challenges military kids face. According to the Department of Defense Education Activity, the average child in a military family will move six to nine times during their school years. Deployments and other family separations are also a fact of life for military kids, and a growing body of research shows many kids suffer emotional and educational impacts from these experiences. Yet current TRICARE policy leaves military kids transitioning into adulthood without the same health care protections afforded to families with commercial health care plans.

Ensuring health care access and affordability is particularly important during the current pandemic. As COVID-19 impacts higher education pathways and makes it more difficult for young adults to find jobs, we must ensure military families who have sacrificed so much in support of our nation have the same health care protections for their young adult children as their civilian counterparts covered by commercial plans.

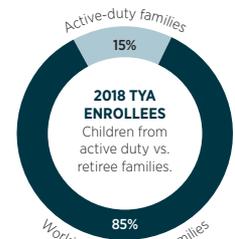
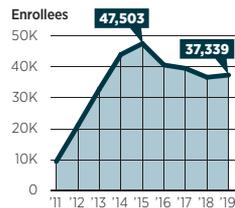


Congress: Support H.R. 475, The Health Care Fairness for Military Families Act

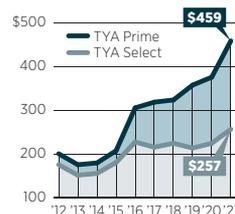
Please ensure military families have the same health care protections for their young adult children as their civilian counterparts covered by commercial plans.

BY THE NUMBERS:

ENROLLMENT DECLINE
TYA Enrollment has declined 21% since its peak in 2015.



MONTHLY PREMIUMS
2021 has seen an increase of 22% for Prime and 13% for Select.



SOURCE: ANNUAL EVALUATION OF THE TRICARE PROGRAM



APPENDIX II: MARKETING TRAINING



Growing Chapter Membership: The Tools You Need



3 Core Factors



“Move off the Solution” Formula



“The Move”



Move to “PROBLEMS”
the member wants to address
or
Move to “RESULTS”
the member wants to achieve

“Structure the Conversation” Steps

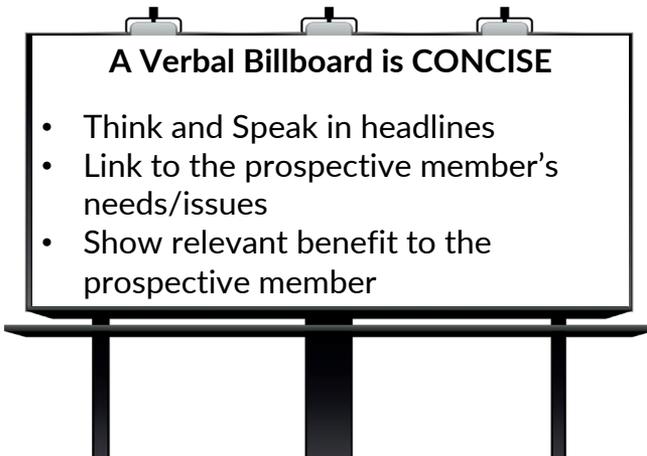
- Get a quick list of the issues.
- Make sure the list is complete.
- Find out which issue is most important to the prospective member.
- Go in depth — develop evidence and impact.
- Summarize.
 - Did I get it right? Did I leave anything out?

Skill Sets: Resolving Yellow Lights

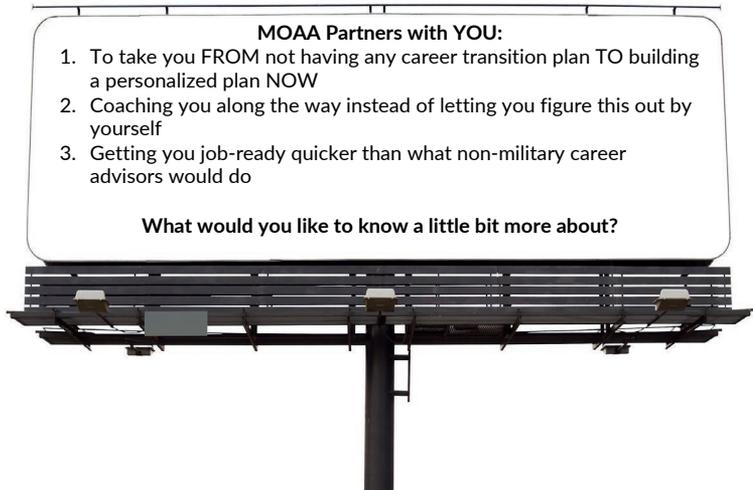
- Slow down for Yellow Lights
- Yellow Lights are an opportunity to express your intent and desire to create mutual value.
- If you are going to hit a red light, the sooner the better.
- A red light is not a failure. Failure is making a red light needlessly more expensive.



Billboards



MOAA National Example



Billboard Formula

[Attention grabbing statement]

1. supporting evidence
2. Feature / benefit
3. From X → To Y statement

[Call to Action!]

Make Your Own Billboard

Create your own billboard for
the following topics:

- Advocacy
- Networking
- Community Service
- Surviving Spouse Involvement

Growing Chapter Membership



getting to
yes

The image features a person's hands typing on a laptop keyboard, with a Gantt chart visible in the background. The entire scene is overlaid with a semi-transparent blue filter. The text is centered and reads:

APPENDIX III: COMMITTEE MODULE TRAINING

What is the Committee Module?

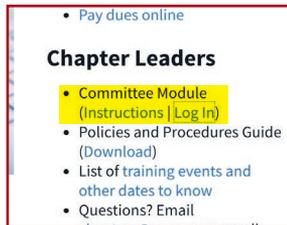
- Your online chapter 'roster'
 - Shows changes you make in real time.
 - Provides chapter member information.
- Your monthly recruiting list
 - Replaces the previously provided semiannual report.

Committee Module Access

- Accessed via the MOAA website
- Two officers from each chapter have access.
 - Default is president and membership chair.
 - To substitute, please contact us at chapters@moaa.org or (800) 234-6622.
- MOAA member login is used.

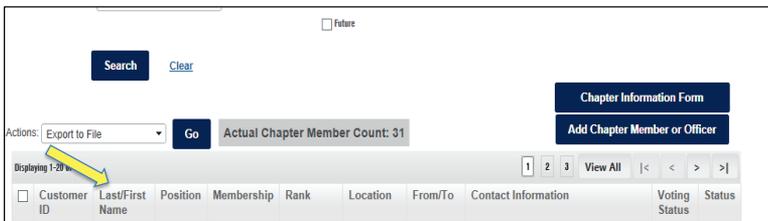
Updated Way to Log In

- Go to moaa.org.
- Go to About MOAA.
- Click on Councils and Chapters
- Click on Committee Module Login.



View All and Sort

- Make sure to click 'View All' (blue arrow) and sort by 'Last/First Name' (yellow arrow) before making changes



Adding Chapter Members

- Use the 'Add Chapter Member or Officer' button.
 - You will need their email address or member number (customer ID number).
- Enter in their chapter membership information.

Removing Members/Officers

- Adding an end date removes them from the current module but does not delete their record.
- Chapter members need an end date when they leave the chapter.
- Officers need an end date when they are no longer in that position.
 - Only on the position that they hold
- Important distinction: If a member has two listings on the Committee Module as a 'Member,' please inform us so we can remove their duplicate record.

Multiple Listings

- **Good**

| | | |
|--------------------------|--------------------|------------------|
| <input type="checkbox"/> | Trout, Mike | Secretary |
| <input type="checkbox"/> | Trout, Mike | Treasurer |
| <input type="checkbox"/> | Twyne, Victoria | Member |
| <input type="checkbox"/> | Twyne, Victoria | Membership Chair |
| <input type="checkbox"/> | Twyne, Victoria | Roster Contact |
| <input type="checkbox"/> | Willingham, Joshua | Member |

- **Bad**

| | | |
|------------------|--------|--|
| | | |
| Slattery, Daniel | Member | |
| Slattery, Daniel | Member | |

Other Committee Module Actions

- Listed on the 'Actions:' drop down menu.
- Actions can be done on everyone whose box has been checked on the left.

Actions:

| Display | Position | Member |
|--------------------------|----------|--------------|
| <input type="checkbox"/> | 03137468 | Brown, Alton |

Export to File
Print Roster
Send Email
Set End Date

Member Contact Information

- In order to protect our member's privacy, contact information cannot be changed directly on the Committee Module.
- If you have confirmed that someone's information is incorrect on the module, please feel free to email our Member Service Center at mssc@moaa.org.

Newest Update: Near Real Time Notification

As of **Aug. 1, 2019**, all Committee Module administrators now have access to retrieve reports on:

- 1) Brand-new MOAA members in the catchment area (Basic, Premium, or LIFE)
- 2) MOAA members who recently moved into the chapter's catchment area
- 3) Members in the area who recently opted in to receive chapter communications
- 4) **No Contact Report** – MOAA members who do not wish to be contacted by chapters

The report will only include names of members whose status changed as above from the previous month.

For example, the August Excel report will only have names only from July 1 through July 31, 2019. September's list will only have names from Aug. 1 through Aug. 31, 2019.

How to Access Near Real Time Notification

Go to the front page of the Committee Module. There will be a hyperlink marked **“Details for: Your Chapter Name”**. Select this link to get to the NRT notification.

MY PROFILE ROSTER

My Account My Groups Julie's Test Chapter

Details for: Julie's Test Chapter

Last Name: First Name: Email:
City: State/Province: Country:
Position: Current Future

Chapter Information Form
Add Chapter Member or Officer

Actions: Export to File Actual Chapter Member Count: 15

Displaying 1-20 of 28 View All |< < > >|

| <input type="checkbox"/> | Customer ID | Last/First Name | Position | Membership | Rank | Location | From/To | Contact Information | Voting Status | Status |
|--------------------------|-------------|-----------------|----------|------------|------|---------------------|------------|---------------------|---------------|--------|
| <input type="checkbox"/> | 05168845 | Statory, | 1st Vice | | LTC | 201 N Washington St | 10/22/2018 | daniel@moas.org | Voting | Active |

Monthly Recruiting List

After selecting the hyperlink, you'll be taken back to your Committee Profile page where you'll see **“REPORTS”** again

REPORTS

No Contact Report

Monthly Recruiting List

After selecting the “Recruitment List” you'll be asked if you want to open or save the file.

What do you want to do with SemiAnnual.xls?
From: 216.33.126.224

You can open the file or save it to your computer's hard drive. We recommend opening it to review, then saving it to your hard drive, saving it as month/day/year so that you can keep track of the members you're contacting for this month.

Monthly Recruiting List Column Headings

- There are **NO** changes for chapter (Alias) for May2019
 - The report will display this along the top of your Excel file if your chapter does not receive any new recruits/updates for the month.

Change Type:

- Accept Chapter Email
- Address Changed
- New MOAA Member
- **Unsubscribe Link:**
- UnsubscribeLink

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | AA | AB |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|----|----|
| | there are NO changes for chapter VAD4 for May2019 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Include the 'Unsubscribe Link' in Your Email to New Recruits

When crafting your email message to new recruits, you must include the "[unsubscribe link](#)" in your email message.

For example:

Dear Colonel Smith:

I hope this message finds you doing well. Our Julie's Test Chapter is looking forward to meeting you at our upcoming chapter meeting which will be held at the RoseCrest Country Club, Rosecroft Avenue, Iowa, on July 28th at 2:30pm. Please be sure to register your meal selections using this link:
<https://www.moaa.org/>

To unsubscribe from these notices please go to [moaa.org/email](https://www.moaa.org/email)

Sincerely,
Victoria Twyne
President, Julie's Test Chapter

The unsubscribe link allows recruits to "opt out" of receiving your email messages.

When MOAA receives opt out notices from members, this will be added to the "**No Contact Report**" on the following month when you log into the Committee Module.

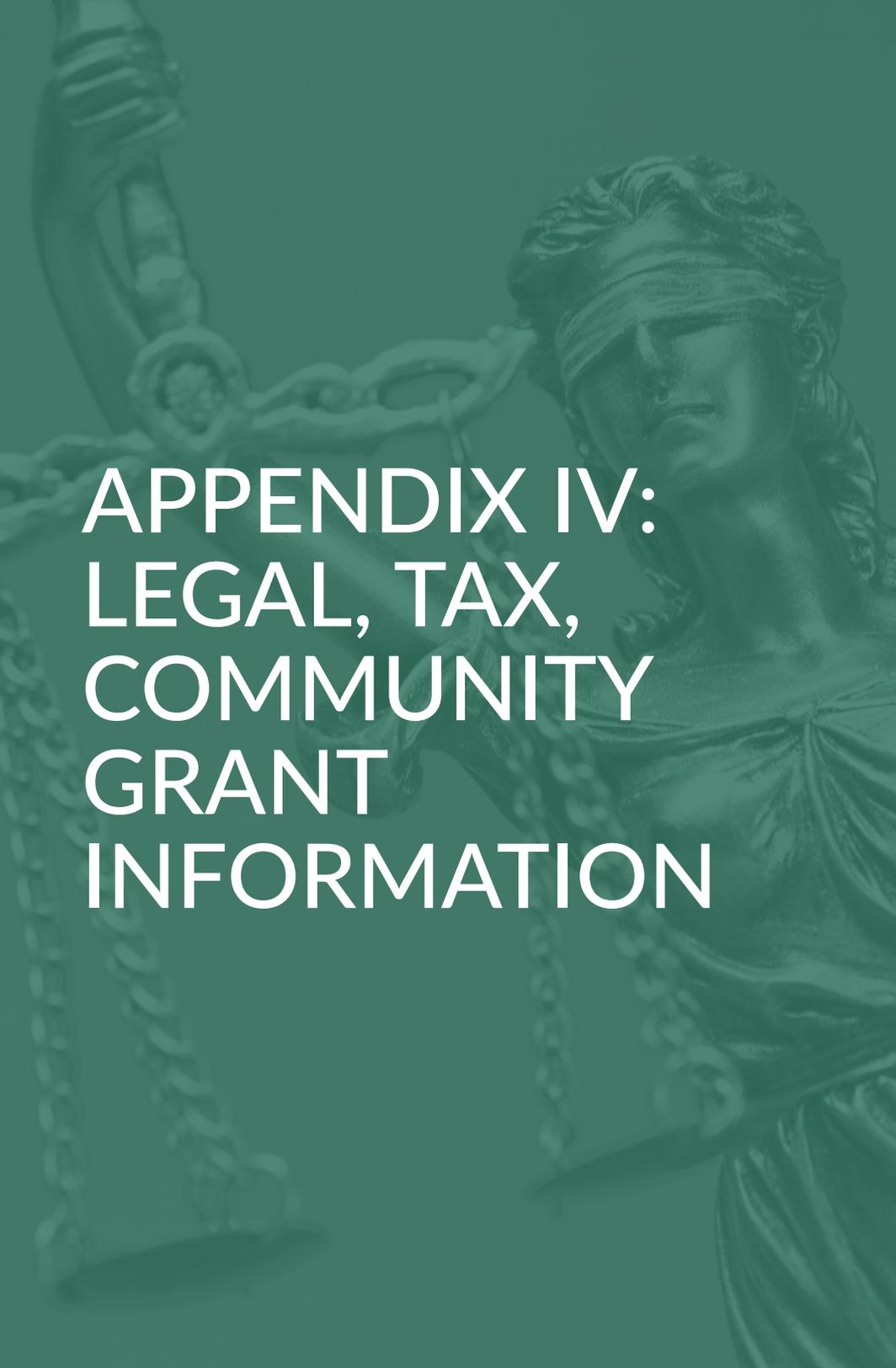
The unsubscribe link is included on the Excel report in the last column for anyone who has opted in to receive chapter emails/communications.

Use of MOAA Email Addresses

- These email addresses are provided by national MOAA exclusively for use by the chapter in official chapter communications for the purpose of recruiting new members. Any use of the addresses provided is governed by the following restrictions.
 - The email addresses provided by national MOAA **may only be used for official chapter communications** inviting the addressees to join the chapter, attend chapter events, or participate in chapter activities.
 - **No more than three email messages may be sent to any addressee during a single calendar year.**
 - **The email list may not be shared** with any other organization or individual without the advance written authorization of the Director, Council and Chapter Affairs.
 - Any files containing MOAA-provided email addresses will be **maintained in a secure manner**, password-protected and accessible only by authorized chapter officers.
 - Once an individual joins the chapter and becomes a chapter member, their email address may be added to the chapter's membership records and normal chapter correspondence from that date forward may occur. However, in today's environment it is prudent for chapter leadership to routinely take the appropriate steps to ensure the security and safe guarding of all members sensitive personal information.

Other Helpful Resources

- Committee Module Instructional Guide
- Near Real Time Notification Guide
- chapters@moaa.org
- Member Service Center at (800) 234-6622



**APPENDIX IV:
LEGAL, TAX,
COMMUNITY
GRANT
INFORMATION**

Legal Tidbits for Effective Council & Chapter Management

References

- *MOAA Council and Chapter Policies and Procedures Guide*
- *Association Law Handbook*

Incorporation

- Chapters are affiliated with national MOAA but are separate legal entities. They need to obtain their own Employer ID number (EIN) from the IRS and seek their own IRS determination of tax-exempt status.
- MOAA recommends every chapter become incorporated as a nonprofit organization.
- Incorporation protects chapter officers and members from personal liability for chapter obligations.
- A chapter's articles of incorporation, which set forth the chapter's purpose, are separate from its bylaws, but the two documents should be consistent with one another.

Liability Insurance

- Every chapter is encouraged to obtain liability coverage to protect it from lawsuits resulting from bodily injury and property damage at chapter-sponsored activities.
- The decision to obtain liability insurance is best approached through the concept of risk management
 - Identifying a chapter's risks starts by considering what chapter activities could result in a claim.
 - Securing competitive bids is advisable and should include an analysis of coverage, rather than focusing on price alone.

Checking Accounts

- Chapters should have an independent chapter checking account.
- Authority to sign checks and any qualifications to that authority should be clarified by the chapter's board of directors.
- Chapters should establish an electronic funds transfer account with MOAA headquarters to facilitate disbursement of earned monetary incentives and awards.

Council - Chapter Relationship

- There is no relationship similar to a military chain of command between a council and its member chapters.
- All chapters are strongly encouraged to join their state council and keep their state council president informed of significant chapter events and visits by MOAA national officers.

Income Tax Considerations

- MOAA recommends every chapter seek exemption from federal corporate income taxes.
- Chapters should seek recognition of exemption under the IRS Code Section 501(c)(19) as a veterans' organization.
 - To qualify, at least 75 percent of its members must be past or present members of the U.S. armed forces.
- A chapter with tax-exempt status and normal gross receipts of \$50,000 or less annually is not required to file a federal tax return (IRS Form 990)
 - A chapter with less than \$50,000 in gross receipts may be required to file an IRS Form 990N, which includes evidence of continued qualification for its tax exemption.

501(c)(19) vs. 501(c)(3)

| 501(c)(19) | 501(c)(3) |
|--|---|
| Mission: Authorized to lobby state or federal officials on public policy, in addition to other charitable, educational, and community welfare activities | Mission: Engage in charitable, educational, and community welfare activities. Lobbying activities restricted. |
| Tax Status: Organization exempt from federal taxation | Tax Status: Organization exempt from federal taxation |
| Source of Income: Primarily dues | Source of Income: Primarily donations from the public or from members |
| Payments/Donations: Not deductible to the donor (in most cases) | Payments/Donations: Tax deductible to the donor |
| IRS Requirements: To be granted exempt status, no less than 75% of members must be veterans of U.S. armed forces | IRS Requirements: To be granted exempt status, 1/3 of revenue must come from public donations |

Need more information?

Contact MOAA's Senior Program Director of Council and Chapter Affairs,
CAPT Erin Stone, JAGC, USN (Ret.)
at (703) 838-8108 or via email at ErinS@moaa.org

FAQs on the MOAA Foundation Community Outreach Grant Program

When can we apply for a grant, and how do we apply?

The online grant application period opens Dec. 1, 2021, and closes Feb. 28, 2022. Apply at www.moaa.org/foundation. Just click on the “Grants” tab to read the grant criteria to apply online.

What kinds of programs will a grant support?

- Housing
- Employment
- Family Strength
- Financial Assistance
- Transportation
- Food Assistance
- Health (Including Behavioral Health)
- Community Reintegration
- Legal Assistance

How much will the grant be for?

The maximum award for a grant is \$5,000 per chapter.

Are all councils/chapters eligible?

Absolutely. Any council or chapter may apply.

Can we use grant money to pay for the gold-bar program or the ROTC/JROTC medals program?

No, grant funds may only be used for programs benefitting military and veteran families of all ranks and their survivors. MOAA Foundation grant funding may not be used for MOAA member-only or member-recruitment programs.

Do we have to be a 501(c)(3) nonprofit to get a grant?

No, any MOAA entity may receive a grant, but they must be actively involved in the program supported by the grant, and they must have authority over how the funds are spent.

We have [their suggested local program]. Can we apply for a grant to support that program?

We encourage you to apply for a grant for any program you feel supports military families in your community, however it must comply with the grant criteria.

Can the council apply for a large grant and disburse sub-grants using the council's own criteria?

No, sub-grants by MOAA councils are not permitted.

Who can I call at MOAA national to discuss more details about the program?

If you have additional questions, feel free to call Amanda Centers, MOAA VP of Development, at (703) 838-8115 or send her an email at AmandaC@moaa.org.

MOAA Council & Chapter Affairs



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MOAA Member Service Center

1(800) 234-MOAA (6622)

Monday – Friday, 8 am - 6 pm Eastern Time

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