

# LEADERS RESOURCE MANUAL

MOAA Affiliated Councils and Chapters



# MOAA®

## NEVER STOP SERVING

### 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 Affiliated Councils & Chapters Leaders Resource Manual

## INTRODUCTION

Thank you for stepping up to lead a MOAA council or chapter. 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, rather it's a resource to assist with addressing the critical challenges MOAA's affiliate network faces.

For more detailed resources, refer to the *Council and Chapter Policies and Procedures Guide*, which you can find on [www.moaa.org](http://www.moaa.org). Please also familiarize yourself with the Councils and Chapters pages of the website.

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# MOAA OVERVIEW



## ABOUT MOAA

The Military Officers Association of America (MOAA) is congressionally chartered and organized under IRS Code, section 501(c)(19), as a tax-exempt veterans' organization. Accordingly, 75% of our members must be past or present members of the U.S. armed forces.

Our more than 350,000 national members are drawn from the commissioned ranks of the eight uniformed services: Army, Marine Corps, Navy, Air Force, Coast Guard, Space Force, the Commissioned Corps of the Public Health Service, and the Commissioned Corps of National Oceanographic Atmospheric Administration and their surviving spouses.

MOAA's nationwide network of councils and chapters are chartered by our national board of directors and support the national association through advocacy engagement at the federal, state, and local levels; membership growth; and representing the national association in their

local communities. MOAA's council and chapter network also includes virtual chapters, which exist to connect national members by interest and affinity rather than geographic location. Learn more about virtual chapters at [www.moaa.org/virtual-chapter](http://www.moaa.org/virtual-chapter).

MOAA's headquarters' team is organized under eight vice presidents, each reporting to the president and CEO through the chief operating officer.

## The major headquarters' departments include:

- Chapter/Council and Member Support
- Communications
- Development, including The MOAA Foundation and the MOAA Scholarship Fund
- Finance
- Government Relations
- Human Resources
- Information Technology
- Membership and Marketing

## CURRENT CHALLENGES

The national board of directors reviews and approves MOAA's Strategic Plan on a regular basis.

From overarching guidance in the Strategic Plan, the president and CEO developed the association's top challenges.

## These challenges are:

- MOAA's Long-term Financial Stability – one of our most important priorities to maintain the long-term strength of the association
- Stability of The MOAA Foundation – whose mission is to prevent and protect veterans from all ranks and their families from crisis
- Sustaining and Increasing MOAA Membership –



## STRATEGIC PLAN ONLINE

Visit [www.moaa.org/about](http://www.moaa.org/about) to download MOAA's Strategic Plan as well as access other key resources such as the Stakeholder's Report, the association's annual report to the membership.

with an emphasis on paid membership

- Chapter System Viability – stabilizing chapter membership and growing at a 1% annual rate
- Strengthening MOAA's Brand and Reach – maximizing MOAA's community engagement is essential to meet advocacy, revenue, membership, and philanthropic goals
- Maintaining Key Advocacy Positions and Mission Focus – key earned benefits in health care and compensation are continually under budget pressure and are essential to maintaining the viability of the all-volunteer force

### **The president and CEO has tasked the leadership team to focus on these day-to-day priorities:**

- Prepare to execute MOAA's October 2025 TotalForce+ conference, which will flip the script from the annual weapons system-centric national conferences and focus on the people essential to maintaining the effectiveness of the all-volunteer force. MOAA's TotalForce+ conference promises to positively impact four of MOAA's six challenges: long-term financial stability, sustaining and increasing MOAA membership, strengthening MOAA's brand and reach, and maintaining key advocacy positions.
- Launch the new association management system and begin using data as a strategic asset.
- Formalize a younger cohort membership strategy.
- Expand The MOAA Foundation's donation and revenue generation capabilities.
- Formalize the advocacy strategy in the association's key areas of focus.

## DATES OF INTEREST

January	Winter board of directors meeting
	Virtual meeting and/or travel stipend paid to councils on request
	AMBA and MOAA Vacations advertising program opens
February	Levels of Excellence, Communications, Strobridge, and Surviving Spouse Liaison awards deadline
	Council and independent chapter presidents' virtual meeting
	MOAA's birthday (Feb. 23)
	Community Outreach Chapter Grant deadline (Feb. 28)
March	MOAA Scholarship Fund application deadline (March 1)
	Virtual council and chapter leaders' workshop
April	Spring board of directors meeting
	Advocacy in Action (AiA) campaign
	Council Presidents' Seminar, in conjunction with AiA
May	Regional council and chapter leaders' workshop (location varies)
	AMBA and MOAA Vacations advertising program ends
	Annual Charities Golf Classic
June	
July	Summer board of directors meeting
August	Council and independent chapter presidents' virtual meeting
	Virtual council and chapter leaders' workshop
September	Fall networking and hiring event
October	Fall board of directors meeting
	Inaugural TotalForce+ conference
November	Council and independent chapter presidents' virtual meeting
	Regional council and chapter leaders' workshop (location varies)
	Scholarship Fund application period opens
December	Community Outreach Chapter Grant application period opens
	Community outreach sponsorship application window opens

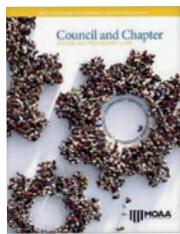
## POINTS OF CONTACT

As volunteer leaders in our association, the entire headquarters' team is focused on supporting you and your chapter members — our most engaged and active members.

Please reach out for information and support to these key points of contact:

General member service, account updates, committee module assistance, death notification, subscriptions to MOAA's electronic newsletters, and connections to specific MOAA departments	(800) 234-MOAA (6622) or <a href="mailto:msc@moaa.org">msc@moaa.org</a>
Benefits and financial information	<a href="mailto:beninfo@moaa.org">beninfo@moaa.org</a>
Career transition support and assistance	<a href="mailto:transition@moaa.org">transition@moaa.org</a>
Chapter leadership assistance	<a href="mailto:chapters@moaa.org">chapters@moaa.org</a>
Government relations and advocacy	<a href="mailto:legis@moaa.org">legis@moaa.org</a>
Media assistance	<a href="mailto:pr@moaa.org">pr@moaa.org</a>
MOAA Scholarship Fund	<a href="mailto:charities@moaa.org">charities@moaa.org</a>
Publications	<a href="http://www.moaa.org/publications">www.moaa.org/publications</a>
Spouse programs	<a href="mailto:moaaspouse@moaa.org">moaaspouse@moaa.org</a>
The MOAA Foundation and Community Outreach Chapter Grants	<a href="mailto:charities@moaa.org">charities@moaa.org</a>
VA disability claim information	<a href="mailto:vso@moaa.org">vso@moaa.org</a>

# LEGAL CONSIDERATIONS



## POLICY GUIDE

Visit [www.moaa.org/policyguide](http://www.moaa.org/policyguide) to view the *Council and Chapter Policies and Procedures Guide* and find templates for articles of incorporation and bylaws.

## MOAA CHAPTERS: LEGAL STATUS

As affiliates of MOAA, councils and chapters are independent, self-governing, and self-supporting organizations. The MOAA charter authorizes councils and chapters to associate with MOAA and to use MOAA's name, logo, and tagline. However, councils and chapters and national MOAA are separate and distinct organizations. They are not agents or subsidiaries of national MOAA, and they are not covered by MOAA's IRS tax exemption or MOAA's liability insurance.

## MOAA RECOMMENDATION: INCORPORATE

Incorporation protects officers, directors, and members from personal liability in most instances. MOAA's *Council and Chapter Policies and Procedures Guide* provides useful templates for articles of incorporation and bylaws. The website for the secretary of state or State Corporation Commission for your state provides detailed instructions and forms to use to incorporate. Be sure to follow the procedures for non-stock corporations (Virginia) or nonprofit organizations (in your state).

## APPLYING FOR TAX-EXEMPT STATUS

Tax-exempt status depends primarily on your mission (lobbying and advocacy, scholarships, or community improvement) and your source of income (dues, event revenue, donations).

### Examples include:

- IRC 501(c)(19) – Veterans Organizations
- IRC 501(c)(4) – Social Welfare Organizations
- IRC 501(c)(3) – Religious, Charitable, or Scientific Organizations

Exempt status is granted/denied by the IRS after review of Articles of Incorporation or other organizational documentation. Review IRS Publication 557 for more detailed information.

The process for receiving tax-exempt status begins with the secretary of state or State Corporation Commission chartering the corporation, typically about a 10-day process.

### The steps to do this are:

- Checking availability of name
- Paying a reasonable fee (Virginia is \$100)
- Downloading forms from website and submitting them

The IRS determines the tax-exempt status, generally a 60- to 90-day process. Note that exempt status is retroactive.

### Those steps are:

- Filing the correct IRS Form
- Paying the filing fee of \$600 [\$275 for 501(c)(3) charities]
- Filing timely annual tax return (IRS Form 990-N)

## CHARITABLE SOLICITATIONS

A chapter's ability to solicit charitable contributions depends on three factors:

- tax exemption vs. tax deduction
- state registration requirements
- required annual renewals

Registration requirements and exemptions vary by state. "Crowdfunding" is generally considered a solicitation. You need to pay the state's filing fee, which varies. And note that online website solicitation might trigger out-of-state registration requirements.



## IRS PUBLICATIONS

Refer to these IRS publications for additional details:

- IRS Pub. 3386 – Tax Guide for Veterans' Organizations
- IRS Pub. 557 – Tax Exempt Status for Your Organization
- IRS Pub. 4221-PC – Compliance Guide for 501(c)(3) Public Charities



## LIABILITY INSURANCE OPTIONS

Scan the above QR code to find details about liability insurance plans for MOAA chapters.

## MOAA CHAPTERS: LIABILITY INSURANCE

Bad things can happen — traffic accidents, food poisoning, alcohol-related injuries, personal data stolen or compromised, contractual indemnification — and your homeowner's 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, and litigation is expensive — at least \$30,000 to \$50,000, even for a frivolous claim.

## SECURE CHAPTER/COUNCIL LIABILITY INSURANCE

Council and chapter insurance is available through MOAA's insurance administrator, AMBA, with up to \$2 million in commercial general liability coverage. This provides coverage for legal fees even if the suit lacks merit. Lockton Affinity is another MOAA partner that chapters can utilize. The annual cost varies depending on the size of the chapter. Chapter leaders are encouraged to explore local options for competitive rates.

## ISSUES WITH CHAPTER NEWSLETTERS AND WEBSITES

Remember your newsletter/website represents MOAA. It's imperative to avoid divisive social issues, partisan political issues, and copyrighted material. In addition, newsletters and websites should not include military service seals and symbols. DoD/service branches own trademark rights on most military service seals and symbols. Avoid incorporating them in the header, title, or chapter name. Prior permission is required but is not normally granted.

Chapters are authorized to use MOAA seals and symbols, which are available for download at

[www.moaa.org/logos](http://www.moaa.org/logos). Additionally, MOAA will create a logo for the chapter to maintain brand integrity.

## COPYRIGHT GUIDANCE

News and media outlets have become very aggressive in searching out unauthorized use of their copyrighted material. Copyright violations are expensive and can severely damage a chapter's financial viability.

### To avoid violations:

- Do not publish photographs or material randomly found on the internet without written permission of the originator or a license, and
- Do not use material published in *Military Officer* magazine or on the MOAA website without explicit permission from MOAA's vice president of Communications.

Find more detailed copyright guidance on page 45.

# MEMBERSHIP & MARKETING UPDATE



## TODAY'S ENVIRONMENT

Membership remains a top strategic priority for the organization. The stronger our membership, the more we can accomplish on behalf of the uniformed services community. As we work to grow overall membership and recruit younger members, we face a number of challenges:

- Attitude toward membership differs by generation
- Varying degrees of awareness of MOAA within the military community
- Declining Premium and Life membership
- Aging membership
- Limited engagement in association activities and offerings

With these challenges comes the opportunity to test new approaches, new messaging, and new offerings. We rely heavily on what the data tells us, and as a result, our membership strategy evolves and grows stronger.

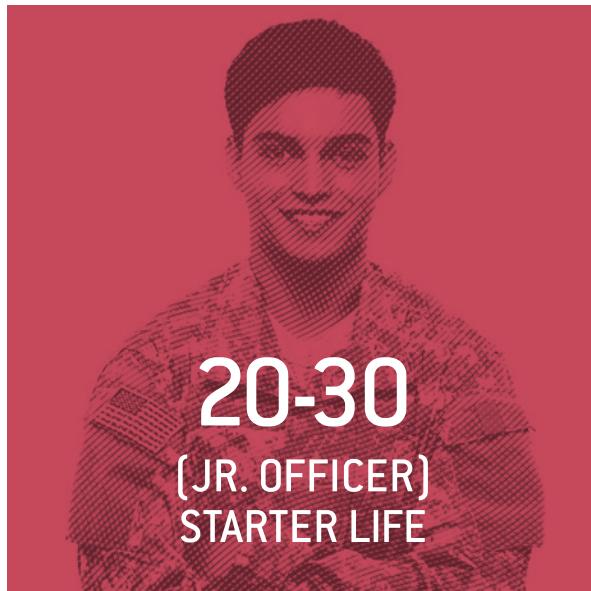
Today, MOAA stands strong at 350,000 members. Basic membership, which continues to grow, is an introductory, no-cost electronic membership designed to educate younger officers about membership value. The Basic membership category allows us to build a relationship with these officers and begin to engage them in ways that ultimately lead them to Premium and Life membership.

Premium and Life membership represent our dues paying members. We are working to reverse the downward trend in paid membership. Renewal rates of our Premium members remain stable; however, acquisition of new Premium members is lagging. The best source for new Premium members is the Basic membership category, which services as a strong pipeline for paid membership.

## MOTIVATORS FOR MEMBERSHIP

To be successful in growing membership, we must demonstrate how MOAA's value is relevant to an individual's life. In today's highly personalized world, using a one-size-fits-all approach to recruit and retain members is not an option. We must speak to the individual. To help you consider messaging for various groups, please refer to the MOAA member personas that highlight key attributes about each group, suggested messaging, and relevant products. Be sure to add in relevant chapter benefits and events, too.

## MEMBER PERSONAS



**20-30  
(JR. OFFICER)  
STARTER LIFE**

### **Message:**

MOAA never stops serving to get their lives off to a great start.

### **Markers:**

Exciting "firsts" (marriage, baby, house), deployment, strains of war, high divorce rate, one tour of duty/forced out due to drawdowns, questioning military life as a career, wired, media savvy, proactive, activists

### **MOAA Provides:**

- Military professionalism
- Transition services such as résumé reviews and virtual job fair
- Financial guidance and products



**31-45  
(MID-GRADE OFFICER)  
FAMILY LIFE**

### **Message:**

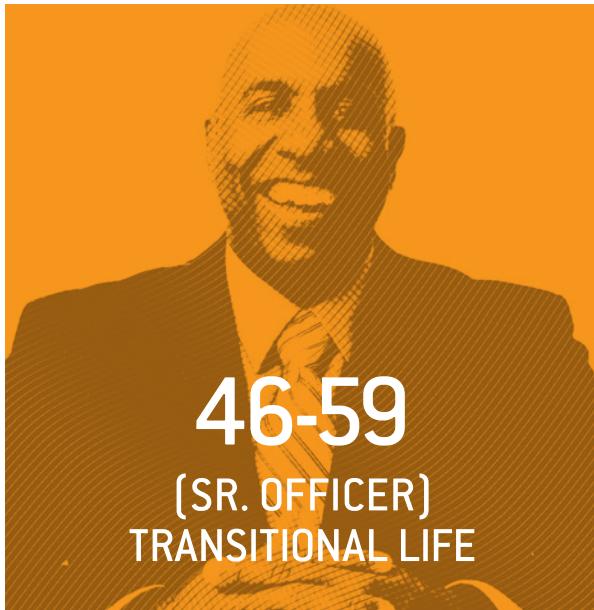
MOAA never stops serving to help meet the needs of their family.

### **Markers:**

Pragmatic, skeptical, more earning potential, "trading up" homes, saving (or not saving) for college and retirement, "sandwich generation," possibly more deployment, injury, career instability or dissatisfaction, divorce, geo-bachelors, wired, possibly transitioning out of active duty to service in the National Guard or Reserve

### **MOAA Provides:**

- Military professionalism
- Professional and personal coaching
- Transition services, including spouse programs
- Life insurance
- Guidance on using civilian insurance



**Message:**

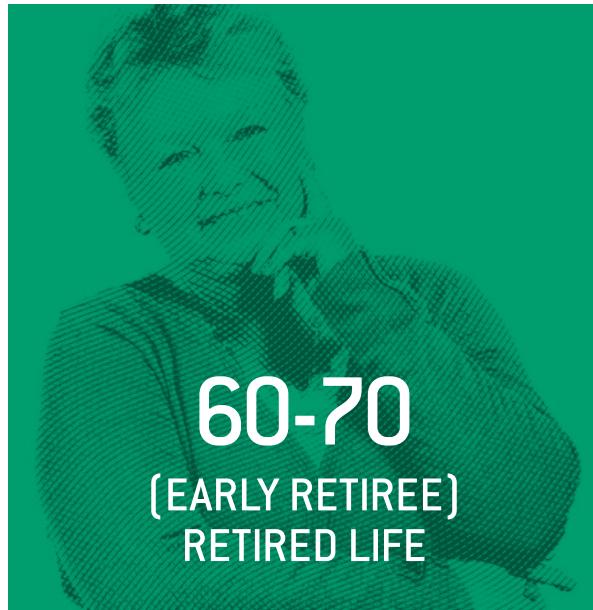
MOAA never stops serving to help them refocus and thrive.

**Markers:**

Second and non-military careers, reinventing themselves, mind/body wellness-focused, retirement concerns, benefits eroding, spouse in workforce

**MOAA Provides:**

- Transition services, including financial/benefits guidance
- Professional and personal coaching
- MOAA lifestyle and life event publications
- Advocacy against retirement threats
- Access to a strong network of fellow officers, spouses, and surviving spouses via local and virtual chapters
- MediPlus TRICARE supplement and insurance



**Message:**

MOAA never stops serving to help them retire the way they envisioned.

**Markers:**

Original activists, idealistic, retiring later, stretching savings, downsizing, increasingly wired, illness prevention, caring for elderly parents

**MOAA Provides:**

- Travel services
- Professional and personal coaching
- MOAA lifestyle and life event publications
- Health care guidance, TRICARE to Medicare
- Health care advocacy
- Wealth planning
- Access to a strong network of fellow officers, spouses, and surviving spouses via local and virtual chapters



**Message:**

MOAA never stops serving to honor their service and keep them connected to their military family.

**Markers:**

Patriotic, fond memories, spouses/friends dying, depression, isolation, chronic health concerns, financial difficulties (especially among surviving spouses)

**MOAA Provides:**

- Access to grassroots advocacy efforts
- Access to a strong network of fellow officers, spouses, and surviving spouses via local and virtual chapters
- Publications
- Support for spouses and families who have lost an officer



**Message:**

MOAA never stops serving to honor their steadfast commitment.

**Markers:**

Uncertainty and fear about what's next in term of spouse's assignments and potential deployment; difficulty putting down roots in a community; different schools and routines for children; careers often put on hold; sacrifices made to support spouse; financial matters fall on their shoulders. In essence, spouses are serving the military alongside their servicemembers and want to be viewed and respected for their tremendous and selfless efforts.

**MOAA provides:**

- Advocacy to support military families
- Publications: *State Report Card* and *Military Family Legislative Action Guide*
- MOAA insurance plans
- *Military Spouse Employment Guide*, made possible by The MOAA Foundation



**Message:**

MOAA never stops serving to honor their steadfast commitment.

**Markers:**

For older spouses, dwindling support system and burdened or confused by tasks they have never had to deal with, like financial matters. In essence, surviving spouses served the military alongside their servicemembers and want to be viewed and respected for their tremendous and selfless efforts.

**MOAA Provides:**

- Advocacy to support surviving spouses
- Publications: *Survivor's Checklist* and *Military Officer* magazine
- Travel discounts
- MOAA insurance plans
- Community and camaraderie through local chapters



**Message:**

MOAA never stops serving well beyond their military career.

**Markers:**

Have left the military for various reasons: spouse may desire a more stable living environment; officer may have developed negative views of the military; may want to reconnect with family and friends; may have served out a planned amount of time. Interested in the products and services MOAA provides, but less interested in legislation and lobbying efforts as they don't directly apply

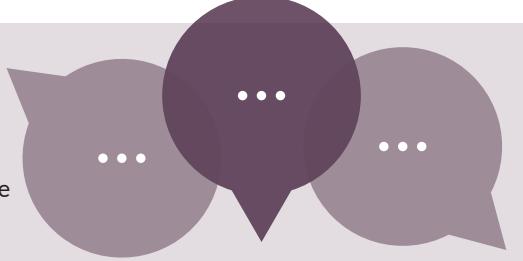
**MOAA Provides:**

- Advocacy
- GI bill training improvements; you have 10 years to use the GI bill
- Professional and personal coaching
- Career transition services
- Financial guidance
- Travel discounts
- Community and camaraderie through local chapters

### SHARING MOAA'S MESSAGE

Recent research suggests the following messaging may resonate with our current and prospective members:

<b>What to Say</b> <ul style="list-style-type: none"> <li>• Legislative wins that MOAA has accomplished</li> <li>• Benefits that MOAA membership can attain for families and spouses of members</li> <li>• MOAA expertise and accomplishments related to officer compensation and insurance</li> </ul>	<b>How to Say It</b> <ul style="list-style-type: none"> <li>• WE FIGHT FOR YOU – language that stands up and fights for members, paired with proven wins and accomplishments</li> <li>• WE SERVE YOU AND YOUR LOVED ONES – Serving for members and their families and loved ones, with membership benefits for a low cost</li> </ul>	<b>Where to Say It</b> <ul style="list-style-type: none"> <li>• Digitally for younger groups; mail/print for older</li> <li>• At events where MOAA can grow membership (webinars, community service events)</li> <li>• At events where MOAA can interact with families (social, family-friendly events)</li> <li>• Shorter events, especially for veterans and older groups.</li> </ul>
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### INVITE OTHERS TO JOIN MOAA

Encourage prospective members to use promotion code GRASSROOTS.

They'll get 10% off Premium or Life membership dues when they do.

### WORKING TOGETHER

Grassroots activities at the local level amplify the membership development efforts taking place at the national level. When we work together toward our goal of membership, we're more likely to recognize success.

#### How you can help:

- Ask questions: The national staff is available to provide guidance and advice.
- Share the value of membership with your fellow officers and surviving spouses: It's easy to bring MOAA up in conversation. Don't be afraid to share your story about how MOAA benefits you.

### VALUE IN MEMBERSHIP

	BASIC	PREMIUM	LIFE
Legislative News Updates and Advocacy Efforts	✓	✓	✓
MOAA Newsletters	✓	✓	✓
Council and Chapter Membership and Involvement	✓	✓	✓
MOAA Insurance Plans	✓	✓	✓
Exclusive Discounts on Products, Services, and Travel	✓	✓	✓
Access to Member Books and Guides		✓	✓
Financial Education and Consumer Advice		✓	✓
Educational Resources for Your Children		✓	✓
Expert Advice on Military Pay and Benefits		✓	✓
Career Transition Resources		✓	✓
Subscription to <i>Military Officer</i> and Exclusive Publications		✓	✓
Spouse Protection			✓
Access to 200 clubs worldwide with membership in the Army and Navy Club of Washington, D.C., with significantly reduced initiation fee			✓

# LEGISLATIVE UPDATE



## LEGISLATIVE SUCCESS

Visit [www.moaa.org/moaa-in-action](http://www.moaa.org/moaa-in-action) to review MOAA's advocacy accomplishments.

## ADVOCACY

How do you, MOAA council and chapter leaders, make a difference? There are many examples, such as defeating "COLA Minus 1 Percent" (language passed in a late-2013 continuing resolution that would have cut any cost-of-living adjustment for military retirees by 1%) and repealing the Survivor Benefit Plan-Dependency and Indemnity Compensation offset ("widows tax") in 2019. Other recent victories include DoD's reversal of planned medical billet cuts in the Military Health System and the Honoring Our Pact Act, the largest toxic exposure bill in decades.

It was because of YOU we were able to get these bills passed. You wrote, called, and emailed your members of Congress, and they heard MOAA's powerful voice.

There is so much power in numbers. We cannot emphasize enough how important your voice is to our national legislative advocacy efforts — and your relationships "at home" with your lawmakers and their staff translate to success on Capitol Hill. Members of Congress have a better idea of who MOAA is when they get to know you.

## MEET THE MOAA ADVOCACY TEAM



**Maj. Gen. April Vogel,  
USAF (Ret)**  
Vice President  
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(703) 838-8103



**CDR René Campos,  
USN (Ret)**  
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VA Health Care  
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**Karen Ruedisueli**  
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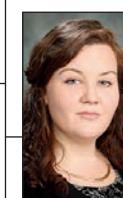
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**Terry Waters**  
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## FEDERAL-LEVEL ADVOCACY GOALS

The following is an overview of the association's advocacy goals, broken into six categories.

### Active Duty:

- Maintain a pay raise at or above Employment Cost Index and programs necessary to recruit and retain a quality force.
- Ensure pay continues for all eight uniformed services during government shutdown.
- Restore Basic Allowance for Housing at 100% of housing costs per military housing area.
- Ensure barracks are a safe and healthy place to live, verified by the chain of command and government-owned work centers.
- Codify procedures and authorities to increase out-of-cycle housing allowances to address emergencies such as reduced availability of housing and significant fluctuations in utility costs.

### Families:

- Address TRICARE Young Adult parity issue by extending eligibility to dependents up to age 26 with no separate premium to bring TRICARE on par with commercial health plans.
- Improve congressional support for uniformed services families. Enhance programs to support spouse employment, ensure implementation of an effective Basic Needs Allowance, and provide accessible, affordable child care options.
- Improve access to care through greater TRICARE plan flexibility, increased congressional oversight of TRICARE networks, and a digital system for access problem reporting and assistance.

### Guard and Reserve:

- Continue to pursue reserve-component priorities and improvements, and coordinate with Guard and Reserve leadership to advance legislative and

policy solutions to meet servicemember and force readiness requirements.

- Secure TRICARE coverage for reserve-component servicemembers to maintain readiness.
- Overcome delayed pay for Guard and Reserve when promoted and when retired.

### Retirees:

- Provide concurrent receipt of military retirement pay and VA disability pay.
- Maintain the hold on medical billet reductions until required reports clarify how any cuts will fully support both readiness and beneficiary access to care.
- Reverse degradation of pharmacy benefit — specifically, ensure access, and achieve limits to copay increases.
- Improve access to care through greater TRICARE plan flexibility, increased congressional oversight of TRICARE networks, and a digital system for access problem reporting and assistance.

### Survivors:

- Repeal the recoupment of a retiree's paycheck for the month after their passing.
- Continue to improve SGLI/VGLI updates to match inflation.
- Improve Dependency and Indemnity Compensation baseline to align with other federal government entitlements baselined at 55%.

### Veterans:

- Support a Veterans Benefits Administration that is effective and transparent for veterans and their families and survivors.
- Compel Congress and the VA to accelerate care-giving and whole health care services, as well as modernization of the Veterans Health Administration workforce and facility infrastructure to improve veterans' access to quality care.



#### LEARN MORE

Go to [www.moaa.org/legisleaders](http://www.moaa.org/legisleaders) for more information about Advocacy in Action.

### NATIONAL AND COUNCIL/CHAPTER COLLABORATION

Each year, council and chapter leaders from across the U.S. join national MOAA leaders and staff for Advocacy in Action to visit the offices of lawmakers on Capitol Hill to discuss key legislative priorities.

Members can continue to take part in grassroots efforts to support these topics and others by registering today to use MOAA's Legislative Action Center, [www.moaa.org/takeaction](http://www.moaa.org/takeaction), an easy way for all members and supporters to connect with their lawmakers.

To learn more about Advocacy in Action, visit [www.moaa.org/legisleaders](http://www.moaa.org/legisleaders). There, you can access advocacy resources and other important information to help guide your conversations with your lawmakers.

In addition to this in-person event, national MOAA offers a number of resources to help council and chapter leaders stay informed and up to date on advocacy efforts and take action on key issues throughout the year.

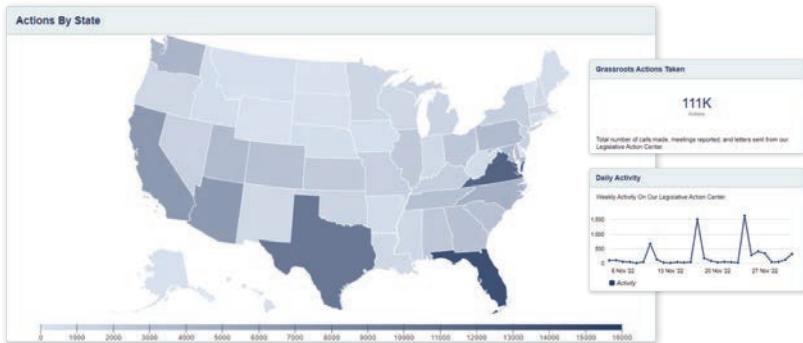
- **State Report Card.** This map assesses each state on the taxability of military retired pay and survivor benefits. Visit [www.moaa.org/statereportcard](http://www.moaa.org/statereportcard) to view.
- **State Legislative Exchange Forum.** This online forum allows council and chapter legislative leaders to share their experiences on issues at the state level.

#### • Points of Contact:

**Lt. Col. Don Wolfinger, USA (Ret)**  
Greater St. Louis Chapter/Missouri  
Council of Chapters, Legislative Affairs  
Email: [don17609@yahoo.com](mailto:don17609@yahoo.com)  
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**Lt. Col. Shelly Kalkowski, USAF (Ret)**  
Chair, State Legislative Committee Colorado  
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Phone: (970) 337-1193

**Col. Harold Cooney, USA (Ret)**  
Past President, Pennsylvania Council of Chapters  
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Phone: (610) 442-5880



## LEARN MORE

Go to [www.moaa.org/legis](http://www.moaa.org/legis) leaders for the Legislative Leaders page.

- **Legislative Leaders Page.** This is an enduring resource for council and chapter leadership to provide necessary tools for your federal advocacy efforts, including federal advocacy resources, Advocacy in Action materials, and state advocacy resources.
- **MOAA's Legislative Action Center.** This online tool has four main sections:
  - **Key Advocacy Issues:** Learn more about MOAA's core mission and the more specific population groups the organization advocates for on Capitol Hill.
  - **Engage With Lawmakers:** Developing professional relationships with your elected officials is huge force-multiplier for MOAA's advocacy in Washington, D.C. If you meet with your legislators, we want to know about it.
  - **MOAA-Supported Legislation:** A comprehensive list of MOAA-supported legislation for the current session of Congress. MOAA regularly updates this list so you, our members, can know what legislation we have publicly endorsed.
  - **Find Your Elected Officials:** Not sure who your elected officials are? This tool will tell you exactly who your state's two senators are and who your district's representative is.



Visit [www.moaa.org/takeaction](http://www.moaa.org/takeaction) to access MOAA's Legislative Action Center.



## COUNCIL/CHAPTER ADVOCACY SELF-ASSESSMENT

Grassroots advocacy requires constant effort, and below are some best practices to assess the efficacy and effectiveness of your council or chapter:

- Direct line to lawmakers and primary staff leaders
- Brief lawmakers on national MOAA goals
- Write a letter to lawmakers
- Mass action on legislative action alerts
- Phone banking
- Office visits
- Host town halls
- Collect and share stories of the affected
- Local media contact
- Write an op-ed
- Information sessions
- Coordinate with local MSO/VSOs
- Recruit new advocates

## CAPITOL HILL TOLL-FREE HOTLINE

In addition to MOAA's Legislative Action Center, members can contact their lawmakers through MOAA's Capitol Hill toll-free hotline at (866) 272-6622.

# MOAA COMMUNICATIONS



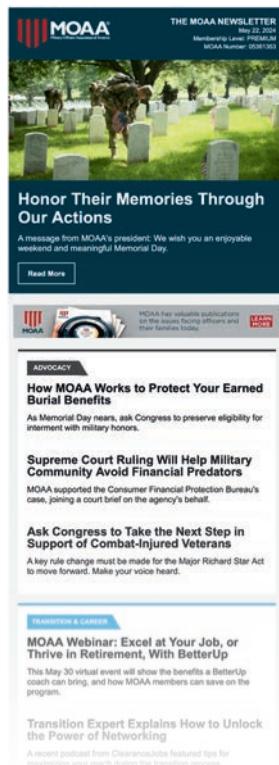
## SUBMIT YOUR NEWS

Send your story ideas and photos from your events to [editor@moaa.org](mailto:editor@moaa.org).

The Communications team at national MOAA is your resource as you look to engage with members, potential members, and supporters at the state and local level. They are here to provide guidance, suggestions, support, and resources to help you reach your key audiences as well as to help amplify and share the impactful work councils and chapters are doing in your community.

## MILITARY OFFICER MAGAZINE

Military Officer magazine is MOAA's primary communication channel with its members. Each month, the magazine highlights council and chapter programs and activities in addition to sharing stories about interesting members.



## THE MOAA NEWSLETTER

Every week, The MOAA Newsletter (TMN) shares timely stories and headlines on topics of interest to MOAA's key audiences. MOAA aims to include council and chapter information in all issues.

## SOCIAL MEDIA

National MOAA maintains and is active on Facebook, LinkedIn, X, Instagram, and YouTube. Our social media channels are the primary way we communicate breaking news and information as well as share the timely work of the councils and chapters.

### Social Media QR Codes



Facebook  
MOAA



Facebook  
MOAA Spouse



X  
MilitaryOfficer



X  
MOAAPrez



Instagram  
MOAAOfficial



Threads  
MOAAOfficial



LinkedIn  
MOAA



YouTube  
TheMOAACChannel

## FOLLOW MOAA

Make sure you are following or subscribed to MOAA on your personal social media channels.

Also make sure your council and chapter social media feeds are following MOAA.

If you need assistance on how to do that, contact MOAA at [amberm@moaa.org](mailto:amberm@moaa.org).



MOAA Photos

Galleries

MOAA Photos

2024-01-31 Quality of Life Panel...  
2024-03-05 Major Richard Star...  
2024-03-13 Veteran Affairs Testi...  
2024-04-17 Advocacy in Action  
2024-04-18 LoE and Harris Awar...  
2024 MOAA Charities Golf Clas...

2024-01-31 Quality of Life Panel...  
22 Files

2024-03-05 Major Richard Star Ac...  
40 Files

2024-03-13 Veteran Affairs Testi...  
27 Files

2024-04-17 Advocacy in Action  
70 Files

2024-04-18 LoE and Harris Awards  
31 Files

2024 MOAA Charities Golf Classic  
200 Files

MOAA Photos

Created  
13 May 2024

Modified  
13 May 2024

Military Officers Association of America

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## SERVICES

MOAA's Communications team provides additional services aimed at helping you develop and maintain successful and effective communications.



## MOAA PHOTO GALLERIES

Visit our gallery page to find and download MOAA images.



# REQUEST A LOGO

Email **chapters@moaa.org** to have a custom logo created for your chapter.

### These include:

- **Logos.** We can provide official MOAA-branded logos for your council or chapter.
- **Stories.** Each month, MOAA provides stories that you can use in your newsletter or on your website.
- **Photos.** MOAA makes available photos from its official events and activities that councils and chapters can use in their communications.
- **Training.** Through training sessions and workshops, MOAA's team keeps councils and chapters informed on key communications issues and topics.
- **Promotion.** If you have good stories or good photos, we are here to help you amplify that information.

For additional information on any of these services, contact [chapters@moaa.org](mailto:chapters@moaa.org).

## PHOTO USAGE GUIDELINES FOR COUNCILS AND CHAPTERS

Today, through technology tools, the owners of copyrighted images and graphics can scour the internet in search of unlicensed or unapproved use of their material. Councils and chapters need to be aware of this as violation of copyright law can cost thousands of dollars per incident. Before you use a photo, graphic, or image, reference the following:

- Q. Did I take this photo?
  - A. If yes, you can use the photo.
- Q. Did I hire a photographer to take this photo?
  - A. If yes, you can use the photo if you have explicit or contractual permission to do so.
- Q. Did I copy and paste this photo from a website?
  - A. Do not use the photo.
- Q. Did I download this photo from a website that doesn't have a usage policy?
  - A. Do not use the photo.
- Q. Did I download or copy this photo from MOAA?
  - A. Do not use unless you have permission from MOAA. Email [chapters@moaa.org](mailto:chapters@moaa.org).



## PHOTO USAGE TIP

Before using any photos, make sure you have permission or own the copyright.

## WHERE TO FIND PHOTOS

- Search online for “public domain photography,” and you’ll find an extensive list, with everything from AI-driven image search engines like picryl.com and pexels.com to public entities and institutions such as the Smithsonian, National Gallery of Art, and other museums that have moved portions of their collections into the public domain by applying a Creative Commons (CC) license to various works.
- Any material on Flickr.com marked with a CC license is fair game but might have some attribution rules. Flickr requires a user login. Its search function allows users to limit results to those with a CC license.
- Library of Congress: [www.loc.gov/free-to-use](http://www.loc.gov/free-to-use)
- Unsplash: <https://unsplash.com/license> (free-to-use repository of public domain images)
- Wikimedia: <https://commons.wikimedia.org>

## TIPS FOR TAKING GOOD PHOTOS

Visual imagery is a key component of telling a story and showing your audience what they missed by not being at your event. To ensure you capture the best images, follow these quick guidelines.

- Set your phone/camera to the highest picture resolution possible. Make sure the image is in focus.
- Strive to capture action, interactions, and naturally occurring imagery. Posed interactions are OK, but natural is better.
- Fill the frame with your subjects. Take a step closer rather than zooming in.
- Be aware of the background. Avoid framing your picture with a background item that might appear to come out of or sit on a subject’s head.
- If the room is too dark, use the phone’s flash but only when necessary. Using available light is preferable.



## MOAA COUNCIL AND CHAPTER COMMUNICATIONS CHECKLIST

- ✓ Follow national MOAA on social media.
- ✓ Sign up for council and chapter content in The MOAA Newsletter.
- ✓ Link to MOAA’s website from your council and/or chapter website.
- ✓ Send us your photos and story ideas at [editor@moaa.org](mailto:editor@moaa.org).
- ✓ Check your photos for copyright.

# MOAA CHARITIES

The MOAA Foundation and MOAA Scholarship Fund are independent charitable subsidiaries of MOAA. Both organizations serve members of the greater uniformed services community, regardless of rank or branch of service.

These charities were created to allow MOAA to deliver on our commitment to serve the entire military community philanthropically. MOAA members, chapters, and councils can trust that their investment in The MOAA Foundation and the Scholarship Fund makes a meaningful impact in the lives of servicemembers and their families across the country.

MOAA councils and chapters are encouraged to use our programs, share our resources, and donate to support our work.

Programs and services provided by The MOAA Foundation and MOAA Scholarship Fund are fueled by generous donations from individuals, support from corporate sponsors, and a network of resources provided by MOAA.

## THE MOAA FOUNDATION

Founded in 2014, The MOAA Foundation serves all members of the uniformed services community. Our mission is to provide critical support services that protect veterans who are facing crisis situations and provide award-winning resources and education that prevent servicemembers from experiencing crisis.

### Protection during crisis

- Through the Crisis Relief Program and the Community Outreach Program, the foundation works to provide veterans and active duty service-members and their families with critical financial support in times of crisis.

- The MOAA Foundation Crisis Relief Program provides emergency one-time grant funds to assist uniformed services personnel and veterans and their families in crisis situations. Priority is given to those experiencing crisis due to FEMA-declared disasters.

- Our application is open to currently serving servicemembers, veterans, and retirees and their families, including survivors. Unlike other relief programs, a VA rating is NOT required for this program, bridging the gap for over 12 million veterans who do not qualify for aid from other relief organizations.

- Applications take less than 20 minutes to complete, on average; 90% of applications are approved; and to date, 100% of applicants would recommend program to others in need.

- Through MOAA councils and chapters, the foundation is able to distribute Community Outreach Grants nationwide to fund grassroots projects and initiatives that support and benefit the greater military community. Past projects include programs that provide housing assistance, food distribution, back-to-school backpacks for low-income families, and much more. Interested MOAA councils and chapters should apply annually. The application window typically opens in December each year and closes at the end of February.

### Preventing crisis

- Crisis situations do not discriminate based on service affiliation; however, there are steps individuals can take to safeguard their families when disaster strikes. Through the Career Transition and Financial Education program, the foundation provides education webinars, resources, and support through our team of subject-matter experts.

## COMMUNITY OUTREACH GRANTS

Visit charities [.moaa.org/ community outreach](http://moaa.org/community/outreach) to learn more about the program.

- Additionally, we host events year-round to connect servicemembers who are transitioning to civilian employment and military spouses with employers who value military service and understand the demands of a military lifestyle.
- Webinar topics cover a broad range of topics aimed at providing support to military individuals and families at all stages of their careers. A few of our webinar topics include navigating TRICARE, understanding your GI bill, preparing your spouse for survivorship, and much more.



Through a Community Outreach Grant, the Grand Strand (S.C.) Chapter supports veterans facing homelessness.

## FAQS ON THE MOAA FOUNDATION COMMUNITY OUTREACH GRANT PROGRAM

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

The annual grant application period is from Dec. 1 until the end of February the following year. Apply at [charities.moaa.org/communityoutreach](http://charities.moaa.org/communityoutreach).

### What kinds of programs will a grant support?

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

### Are all councils/chapters eligible?

Absolutely. Any council or chapter may apply. Councils and chapters may also submit multiple applications if they are seeking funds for separate projects. Example: If you would like to fund a food bank AND distribute backpacks to families through two separate events, you may submit two separate applications.

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

No, grant funds may only be used for programs benefiting military and veteran families of all ranks and their survivors. The 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 [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 contact at national MOAA to discuss more details about the program?

If you have additional questions, email the Development team at [charities@moaa.org](mailto:charities@moaa.org).



## LEND YOUR SUPPORT

Learn more about how you and your chapter can help support The MOAA Foundation by emailing [charities@moaa.org](mailto:charities@moaa.org).

## THE MOAA SCHOLARSHIP FUND

Founded in 1948 with the belief that education is the cornerstone of a strong democracy, the MOAA Scholarship Fund provides financial assistance to children of both officers and enlisted personnel pursuing higher education. Recognizing that military children make enormous sacrifices while their parents serve, the scholarship fund eases some of the financial burden families face.

This assistance comes in the form of grants and interest-free loans that provide students and families with relief to help ease the financial burden of continuing education. Along with traditional colleges and universities, students attending vocational or technical schools are also eligible to receive funds.

### Interest-Free Loans Grants

Our interest-free loan repayment is a key part of the fund's longevity. By recycling funds, the MOAA Scholarship Fund will continue to serve military families for generations to come. Current students understand that their on-time payments allow future students to enjoy the same benefit of the interest free loan program.

### Grants

We also offer several grant programs to eligible students. Grants are made possible by generous donors who recognize the value of higher education. Grant programs include the Designated Scholar program, Senior grants, American Patriot, and the General John Paul Ratay Educational Fund grant.

Donors can establish their own designated scholar grant to correspond with a student currently receiving financial assistance.

# CHAPTER MANAGEMENT

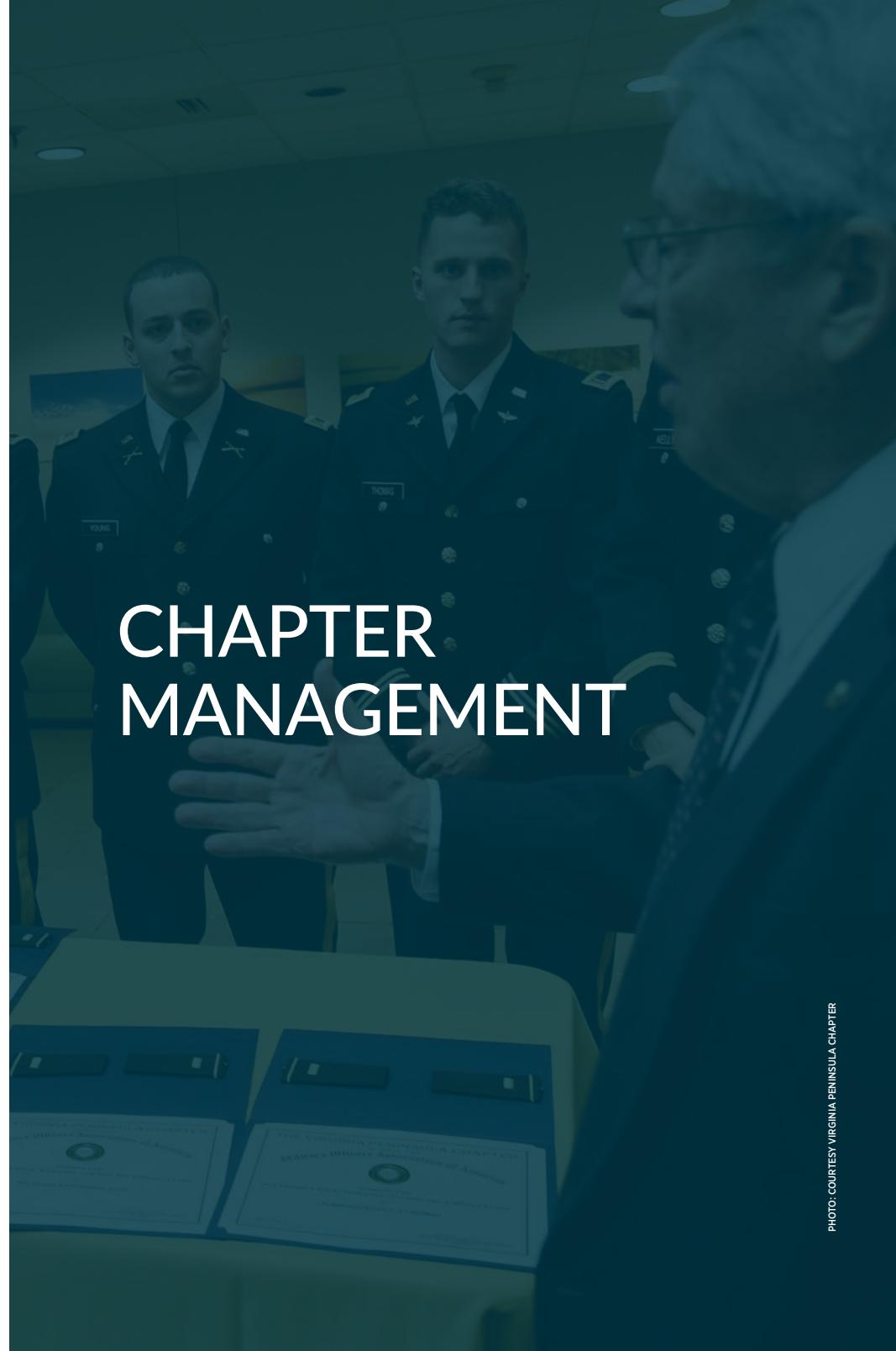
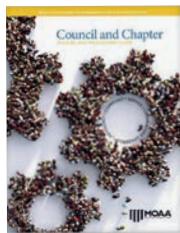


PHOTO: COURTESY VIRGINIA PENINSULA CHAPTER



## MANAGEMENT RESOURCE

The MOAA *Council and Chapter Policies and Procedures Guide*, available at [www.moaa.org/policyguide](http://www.moaa.org/policyguide), provides more detailed guidance on leading and managing a council or chapter.

MOAA's nationwide network of nearly 400 councils, chapters, satellite chapters, and virtual chapters represent one of the most engaged segments of MOAA's membership. We thank you, as volunteer leaders of these organizations, for your significant contributions to our association's success at the national, state, and local levels.

## AFFILIATED COUNCILS AND CHAPTERS TEAM

The Affiliated Councils and Chapters team is here to help you as you navigate your roles in leading this organization forward.



**Capt. Frank J. Michael, USN (Ret)**

Senior Director  
FrankM@moaa.org  
(703) 838-8108



**Dena Kilgore, CAE**  
Program Director  
DenaK@moaa.org  
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**Rachel Sanks**  
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Chapter Visitation and Awards  
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**Will Partain**  
Chapter Affairs Specialist  
Organizational Analysis  
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(703) 838-8168

## MOAA'S AFFILIATE MODEL

- **Chapters** are groups of officers connected by proximity (geographic chapters) or interest (virtual chapters).
- **Satellite chapters** are smaller groups that operate under the administration of a host chapter.
- **Councils** are statewide coalitions of three or more chapters.

Chapters are strongly encouraged to be engaged and active in their respective state council to fully realize all benefits of the MOAA affiliate system.

## COUNCIL EFFECTIVENESS

Council functions might include, but are not limited to:

- Represent the consensus of its member chapters.
- Help monitor and maintain a healthy affiliate system.
- Provide a forum for the exchange of ideas among chapters.
- Lead and coordinate state legislative matters in the interest of the military and veteran community.
- Provide support for national MOAA's legislative and other objectives.
- Visit chapters and participate in virtual meetings. National MOAA provides a stipend to support this outreach.

In states without a council, chapters are considered independent chapters and are looped into relevant national MOAA communications.

## CHAPTER EFFECTIVENESS

Several key factors contribute to chapter health:

- Having a clearly stated chapter purpose/mission statement
- Legislative advocacy and engagement
- Impactful community service

- Membership growth through recruitment and retention

**MOAA uses the following metrics to help assess chapter health:**

- 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 participation and collaboration

**NEW LEADER'S CHECKLIST**

Follow this checklist to help prepare for leading a MOAA chapter:

- ✓ Review the MOAA *Council and Chapter Policies and Procedures Guide* in its entirety.
- ✓ Familiarize yourself with the contents of the council and chapter page of moaa.org.
- ✓ Be a national MOAA member (or the spouse of a national MOAA member).
- ✓ Be opted in to receive communications from national MOAA, including The MOAA Newsletter and council and chapter content.
- ✓ Ensure the electronic roster is updated with new affiliate officers upon installation.
- ✓ Ask for a new president's package from national MOAA if you haven't received one.
- ✓ Watch the recordings of past leaders' workshops, roundtables, and other leader training opportunities.

**AFFILIATE CHECKLIST**

Here are a few additional tips for a healthy chapter:

- ✓ Have a clearly stated mission.
- ✓ Ensure all officers are familiar with the MOAA website and *Policies and Procedures Guide*.
- ✓ Address membership renewals proactively.
- ✓ Update Committee Module roster and check Near Real Time Report monthly.
- ✓ Develop a succession plan.
- ✓ Submit awards nominations regularly.
- ✓ Use existing technology/tools.
- ✓ Publish a newsletter (print or electronic).
- ✓ Have a well-maintained website and social media presence.
- ✓ Engage with your state council and national Council and Chapter Affairs.
- ✓ Participate in offered training.
- ✓ Engage in community service and advocacy activities.
- ✓ Engage with other military and veteran service organizations/coalitions/chamber of commerce.

**DEVELOPING YOUR CHAPTER MISSION STATEMENT**

**Why do you exist?**

- Define your purpose in a clear and direct mission statement.
- Be mission-driven. When making decisions, consider alignment with the mission.
- Listen to prospective members and talk about the impact of your mission.
- Proudly share your mission in your chapter marketing materials.

## GRASSROOTS ADVOCACY

**Goal: Influence in each congressional district.**

- Remember that legislators want to hear from constituents.
- Promote MOAA's Legislative Action Center ([www.moaa.org/takeaction](http://www.moaa.org/takeaction)).
- Appoint a 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.
- Look for legislative updates/alerts in The MOAA Newsletter (weekly).
- Participate in annual advocacy events.
- Join virtual chapter(s).

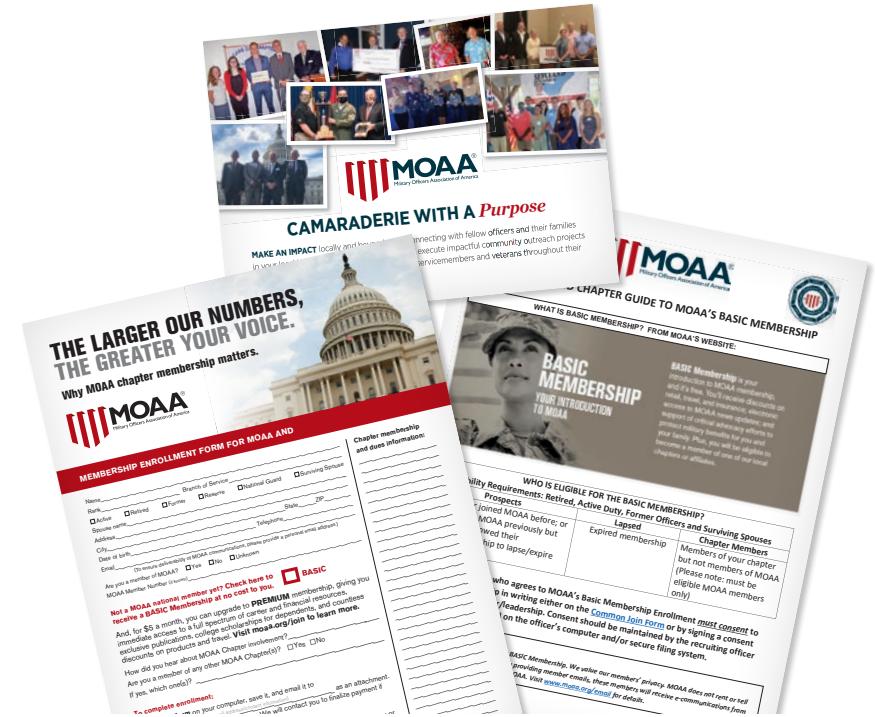
## VIRTUAL CHAPTERS

These provide an opportunity for MOAA members to connect on topics of interest, regardless of geographic location.

### MOAA's virtual chapters include:

- Uniformed Services Nurse Advocates Virtual Chapter
- Surviving Spouse Virtual Chapter
- Public Health Service Virtual Chapter
- Chaplains Virtual Chapter
- Judge Advocate Virtual Chapter
- Advocacy for Servicewomen and Military Families Virtual Chapter
- Public Affairs and Communication Professional Virtual Chapter

Please encourage members to participate in these virtual chapters.



## TOOLS AND RESOURCES FOR RECRUITING AND RETENTION

Visit [www.moaa.org/chapters](http://www.moaa.org/chapters) for more information.

## PROGRAMMING

- **Visit request form.** Request a national MOAA leader to visit (in-person or virtually) councils annually and chapters every two to three years, pending availability.
- **Electronic messaging.** Schedule a blast email to be sent to MOAA members in your ZIP code catchment area to promote an event.
- **Postcards/revitalization.** Revitalize an at-risk chapter with a postcard mailing to MOAA members in the area inviting them to connect with the chapter.
- **Templates.** Use draft templates on the website to easily communicate about membership, including a recruiting email draft you can use to encourage officers in your area to join.

## AWARD INFO

Visit [www.moaa.org/ccawards](http://www.moaa.org/ccawards) to learn more about chapter award programs.

## RECOGNITION

- **Individual Awards.** Recognize individual efforts through one of these various awards:
  - Leadership Award for council/chapter leaders
  - Outstanding Service Award for chapter members
  - President's Award for previous leader recipients of the Leadership Award
  - Chairman's Award for leaders demonstrating extraordinary impact toward furthering MOAA's mission
  - 100th Birthday Certificate for any MOAA member turning 100 years old
- **Organizational Awards.** Apply for one of four major annual awards:
  - MOAA Levels of Excellence Awards
  - Col. Marvin J. Harris Communications Awards
  - Col. Steve Strobridge Legislative Chair/Liaison Award
  - Surviving Spouse Liaison Excellence Award
- **Ceremonies.** Honor award recipients through organized award ceremonies.
- **Military Officer magazine and e-newsletter.** Share kudos for member efforts by submitting suggested highlights in MOAA communications.

## TECHNOLOGY

- **Electronic funds transfer (EFT) account.** Chapters must have an EFT account to receive funds from national MOAA.
- **Online dues.** Use MOAA's online chapter dues payment portal to make joining and renewing easy.
- **Recruitment tracker.** A monthly update is provided online for your chapter to track chapter members added and any recruitment incentives the chapter has earned, year to date.

## RECRUITMENT PROGRAMS

- **Annual recruiting incentive.** This annual incentive is in place to promote chapter members becoming

paid national MOAA members. Chapters may earn \$15 for every incentive-qualified Premium member and \$30 for every incentive-qualified Life member who is new or upgrades during the calendar year.

- **Chapter voucher program.** To promote chapter membership, all new (or upgraded) Premium and Life national MOAA (non-chapter) members receive a chapter voucher in their new membership kits that can be redeemed for free trial chapter membership. National MOAA will provide the following annually to chapters for paid MOAA members who join a chapter for the first-time: \$15 to offset one year of chapter membership for Premium members and \$30 to offset two-years of chapter membership for Life members.

## COMMUNITY OUTREACH

- **Grants and sponsorships.**
  - Community Outreach Grants from The MOAA Foundation. Application for grants of up to \$5,000 is open annually from Dec. 1 to Feb. 28.
  - Community Outreach Sponsorship. Apply for up to \$300 per chapter or \$800 per council to support community service programs and recruiting/branding events.
- **Chapter gear/logos.** Promote your brand through items from The MOAA Store at [www.moaa.org/moaastore](http://www.moaa.org/moaastore).
- **Videos.** Share our videos to tell the story of MOAA.
- **Retiree Appreciation Day/Recruiting Kits.** Request materials to promote the benefits of joining MOAA.
- **Publications.** Share MOAA resources on topics such as personal finance, military benefits, career transition, survivor issues, chapters, and spouse and family. View these publications at [www.moaa.org/publications](http://www.moaa.org/publications).
- **White Label Newsletter.** Add your logo and

event information to this monthly chapter newsletter template provided by Council and Chapter Affairs staff and share timely content with members.

#### OTHER

- **Training Opportunities.** Participate in webinars, monthly roundtables, and leadership workshops. View recordings online.
- **Discounts and Benefits.** Be familiar with the exclusive benefits of belonging to MOAA, and share with members and prospects.

#### MEMBER DATA

Select leaders have access to these tools to manage member data:

- **Committee Module.** Review, make changes, and add/remove members and officer positions to your official roster in MOAA's database.
- **Near Real Time Report.** This report provides access to a prospective member list for recruitment purposes.

Councils and chapters should maintain their own membership rosters and use the Committee Module to update national MOAA with members who are eligible for MOAA membership only.

MOAA is working to expand council and chapter access to member data while respecting privacy preferences.

Member data may not be shared for commercial purposes.



#### COMMITTEE MODULE TUTORIAL

Visit [www.moaa.org/committee module](http://www.moaa.org/committee-module) to learn how to navigate the module.



#### CHAPTER COMMUNICATIONS

Keep up to date on the latest MOAA news. Communicate about the good work your council, chapter, or members are doing on behalf of MOAA.

- Military Officer magazine
- MOAA.org
- The MOAA Newsletter
- White Label Newsletter
- Social Media

#### RECRUITING BEST PRACTICES

Remember that every member is a recruiter. Make it easy to understand the value of membership with these tips:

- Use the Common Join Form. Add your logo and information to this membership form for chapter and national membership.
- Build a recruiting package (invitation letter, current newsletter, membership application), and carry it with you to places where you might meet prospective members.
- Provide online join option; use MOAA's online chapter dues program.
- Establish recruiting budget line to intentionally fund outreach.
- Challenge members with an internal recruiting competition.
- Have an up-to-date website or web presence.
- Highlight your chapter on social media.
- Try conducting meetings at different venues and times.
- Connect with base retirement services office or transition center.
- Sponsor a table at enlistee, military, retiree, or veteran recognition events.
- Strive for and earn MOAA recruiting and retention incentives and awards.
- Follow up with prospects after initial contact and/or first meeting.

## GENERATIONAL RECRUITING

Answer the question, "What's in it for me?" and show the relevance of your chapter.

- Create a strong first impression with a welcoming environment.
- Integrate new attendees quickly; consider assigning sponsors for new members.
- Consult with target demographic and listen to interests.
- Provide opportunities to make a difference.
- Survey members; plan events based on interests and current events.
- Provide relevant, accessible programming.
- Encourage former officers to join for the camaraderie.

## LEADERSHIP SUCCESSION TIPS

One of the most critical issues for chapter longevity is ensuring you have members ready to transition into leadership positions and take the helm.

Develop a succession plan and employ these tips:

- Review present bylaws/fill critical positions first.
- Review current term limits and job descriptions.
- 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 smaller volunteer roles.
- Be inclusive and proactive in including surviving spouse members and spouses.
- Develop a chapter operations handbook.
- Have an active awards/recognition program.
- ASK individuals to step into roles.

## NON-DUES REVENUE GENERATION

Take advantage of opportunities through national MOAA to generate revenue and consider other options, including:

- Recruiting incentives
- Community grants and sponsorships
- MOAA Vacations rebate. Receive a rebate for every chapter member that books a MOAA Vacation.
- Receive \$100 for sharing a MOAA Vacation ad in your newsletter and/or website.
- AMBA advertising. Receive \$100 for sharing an AMBA ad in one of your member communications.
- Newsletter advertising
- Local retail sponsors
- Auctions
- Golf tournaments

## TRAINING WORKSHOPS, ROUNDTABLES, AND OTHER RESOURCES

National MOAA holds events throughout the year to train and engage with council and chapter leaders on a range of chapter management topics. These include regional leadership training workshops and monthly virtual roundtables. To learn more about these events and view the schedule, visit [www.moaa.org/chapter-training](http://www.moaa.org/chapter-training).

Additionally, please refer to the following resources for information to help you in your role leading a MOAA council or chapter:

- *Council and Chapter Policies and Procedures Guide*
- MOAA Chapter Recruitment Guide
- Webinars
- Electronic Newsletter
- [chapters@moaa.org](mailto:chapters@moaa.org)
- (800) 234-MOAA (6622)

# SURVIVING SPOUSE LIAISON OVERVIEW



'The involvement and contributions of the surviving spouses and spouses in our chapter have greatly increased the vibrancy, energy, and strength of our chapter.'

— A North Carolina chapter leader

In 2013, surviving spouses became full-fledged members of MOAA. In 2014, a seat was created on MOAA's board of directors to be filled by a surviving spouse. Currently, surviving spouses make up about 13% of MOAA membership.

All surviving spouses are encouraged to participate in MOAA at both the national and chapter levels. Chapter membership — both in geographic and virtual chapters — offers surviving spouses an opportunity to engage at the MOAA grassroots level and experience camaraderie with other military members. While some are content to attend chapter functions and socialize, other surviving spouses choose to continue serving through their chapters and engage in leadership roles such as chapter officers, project leaders, and surviving spouse liaisons.

### SURVIVING SPOUSE LIAISONS

Surviving spouse liaisons work at the council and chapter level to ensure fellow survivors remain connected to the military family and participate in local and national programs and advocacy efforts. They serve as the council/chapter point of contact and resource for surviving spouse and spouse legislative and benefits issues. Any member — male or female

— or a spouse can be appointed to the position. They do not have to be a surviving spouse. The only requirement is they can pass on important information that affects surviving spouses and spouses and provide support and assistance when and where needed. The role of liaisons varies with each chapter, depending on location, number of surviving spouses, chapter size, community needs, etc.

### EDUCATE, ENCOURAGE, AND ENGAGE

Surviving spouse liaisons promote the key values of MOAA — advocacy, membership, council and chapter support, engagement/resources, and The MOAA Foundation and MOAA Scholarship Fund — by educating, encouraging, and engaging other surviving spouses, MOAA members, the greater military community, and elected officials.

#### Educate:

- **Advocacy.** Share information about topics important to surviving spouses and spouses, including the Survivor Benefit Plan-Dependency and Indemnity Compensation offset, remarriage and the effect on benefits, and issues that impact

#### TIPS FOR EDUCATING

- 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, and provide them with the resources they need to do their job.
- Listen!

## **SURVIVING SPOUSE AWARD**

Visit [www.moaa.org/ccawards](http://www.moaa.org/ccawards) to learn how you can nominate a surviving spouse liaison for a Surviving Spouse Liaison Excellence Award from national MOAA.

the benefits of active duty, National Guard, and Reserve surviving spouses.

- **Planning Ahead.** Discuss the importance of members and spouses talking to each other about death and ways to prepare, including:
  - Make an appointment with your spouse/child/trusted friend to discuss paperwork.
  - Make some personal decisions and list them.
  - Gather important papers – DD Form 214, 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 advisor.
  - Ensure bank accounts are accessible.
  - Gather all passwords in one place.

### **Encourage:**

- **Council and Chapter Support.** Surviving spouses should apply for chapter/council board positions, volunteer for leadership positions, solicit input to design programs of interest, and promote legislative issues. Chapter leaders should incorporate surviving spouses in all aspects of chapter management.

### **TIPS FOR ENCOURAGING**

- Appoint/elect surviving spouses to leadership roles.
- Invite them to lead special projects.
- Request feedback.
- Submit for national MOAA recognition.

• **MOAA Membership.** Initiate post-death contact, and invite a surviving spouse to chapter meetings. Make phone calls, and offer rides. Inform potential members about MOAA benefits. Remember, surviving spouses are regular members. Their spouse did not have to be a MOAA member — surviving spouses can join on own. Visit [www.moaa.org/join](http://www.moaa.org/join) for more details.

### **Engage:**

- **Grassroots Support.** Participate in the legislative process. Register for MOAA's Legislative Action Center at [www.moaa.org/takeaction](http://www.moaa.org/takeaction).
- **Spread the Word.** Speak to community groups about MOAA, and coordinate major events that bring attention to MOAA.
- **Share Your Story.** Your personal experiences as a surviving spouse can help guide others on their journey. Reach out to other surviving spouses or write a column for your chapter newsletter.



### **DID YOU KNOW?**

Statistically, women are far more likely to be widowed and far less likely to remarry than men. Of the approximately 14 million surviving spouses in America today, over 11 million are women.

### **TIPS FOR ENGAGING**

- Ask for recommendations from and design programs of interest for spouses and surviving spouses.
- Communicate with surviving spouses through newsletters, personal contact, and at meetings.
- Provide resources about benefits.
- Assist and support during personal loss.
- Provide opportunities for involvement in community activities and military events.

## MEET THE COUNCIL

Visit [www.moaa.org/ssac](http://www.moaa.org/ssac) to learn more about the current members of the Surviving Spouse Advisory Council.

## SURVIVING SPOUSE VIRTUAL CHAPTER

This MOAA virtual chapter connects surviving spouses across the U.S. and throughout the world and provides opportunities to educate, encourage, and engage. There are no dues, but to join, you must be a national MOAA member. The chapter holds virtual meetings monthly, except for November and December, on the third Tuesday of each month. Discussion topics include legislative updates, health care issues, financial planning, and other issues important to surviving spouses and spouses. To join, email [mssvc02@gmail.com](mailto:mssvc02@gmail.com).

## SURVIVING SPOUSE ADVISORY COUNCIL

The Surviving Spouse Advisory Council (SSAC) was established in 2004 to report to and advise MOAA's president about issues that are important to the surviving spouses of MOAA members. Its main goal is to represent both survivors and military spouses about issues that impact them.

Current members of the council represent all services and several states and bring a broad swath of experience. Each member was nominated by his or her chapter and then thoroughly vetted and selected by members of the SSAC. While the SSAC initially was organized to work with surviving spouses, the council has expanded its role to work with military spouses to help better prepare them for the future.

Members also write an online monthly Surviving Spouse Corner column. Read past columns at [www.moaa.org/survivingspousecorner](http://www.moaa.org/survivingspousecorner).

To contact the SSAC, email [sscomm@moaa.org](mailto:sscomm@moaa.org).

## RESOURCES AND SUPPORT

In addition to your council/chapter surviving spouse liaison, MOAA provides these resources for surviving spouses:

- National MOAA's Surviving Spouse webpage, [www.moaa.org/survivors](http://www.moaa.org/survivors)
- Surviving Spouse Advisory Council, [www.moaa.org/ssac](http://www.moaa.org/ssac)
- Monthly Surviving Spouse Corner, [www.moaa.org/survivingspousecorner](http://www.moaa.org/survivingspousecorner)
- Surviving Spouse Virtual Chapter, [mssvc02@gmail.com](mailto:mssvc02@gmail.com)
- MOAA Surviving Spouses & Friends Facebook group, [www.facebook.com/groups/581427115240904](http://www.facebook.com/groups/581427115240904)
- MOAA Surviving Spouse Publications, [www.moaa.org/publications](http://www.moaa.org/publications)
- Day After Calls – Minnesota Chapter, [www.moaa.org/dayafter](http://www.moaa.org/dayafter)



NEVER STOP SERVING



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