Chapter Management

Florida Council of Chapters
Leadership Seminar
January 10, 2020
Chapter Management

The healthy chapter model:
- Chapter purpose/mission
- Legislative advocacy engagement
- Community involvement
- Membership growth

Often reflected by:
- Use of committee module/other electronic tools
- Up-to-date leadership roster
- Recruiting and retention statistics
- Electronic funds transfer; online dues program
- Use of sponsorship and grant programs
- National and Council engagement
  - Meetings/Workshops
  - Chapter visit every 3-4 years
Chapter Mission Statement

**Develop** – Identify your purpose

**Articulate** – Listen; incorporate mission in responding to need of prospect

**Restate** - Include in your chapter marketing materials
Community Involvement

- Guard/Reserve
- Active duty installations
- Base Transition Centers
- Retirement Service Office
- Retiree Appreciation Days (RADs)
- JROTC/ROTC
  - Judge drill competitions
  - Awards
  - Connect with cadre
- Campus Veteran Service Offices
- Base/VA medical facilities

- Community events
  (Veterans Day and Memorial Day)
- Partner with civic/service organizations
- Chamber of Commerce
- State Military Coalition
- Veterans Treatment Courts
- American Flag Protocol Initiative
- Scholarship programs
- Restore/create veterans monuments
MOAA Foundation
Community Outreach Grants

- Annual Grant Online Application: **Dec 1 to Feb 29**
  - Go to [www.MOAA.org/Foundation](http://www.MOAA.org/Foundation) to learn more and apply
  - New this year: Successful Grant webinar

- **Program must fall into 1 of 9 Categories:**
  - Housing
  - Food Assistance
  - Employment
  - Health (and Mental Health)
  - Family Support
  - Community Reintegration
  - Financial Assistance
  - Legal Assistance
  - Transportation

- **MOAA Grant Criteria**
  - Not Greater Than $5,000 Each
  - MOAA Council / Chapter must perform a leadership/management role; active engagement, not pass-through
  - MOAA Council / Chapter must have proof of General Liability Insurance
## 2019 Community Grants

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Program Description</th>
<th>Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keowee Chapter, Salem, SC</td>
<td>Community Collaboration</td>
<td>$3,750</td>
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<tr>
<td>Kings Bay Chapter, King’s Bay, GA</td>
<td>High School Recognition Program</td>
<td>$3,750</td>
</tr>
<tr>
<td>South Central Florida Chapter, Sebring, FL</td>
<td>Community Collaboration</td>
<td>$3,750</td>
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<tr>
<td>Historic Mayport Chapter, Atlantic Beach, FL</td>
<td>Community Meals Program</td>
<td>$3,750</td>
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<tr>
<td>Tampa Chapter, Tampa, FL</td>
<td>Wounded Warrior Care</td>
<td>$3,750</td>
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<tr>
<td>Keystone Capital Chapter, Camp Hill, PA</td>
<td>Service Dog Program</td>
<td>$3,750</td>
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<tr>
<td>North Texas Chapter, Carrollton, TX</td>
<td>Community Collaboration</td>
<td>$1,250</td>
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<tr>
<td>North DFW Chapter, Lewisville, TX</td>
<td>Vet Clinical Counseling Program</td>
<td>$2,500</td>
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<tr>
<td>Southeast Idaho Chapter, Idaho Falls, ID</td>
<td>Vet Outreach Program</td>
<td>$650</td>
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<tr>
<td>Treasure Coast Chapter, Port Saint Lucie, FL</td>
<td>Meals Program</td>
<td>$2,500</td>
</tr>
<tr>
<td>Sarasota Chapter, Sarasota, FL</td>
<td>Military Recognition Event</td>
<td>$2,500</td>
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<td>Greater Dallas Chapter, Dallas, TX</td>
<td>Community Collaboration</td>
<td>$2,500</td>
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<tr>
<td>Indian River Chapter, Vero Beach, FL</td>
<td>Vet Home Improvement Aid</td>
<td>$5,000</td>
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<tr>
<td>Charlotte-Metrolina Chapter, Charlotte, NC</td>
<td>Transitioning Vet Mentors</td>
<td>$5,000</td>
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<tr>
<td>Grand Strand Chapter, Myrtle Beach, SC</td>
<td>Vet Stand Down Day</td>
<td>$5,000</td>
</tr>
<tr>
<td>Luke Chapter, Sun City West, AZ</td>
<td>Enlisted Assistance Program</td>
<td>$5,000</td>
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<tr>
<td>South Alabama Chapter, Mobile, AL</td>
<td>Peer Wellness Program</td>
<td>$5,000</td>
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<tr>
<td>Southeast Wisconsin Chapter, Milwaukee, WI</td>
<td>Fallen Heroes Summer Camp</td>
<td>$5,000</td>
</tr>
<tr>
<td>Ft. Campbell Chapter, Clarksville, TN</td>
<td>Vet Treatment Court</td>
<td>$3,750</td>
</tr>
<tr>
<td>Northwest Florida Chapter, Shalimar, FL</td>
<td>Homeless Vet Program</td>
<td>$3,750</td>
</tr>
<tr>
<td>Southwest Oklahoma Chapter, Lawton, OK</td>
<td>Airport Military Welcome Ctr</td>
<td>$3,750</td>
</tr>
<tr>
<td>Southeastern North Carolina Chapter, Wilmington, NC</td>
<td>Vet Education Assistance</td>
<td>$3,750</td>
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Liability Insurance Considerations

- Cost for coverage depends on member count and state where the chapter is located; price per member varies by state.
- Price per member ranges from $0.70 to $3.00 depending on state.
- Recommend getting estimates from local brokers.
- For more info—contact Michele Armesto at Mercer (michele.armesto@mercer.com)
Membership Growth: Recruiting and Retention
Committee Module

• President and Membership Chair
• Review instructional guide and webinar
• Access monthly
• Keep officer information updated
• Adding new members
Recruiting Tools and Resources

- Recruiting Program Guide
- Common Join Form
- Voucher program
- Near Real Time Notification
- President’s “Permission Granted” Message
- RAD/Recruiting kit/Publications
- Electronic Messaging
- Virtual Chapters
- “Why MOAA” and “Year in Review”
- Online Dues Renewal
Recruiting Best Practices

- Strive for and earn recruiting and retention incentives and awards
- Establish recruiting budget line
- Every member is a recruiter
- Create internal recruiting competition
- Build a recruiting package (invitation letter, current newsletter, membership application)
- Always carry recruiting packages
- Place chapter membership applications on website
- Local media, earned media
- Use social media to expand your reach (i.e., chapter Facebook page)
- Conduct meetings at different venues and times to meet member needs and encourage active participation
- Connect with base retirement services office (RSO) or transition center
Retention Key Points - Inclusion

Integrate new members quickly

First impressions of chapter – key

Sponsors for new members

Survey chapter members for interests
Value-added programming

- Mission
- Social
- Current Events & Interests

MOAA
Military Officers Association of America
Leadership Succession Tips

• Review present election procedures
• Begin generating interest in leadership positions well before a call for nominations
• Develop a chapter operations handbook
• Pre-identify potential candidates while conducting normal chapter business
• Groom and mentor potential leaders and get them involved in a chapter committee
• Review current term limits. A two-year term is probably the best option
• Be inclusive and proactive in including surviving spouse members and spouses
• Develop active awards / recognition program
Struggling Chapter?

- Inform and involve Council President and MOAA Council and Chapter Affairs
- Chapter should exhaust all means to continue operations
  - Recruit new members and elect new officers
  - Use/request national MOAA support
  - Consider satellite arrangement
  - Think out of the box!
- Document and communicate all actions
Chapter Rescue

• If/when chapter has tried all other avenues, and
• In discussion with the council and MOAA C&C, on a case-by-case basis,
• A rescue visit may be appropriate
  – Ask MOAA National for rescue assistance after 60-90 days of pre-rescue efforts
  – Request rescue visit at least 60 days in advance
Chapter Closing Checklist

1. Exhaust all means to continue operations:
   a. Attempt to rejuvenate the chapter by recruiting new members and electing new officers
   b. Request support from Council leadership
   c. Request support from MOAA National
   d. Attempt to form a satellite arrangement with another chapter

2. Failing all of these things, when the chapter’s board of directors has voted to close the chapter:
   a. Chapter President must notify MOAA national, in writing, of intent to close
   b. Chapter board of directors should vote on and record the proper disposition of funds
      i. Funds may not be returned to chapter members
      ii. Funds may be sent to the state council or philanthropic organizations such as the MOAA Foundation, MOAA Scholarship fund, etc.
   c. Close out chapter’s bank account and post office box (if applicable)
   d. Return original charter to MOAA national
   e. Submit final IRS Form 990 and formally dissolve the chapter as a tax-exempt 501 (c) organization (if applicable)
   f. Take down chapter website
Revenue Generation

- Recruiting Incentives/Awards
- Community Grant
- USAA Sponsorship Program
- MOAA Vacations Rebate
- Mercer Ad
- Newsletter Advertising
- Local Retail Sponsors
Resources

• [www.moaa.org](http://www.moaa.org)
  – C&C Policies and Procedures Guide
  – Electronic Appendix
  – Leaders Workbook
  – Webinars
  – Electronic Newsletter
• chapters@moaa.org
• 1-800-234-MOAA
## Key Dates 2020

<table>
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<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>1 Jan</td>
<td>Mercer Insurance Ad Campaign Begins</td>
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<tr>
<td>1 Feb</td>
<td>Marvin A. Harris Communications Awards submissions due</td>
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<tr>
<td>29 Feb</td>
<td>MOAA Foundation Community Outreach Grant deadline</td>
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<tr>
<td>1 Mar</td>
<td>Scholarship application deadline</td>
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<tr>
<td>Mar 22-26</td>
<td>Storming of the Hill/Council Presidents Seminar</td>
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<tr>
<td>1 May</td>
<td>Levels of Excellence Awards submissions due</td>
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<tr>
<td>1 Jun</td>
<td>Surviving Spouse Liaison Awards submissions due</td>
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<tr>
<td>1 Jun</td>
<td>Steve Strobridge Legislative Liaison Awards submissions due</td>
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<tr>
<td>Oct 21-25</td>
<td>MOAA Annual Meeting /LOE Awards Dinner- Oct 23 Kansas City</td>
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Leader Training Workshop Schedule

2020 Dates/Locations

Orlando, FL
Jan 10-11
AL, FL, GA

Kansas City, MO
May 1-2
AR, IL, KS, MO, OK, NE

Louisville, KY
Nov 13-14
AL, AR, GA, IL, IN, KY, LA, MS, OH, TN

Colorado Springs, CO
Sep 25-26
CO, NM, UT, WY, AR, NE