



**MILITARY OFFICERS
ASSOCIATION OF AMERICA
Arizona Council of Chapters**

MINUTES OF THE ARIZONA COUNCIL OF CHAPTERS

0800 Hours, Friday, 3 May 2019

HOSTED BY THE GRAND CANYON CHAPTER MOAA

INATTENDANCE

Arizona Council of Chapters

President: Col Peter Kloeber
Vice President: Col Tom Owens
Secretary: Mrs. Pam Wojtas
Legislative Affairs: Col Lee Lange
ESGR: CAPT Ed Mangan
**Immediate Past President and Chapter
Development:** Lt Col Richard Jonas
**Past Chapter President and Chapter
Development:** Col Ron Perkins
Surviving Spouse Advisory Council: Sharon Douglas
Newsletter Editor: Lt Col Nicholas Knight

Arizona Chapter

President: CDR Mike Rogers

Coronado Chapter

President: Chaplain, COL Thomas Day

Grand Canyon Chapter

President: LTC Steve Jarvis

1st Vice President: LT Cliff Deeds

2nd Vice President: CPT Ray Jordan

Treasurer: Lt Col Martin Levendusky

Director: LCDR John Dunn

Director: Col Thomas Waddell

Newsletter: Col Rebecca Seeger

Green Valley Chapter

1st Vice President: 1LT Elliott Jones

Luke Chapter

President: Col Michael Kramer

3rd Vice President: LTC Bob Nelson

Director Leadership Succession: COL Jerry Wojtas

Northern Arizona Chapter

President: LCDR Clyde Meade

Secretary: Col George Weil

Newsletter Editor: Mrs. Mary Jonas

Spouse: Mrs. Heather Weil

Superstition Mountain Chapter **President:** Lt Col John Bushko
Vice President Surviving Spouse Liaison: Judy Bushko
Tucson Chapter **President:** Col Tom Owens
Yuma Chapter **President:** Lt Col Nicholas Knight
Catalina Mountain Satellite **President:** COL Bill Nagy
Central Arizona Satellite **Membership:** 1LT Norman Poole

Guest Speaker: Col Wanda Wright, Director, ADVS

Call to Order: Col Peter Kloeber called the meeting to order at 0800. Col Kloeber thanked everyone for coming. He also thanked LTC Steve Jarvis and the Grand Canyon Chapter for hosting the spring council meeting.

Pledge of Allegiance: Mrs. Pam Wojtas led the attendees in the Pledge of Allegiance.

Invocation: The invocation was given by Chaplain (COL) Thomas Day, Coronado Chapter President.

Welcome by Grand Canyon Chapter: LTC Steve Jarvis welcomed everyone to Flagstaff. He also stated he appreciated everyone paying the treasurer. LTC Jarvis mentioned a few housekeeping items; location of the restrooms, checkout time of 11 a.m., lunch in the open area of the lobby. He stated lunch would consist of a variety of sandwiches, salads, dessert and drinks. He also mentioned to make sure to look at the excellent view.

President's Opening Comments / Intro of Guests: Col Pete Kloeber stated that the semi-annual meetings of the council would take place in May and November. He stated he has already been in touch with 1LT Joe Longo, President of the Green Valley Chapter and host of the fall council meeting. Col Kloeber stated that since our fall 2018 council meeting, four new chapter presidents have been elected and that in July there will be a fifth. He thanked the new attendees for coming.

Col Kloeber asked the chapter presidents their expectations for the day's session. Their expectations are: Lt Col Nicholas Knight – make everyone familiar with the Billet Guide; CDR Mike Rogers – figure out how to get former officers to opt in to a chapter; COL Bill Nagy – retention; LCDR Clyde Meade – sharing of ideas; LTC Steve Jarvis – for board members to hear objectives; Col Tom Owens – meet new people; 1LT Elliott Jones – figure out what is going on; Col Mike Kramer – attract younger members; Chaplain (COL) Tom Day – meet new people; Lt Col John Bushko – learn more about what is going on in Arizona and recruiting. Col Kloeber stated his expectation is for it to be a beneficial day for all attendees.

Col Kloeber stated he is passing around a sheet for the chapters to sign up to order more coins.

Col Kloeber reminded everyone that for any vote today, those eligible to vote are council officers, chapter presidents and past council presidents.

Presentation of Communication Awards

MOAA-Wide

- 71 Websites

- 5-Star = 68 (Council = 7; Chapter = 61)
- 4-Star = 3 (Council = 1; Chapter = 2)
- Print Newsletters
 - 5-Star = 70 (Council = 3; Chapter = 67)
 - 4-Star = 9 (Chapter)
- E-Newsletters
 - 5-Star = 1 (Chapter)
 - 4-Star = 1 (Council)

Arizona

- 4 Websites
 - 5-Star = 4
 - Arizona, Coronado, Luke, Superstition Mountain
- 6 Print Newsletters
 - 5-Star = 5
 - Coronado, Luke, Superstition Mountain, Tucson, Grand Canyon
 - 4-Star = 1
 - Arizona

After awarding the certificates and medals to the winners of the communication awards, Col Kloeber surprised LTC Steve Jarvis by presenting him with the MOAA Leadership Award.

Reports of Officers

Secretary – Mrs. Pam Wojtas

- Attendance Roster and Roster Update – Mrs. Wojtas passed around the attendance roster for all attendees to sign. She also passed around the master roster and asked everyone to make any needed updates to the roster.
- Minutes of Meeting 1 November 2018 (for Approval) – Mrs. Wojtas stated that there were no corrections to the minutes and asked for a motion to approve the minutes as written. Motion was made by Col Mike Kramer to approve the minutes and seconded by Col Ron Perkins. Motion passed.

Treasurer – Col Lee Lange for Col Charles Bitner

AZCOC Budget Summary – May 3, 2019

● Beginning Balance November 1, 2018	\$8,992.86
● Income to Date	\$1,590.50
● Expenses to Date	\$722.62
● Current Balance	\$9,860.74

Col Lange also passed out the Financial Statement for the period 11/2/2018 to 5/3/2019. (Copy filed with the minutes.)

Staff/Committee Reports

Storming the Hill 2019 – Col Peter Kloeber

Scope/Logistics

- All 50 states
 - 162 “Stormers”
- AZ Team
 - Col Pete Kloeber, USAF (Ret) – Flagstaff – Team Lead
 - Lt Gen John Regni, USAF (Ret) – Litchfield Park – MOAA Board Member
 - Col Mike Turner – MOAA Staff
 - Cynthia Giesecke – Currently Surviving Spouse Advisory Committee
- Scheduling
 - Challenging
 - >150 Emails, >60 Calls, >20 Texts, 22 Letters
 - Four Weeks

Three Issues

- 3.1% Pay Raise
- SBP / DIC Offset – “Widows Tax”
- Tricare

Military Pay and Benefits

- Support the 3.1 percent pay raise in the President’s Budget
 - Aligned with the Employment Cost Index (ECI)
 - Do not reduce for other programs
- Regular Military Compensation (pay and benefits) is a key factor to recruiting and retention for the AVF
- Recruitment 17 – 21 year olds
 - Pool: 20M
 - Meet academic requirements: 11.3M (57%)
 - Eligible to join: 4.4M (22%)
 - Propensity to join: 400K (2%)
 - Services need: 265K (Army 80K) – Army missed goal in 2018 / and likely 2019

SBP / DIC Offset – “Widows Tax”

- SBP = Member-paid insurance annuity
- DIC = VA benefit for service-connected death (\$5,095 per year)
- Current federal law requires forfeit \$1 of SBP for each \$1 of DIC
- Costs most surviving spouses \$12,000 per year
- FY2008 Special Survivor Indemnity Allowance (SSIA)
 - \$310 in 2018 (Indexed to COLA)
 - FY2018 NDAA = “permanent” and inflation protected
 - Provides relief for about 25% of Widows Tax

- Nationally
 - SBP = 313,000
 - DIC = 67,000 = 20%
- Arizona
 - SBP = 9,000 = 15% of 57,000 retirees
 - DIC = 2,000 = 22%
- MOAA Position
 - **Repeal the SBP / DIC offset** (Cost: \$950M per year)

“Widows Tax” Status

- Senate Bill 622
 - Co-sponsors
 - Start of Storming efforts: 34
 - Now: 60
 - Arizona: 2 (Sinema & McSally)
- House Bill 553
 - Co-sponsors
 - Start of Storming efforts: 165
 - Now: 256
 - Arizona: 6 (O’Halleran, Kirkpatrick, Gallego, Grijalva, Gosar, Lesko)
 - Not Yet: 3 (Biggs, Schweikert, Stanton)

Tricare

- Stabilize
 - Threatened each year
 - Co-pays increasing each year
- Stop Disproportional Increases
 - Average civilian family share = 29%
 - Typical military = 25%
 - Delta 4% = Premium for service and sacrifice!

Results

- Meetings – GREAT!
- All 11 AZ legislators – 6 Principals and 5 Staffers
 - Sen Sinema
 - Sen McSally
 - CM O’Halleran
 - CW Kirkpatrick
 - CW Lesko
 - CM Gallego

Council Presidents Seminar – Col Peter Kloeber

MOAA Membership

- Total Membership = 350,000 AZ = 1,041 (↑3%)
 - Reversing decline
- Category
 - Life = 49% AZ = 59%
 - Premium = 23% AZ = 26%
 - Basic = 28% AZ = 6%
- Status
 - Retired = 61%
 - Currently Serving = 21%
 - Former = 3%
 - Surviving Spouse = 14% (50,000) AZ = 12%

Action Item: A question was asked: “Of the 21% MOAA members who are “Currently Serving” – what is the breakout by Active, Guard, and Reserve?”

MOAA Chapters

- Numbers
 - 2006 = 36 Councils and 411 Chapters
 - 2017 = 34 Councils and 405 Chapters
 - 2018 = 34 Councils and 400 Chapters
- Members
 - 2006 = 70,011
 - 2017 = 48,402
 - 2018 = 45,000 AZ = 1,141 (↑3%)
 - 7,500 (~17%) NOT MOAA members AZ = 100 (~9%)
- Permission Granted Campaign – Successful (over 2,000)
- New Potentials to be “Near” Real Time
 - Via Committee Module (Est May 2019)

AZ Chapter Membership

- Chart sent to attendees – copy attached to minutes

Value of Councils

- Lead and coordinate efforts in state legislative advocacy
- Support national MOAA legislative objectives
- Identify / negotiate chapter geographical boundaries
- Help form new chapters or satellites
- Help established chapters become stronger / more effective
- Help revitalize ailing chapters
- Disseminate items of interest / importance to member chapters
- Conduct / sponsor state conventions
- Consolidated communication link with national MOAA
- Represent a consensus of member chapters

- May lead... but not direct member chapters
- *MOAA providing mileage stipend for council presidents – likely increasing*

Value of Chapter System

- One of MOAA’s “Pillars”
- Grassroots advocacy support
- Lead advocacy success for MOAA
- Impactful Community Engagement
- Local MOAA branding
- National membership feed
- Additional member communication channel
- Serve local members’ needs and preferences
- Significant contribution to local scholarships (\$300 – 400K/Year; AZ = \$62K+)
- Camaraderie and networking for members

Value of Chapter System 2018 – 2019 Successes

- Improved chapter communications
- Increased Community Grant participation
- Revitalized ROTC / JROTC Medals Program
- Improved leader training
- Expanded Surviving Spouse training
- Increased openness to satellite arrangements / chapter mergers
- Committee Module
- Increased chapter visitation
- Increased travel stipend for council presidents
- Successful “Permission Granted” campaign

Chapters

- “Affiliated” with MOAA
- Separate Organization Structure
- Chapter = Use of MOAA Name & Brand
- Legal issues / questions – 95% in Policy & Procedure Guide
 - <http://www.moaa.org/Content/Publications-and-Media/MOAA-Publications/Council-and-Chapters-Policy-and-Procedure-Guide-Details.aspx>
- “*Chapters should have liability insurance*”
 - Maj Gen Joseph Lynch, USAF (Ret), MOAA General Counsel
 - AZ = 4 of 9
 - Required for MOAA Community Grants

Chapters

- MOAA has two “Virtual Chapters”
 - MOAA Uniformed Services Nurse Advocates Virtual Chapter (MUSNAVC) – (VC01)

- 174 Members, 43 states, 115 congressional districts
 - Must be MOAA members
 - <https://www.musnavc.org>
- MOAA Surviving Spouse Virtual Chapter (MSSVC) – (VC02)
 - Chartered March 2018
 - 88 Members
 - Surviving Spouse or Surviving Spouse Liaison
 - Surviving Spouses became MOAA members in 2013
- Council Rescue / Closing Procedures
 - Council should work to save
 - Request MOAA “Rescue” visit
- If Decision to Close
 - Notify MOAA in writing
 - Return Charter to MOAA
 - Turn over all monies per Bylaws / Articles
 - 501 (c)19, 501 (c)3
 - Another MOAA chapter
 - MOAA Charity (Scholarship Fund or MMFI)

Did You Know?

- Life Membership converts to surviving spouse
- Premium Membership converts to surviving spouse
 - One year free or remaining time on multi-year... whichever is greater
- Basic Membership is now “indefinite” – does not expire
- Dual Military Couple Life Membership
 - One pays listed amount; the other pays only \$100
- If member joins chapter via MOAA online – still need to add via CM
- “Auxiliary” to “Surviving Spouse” in 2013
- Mercer Insurance will give a chapter \$100
- USAA will give a chapter \$300

MOAA Councils & Chapters

- COL Terri Coles, USA (Ret)
 - Senior Director, ext. 108
- CAPT Erin Stone, USN (Ret)
 - Program Director, ext. 818
- Victoria Twyne
 - Program Manager, ext. 118
- Rebecca Culhane
 - Chapter Affairs Specialist, ext. 120
- Daniel Slattery
 - Chapter Affairs Specialist, ext. 168

MOAA Communications

- Website – complete redesign 3rd Qtr. of 2019
 - 3,500 accesses per month = ↑25%
 - Articles increased 385 to over 900
- Newsletter - ~16K (36%) Chapter Members NOT opted in
 - AZ = 377 (~33%)
 - Important that all members select “OPT IN” and “OPT OUT” options
 - Easy:
 - http://moaa.highroadsolution.com/moaa_preference_page/EmailSearch.aspx
 - Enter Email and select desired frequency and topics
- *Military Officer* Magazine – 230K members
 - October 2019 – Expanded “Chapter” edition (send articles / photos by Aug)
- New MOAA members now opted in for email sharing

MOAA Community Grants

- 44 Applications (29 in 2018 & 9 in 2017)
 - 43 scored (one pulled back)
- Expect 22 or 23 Grants – depending on funding
- Hope to announce by 1 May
- At least \$79K, may go to \$100K
- Expected funding next year = \$100K

Marketing / Affiliates

- USAA Grants
 - Councils - \$800
 - Chapters - \$300
- Mercer Insurance
 - \$100 for Newsletter Ad / Chapter / Year (2019 deadline 31 May)
 - <https://www.moainsurance.com/Council-and-Chapter-Ad>
- Chapter Liability Insurance – Base rate \$330 (approx.. \$3.50/mbr)
- MOAA Vacations
 - Chapters receive “small” percent of revenue from member trips

Key Dates 2019

- May: Quarterly Council Presidents’ Seminar
- May 31: Mercer Insurance Ad Campaign Closes
- Jun 30: Surviving Spouse Liaison Nominations Due
- Jul 31: Col Steve Strobridge Legislative Awards Submission Due
- Aug: Submissions for Expanded C&C Edition Magazine Deadline
- Aug: Quarterly Council Presidents’ Seminar
- Oct: Expanded C&C Edition *Military Officer* Magazine
- Nov: Quarterly Council Presidents’ Seminar
- Dec: USAA Sponsorship Program Opens
- Dec: USAA 2020 Sponsorship Program Opens

- Dec: Chapter Recruiting Program Ends

Legislative Liaison – Col Lee Lange

AZCOC Legislative Update

Federal Legislation

- FY2020 NDAA – Sequestration returns unless new budget deal made – potential \$54B cut to Defense
- DoD Funding Request - \$718B
- President’s Budget includes 3.1 percent pay raise for troops – largest in 10 years

2019 State Legislative Session

- UAV Top 3 Goals
 - Increase Veteran’s Benefits Counselors (VBC’s)
 - Support state level efforts to reduce veteran suicides
 - More resources for “Be Connected” network
- Champions for state tax exemption – Sen David Gowan / Rep Gale Griffin
- No veterans issues in Governor’s budget statement
- Narrow majorities in House and Senate

2019 State Legislative Session

- In session since January 14 – FY2020 Budget Discussions ongoing
- Successes
 - HB 2093: Include \$1.2M for more Veteran’s Benefits Counselors (VBC’s) in AZ – included in budget negotiations
 - HB 2488: Annual report by AZ Dept. of Health Services related to veteran suicides in state – signed April 17

2019 State Legislative Session

- Still in Play
 - HB 2011: Rep Gale Griffin’s original bill called for increase in state tax exemption to \$10K. Other options being considered in budget negotiations
 - SB 1157: Sen David Gowan’s bill for full exemption in 2020 passed Senate. Still working in committee in House

Next Steps

- After Action Review – Legislator Feedback
- Develop Issues for 2020 – UAV Lead
- Chapter Inputs?
- Stay Linked to Veterans Caucus

Future Plans

- Feasibility – AZCOC Storm State Capitol in 2020 / beyond?
- Identify Key Issues – Winnable
- Coordinate w/Military Caucus
- Best Visit Timing – January

Surviving Spouse Liaison – Mrs. Sharon Douglas

Survivor Benefit Plan / Dependency and Indemnity Compensation Offset (SBP / DIC) – “Widows Tax” Update

- The new session of the 116th Congress saw two new bills to amend Title 10 of the United States Code
- The purpose of these bills is to repeal the requirement for reduction of survivor annuities under the Survivor Benefit Plan for military surviving spouses to offset the receipt of Veterans Dependency and Indemnity Compensation
- Currently Surviving Spouses forfeit \$1.00 in SBP for every \$1.00 received in DIC. The loss to survivor is approx. \$12,000 - \$15,000 a year
- The offset affects over 67,000 military surviving spouses

House Bill – HR 553 – The Military Surviving Spouses Equity Act

- As of April 23, 2019
 - This bill has 235 co-sponsors
 - Arizona has 5 of 9 House of Representatives signed on
- They include:
 - Ann Kirkpatrick
 - Paul Gosar
 - Tom O’Halloran
 - Rubin Gallego
 - Raul Grijalva
- Please help us contact and convince the remaining Arizona House of Representatives to become co-sponsors
 - Andy Biggs – District #5
 - David Schweikert – District #6
 - Debbie Lesko – District #8
 - Gregg Stanton – District #9
- The Capitol Switchboard phone number – 1-800-272-6622
- Be sure to mention you are a member of MOAA

Senate Bill – S 622

- As of April 23, 2019 – Senate Bill S 622 has 57 co-sponsors
- Both Senator Sinema and McSally are co-sponsors

Surviving Spouse Virtual Chapter

- MOAA is introducing a new venture called Surviving Spouse Virtual Chapter
- The goal is to provide the following:
 - A national forum for surviving spouses of uniformed services officers
 - A common space to communicate with each other
 - A forum to disseminate information about concerns pertinent to each of us and our families
 - Provide a platform to advocate for protection of rights for our members and dependents
 - Additionally, to become a reliable source for surviving spouses who live in remote areas, who are housebound, who have jobs and children, or who might be unable to participate at the chapter level
 - An application can be found at the following link. It's found under Surviving Spouse Community tab:
<http://www.moaa.org/Content/Personas/Family/Surviving-Spouses.aspx>

Facebook Page

- Another way to stay up-to-date with the latest surviving spouse information is to visit our website. There are over 200 members
- Join us at – Surviving Spouses of MOAA

T*A*P*S – Tragedy Assistance Program for Survivors

- The Tragedy Assistance Program for Survivors (TAPS) is the national nonprofit organization providing compassionate care for the families of America's fallen military heroes
- TAPS provides peer-based emotional support, grief and trauma resources, grief seminars and retreats for adults; Good Grief Camps for children; and casework assistance, connections to community-based care, online and in-person support groups, and a 24/7 resource and information helpline for all who have been affected by a death in the Armed Forces
- Services are provided free of charge
- TAPS was founded in 1994 by Bonnie Carroll following the death of her husband in a military plane crash in Alaska in 1992. Since then, TAPS has offered comfort and care to more than 80,000 bereaved surviving family members
- For more information, please visit taps.org
- TAPS receives no government grants or funding

TAPS Magazine

- FIND INSPIRATION WITHIN THE TAPS MAGAZINE
- TAPS Magazine is dedicated to America's fallen heroes and their surviving families and friends
- This quarterly magazine is sent free of charge to anyone interested in receiving it, including survivors, service members, supporters, and grief professionals. **Subscribe to the TAPS Magazine**

- The Articles in each edition are written by military survivors, grief professionals, and TAPS staff. Find inspiration, comfort, support, resources, and a sense of belonging within these pages

Summation

- I hope you found some of this information helpful. I tried to include items of support as well as ways to get involved and promote MOAA and our Surviving Spouse Community
- I send out an information update / newsletter approximately 4 times a year. I email the information to each chapter Surviving Spouse Representative and to those members who have an email on file
- If you would like to be added to the email list, please let me know
- Also if you have any ideas, comments, or something to add to future Surviving Spouse Newsletters, please let me know
- It has been my pleasure to speak to you today and to finally meet you in person

Contact Information

- Sharon Douglas
- 928-632-5939
- Sharon.Douglas.NACMOAA@gmail.com

Transition Liaison – Tom Day for Harry Bowen

What is Transition Liaison (TL)

- Transition Liaison (TL) is the follow on to the former The Officer Placement Service or TOPS
- This program was established to provide all MOAA members and their spouses with another venue for job research and placement
- The mission of MOAA TL is to compile, publicize, and disseminate job opportunities via its network of industry, MOAA Chapters, military leaders, veteran service organizations, and other MOAA stakeholders
- In summary, the MOAA TL mission is to provide Professional Guidance and Support for MOAA members and spouses in Job Transition

What is the AZ TL

- The Arizona TL Organization is comprised of nearly 40 Business and Industry Executives along with other professionals who routinely provide notices of job opportunities in their areas for posting to the FORMER MOAA TOPS1 database
- MOAA TL AZ is an arm of the MOAA Organization serving the Arizona Community
- MOAA AZ operates a website at “moaatopsaz.org” for the purpose of posting information of interest to our stakeholders
- If you have information you want to share, send that information to me and I will have it posted on the website

Services Provided

- Provide local networking contacts for MOAA members and spouses in job / career transition
 - Each Chapter is viewed as a primary career and geographic resource
 - Each Chapter provides needed “sponsor” assistance
- Provide Job Listings on the website for access to the membership
- Provide Career Fair Listings
- Provide career related links and information for the membership in transitioning to civilian workforce as well as pertinent military and retired changes in benefits
- Serve the membership with Networking Contacts

Results of Last Five+ Months

- Jobs Posted: 138 Single and 4 Multi-listing
 - Single Announcements: 138
 - Arizona State-wide: 129
 - Continental United States (CONUS) Wide: 7
 - Outside Continental United States (OCONUS): 2
 - Multiple Listings: 12 for 515+ 3 unspecified number
 - Arizona State-wide: 5
 - CONUS-wide: 7
 - OCONUS: 2+ 3 for unspecified number of positions
- Job Fairs Published: 2
 - Arizona State-wide: 2
 - CONUS-wide: 0
- Links for Transition and Job Seekers: 6
 - Talent Bridge
 - Social Work
 - Education
 - AZ Department of Veterans Affairs
 - Transition Guidance
 - On-time Teaching

Action item: A question was asked: “Do you know the success rate of people getting jobs from the job postings, job fairs, or resources which are available?”

Resources Available

- National
 - MOAA
 - Career Center website: www.moaa.org/careers
 - Linked In (Join MOAA Career Networking Group)
- Arizona
 - Council and Chapter Policies and Procedures Guide
 - Arizona MOAA website: moatopsaz.org

Contacts

- Every Chapter President, TL Coordinator, and any interested Parties (stakeholders) are a source of information
- Every action posted on the website is identified via (3) separate messages to:
 - TL Representatives
 - Other Stakeholders
 - Chapter Presidents

My Contact Information

- Harry E Bowen, Sr.
- harrybowen@aol.com
- Cell: 520-508-2685
- Home: 520-458-1058

Over-Arching Goal of AZ TL

- Bottom Line remains to provide the most current and highest quality professional guidance and support for our MOAA Members and Spouses in transitioning to the civilian workplace and finding a job or career in Arizona

ESGR – CAPT Ed Mangan

What's In It For Me?

Employee Outreach

- Promote a culture where all employers support and value military service through education, recognition, and mediation

Military Outreach

- Make Service members aware of their rights and responsibilities under the law and the value of employer support and recognition

Employment

- Increase career opportunities through strategic relationships with employers, State and Federal partners, and professional associations

Ombudsman Services

- Provide informal, neutral mediation for issues or conflicts between employers and Service members before they escalate

What Protections Do I Have?

- The Uniformed Services Employment & Reemployment Rights Act (USERRA) is a Federal statute that protects Service members' and veterans' civilian employment rights.

- An employer must not deny **initial employment, reemployment, retention in employment, promotion, or any benefit of employment** to an individual on the basis of his or her membership, application for membership, performance of service, application for service, or obligation for service in the uniformed services.
- Among other things, under certain conditions, USERRA....
 - Requires employers to put individuals back to work in their civilian jobs after military service
 - Restores employees who engage in military service to the **same level of seniority, status, and pay** ordinarily attained if they were not called up for military service.
- Protects Service members from discrimination in the workplace based on their military service or affiliation
- **NOTE:** National Guard Service members called to duty on State Active Duty orders (for floods, fires, etc.) are protected under state-level statutes, not Federal USERRA protections.

What Are The Requirements?

Service Member Responsibilities

- Provide advanced notice to employer (verbal or written)
- Leave a civilian job for fulfillment of military obligations
- If on extended active duty, receive a qualifying military separation (served honorably)
- Serve for no more than five cumulative years away from the workplace, excluding exceptions
- Notify employer of intent to return to work in accordance with USERRA guidelines

Employer Responsibilities

- Allow military leave of absence
- Reinstatement employee promptly
- Restore employee seniority
- Reinstatement employment benefits
- Provide training or refreshing of skills
- Do not discriminate or retaliate

Progression of Employer Awards

- Patriot Award
- Spouse Patriot Award
- Seven Seals Award
- Above and Beyond Award
- Pro Patria Award
- Freedom Award
- Extraordinary Employer Support Award

What Are The Requirements?

- Notify your employer of your military service as early as possible
- Understand your rights and your responsibilities
- **Communicate**
 - Maintain open communication with your supervisor and human resources personnel on obligations
 - Keep in touch with the employer; let them know when you are returning
 - Provide your employer your unit commander's information for contact and emergency purposes
- Appreciate and / or recognize your employer
 - Show appreciation for what they do for you, even if a behavior is required by law (ESGR awards program)
 - If possible, invite your employer to see what you do (Bosslifts)
 - Be flexible on things that don't matter
- **Remember: You want your employer to hire other Service members if the experience with Service members is beneficial to both**

How Do I Get Help?

- 1st – Use your “chain of command” or contact your local ESGR Volunteer – Ed Mangan, emangan3@aol.com (602) 501-0128
- 2nd – Contact the ESGR State Committee
- 3rd – Contact ESGR National Headquarters
 - Phone: **(800) 336-4590, option 1**
 - Email: OSD.USERRA@mail.mil

Speaker: Director, Arizona Department of Veterans' Services – Col Wanda Wright, USAF, Retired

Col Wright stated that Arizona will be getting two additional VA homes; one in Flagstaff and one in Yuma. The groundbreaking for the Flagstaff home is scheduled for 1 June. The groundbreaking for Yuma is 22 June. It will take about 18 months before they open after the groundbreaking; 10-12 months to build and 6 months to get certification. Both the Flagstaff and Yuma homes will have 80 beds. They will be more efficient than the other homes. She also said she hopes that one will be built in Mohave County sometime in the future.

Col Wright stated some criteria for getting into a VA home. If 70% disabled, VA pays the entire bill. Admissions will work with the veteran if they are not 70% disabled. If 65 or over, Medicare can provide support. The VA homes have skilled nursing, hospice services, care for veterans with dementia or Alzheimer's.

Col Wright stated that more Veteran Benefits Counselors are needed. It would cost around \$1.2M for 12. She said she feels good that this amount will be awarded. She stated that more VBC's are needed in the rural areas such as Navajo.

Col Wright stated that Yuma and Mohave County would like to have Arizona Veterans cemeteries.

Col Wright stated that there will be another Veterans survey in the fall and asked all to participate. She said that almost 5,000 took the 2017 survey.

Col Wright talked about the Arizona Veterans Donation Fund. She stated that \$17 of each specialty license plate goes into this fund. There will be a license plate for woman veterans. This fund has about \$2 million, but about \$2 million is spent each year. They give \$250,000 for the stand down.

The ADVS will be going through a sunset audit to see if they will continue to exist. About a year from now they will get the report and if favorable, they will be kept alive for another 10 years.

Col Wright commented on the Advisory Committee and stated for the first time they have a full membership of nine members, of which, Col Kloeber is a member.

Col Wright stated that there would be a Woman's Summit on 14 and 15 June. There is no cost for the woman veteran unless they wanted to spend the night. The cost to spend the night would be \$100 for the room. There will be scholarships available to help cover the cost. There will be sixteen opportunities for breakouts. The location is the Tempe Mission Palms. They expect 300 – 500 women. They have received over \$40,000 in sponsorships. Check their website: AZDVS.gov for more information.

Col Wright's Presentation

About ADVS

- The Arizona Department of Veterans' Services is a state agency that serves and provides advocacy to service members, veterans and their families.
- Our Mission: To be the catalyst in response to the evolving needs of Arizona's veterans and their families.

Veteran Demographics

Veterans make up 10.8% of our population, ranking Arizona among the top 15 states with the highest concentration of veterans.

- All Veterans – 522,188
 - Wartime Veterans – 396,693
- Military Retirees – 56,239
- Veterans receiving disability compensation – 100,041
- Veterans receiving pension – 5,869
- Age distribution
 - Less than 40 – 68,966
 - 40 – 64 – 186,977
 - 65+ - 266,245
 - Male – 476,757
 - Female – 45,431

Military Demographics

- Active Duty
 - 19,000 service members
 - 5 Military Installations
 - Davis-Monthan Air Force Base (Tucson)
 - Fort Huachuca (Sierra Vista)
 - Luke Air Force Base (Glendale)
 - Marine Corps Air Station/Army Proving Ground (Yuma)
 - Camp Navajo Army Base (Flagstaff)

National Guard and Reserve

- 13,500 service members

Arizona State Veteran Homes

Arizona State Veteran Homes serve the long-term care and rehabilitative needs of the veterans of Arizona with energetic and caring staff who provide

- Nursing
- Therapeutic Recreation
- Social Services
- Rehabilitative, Physical, Occupational and Speech Therapy

Locations

- Phoenix – 4141 North S. Herrera Way, Phoenix, Arizona 85012, (602) 248-1550
- Tucson – 520 E. Ajo Way, Tucson, Arizona 85713, (520) 638-2150
- Flagstaff and Yuma
 - We will break ground on these facilities Summer 2019

Veterans' Services Division

- Veteran Benefits Counselors (VBC)
 - Virtual VBC
- Native American Settlement Fund
- Arizona Veterans' Memorial Cemeteries
- Arizona Military Family Relief Fund
- Hyperbaric Oxygen Therapy
- Veteran Tool Kit
- Tuition Waiver
- Arizona State Approving Agency
- Arizona Veteran Supportive Campuses

Veteran Benefits Counselors (VBCs)

- VBCs are accredited by the U.S. Department of Veterans Affairs and advocate for Arizona's service members, veterans and their families with receiving federal and state veteran benefits. VBCs also advocate for American Legion clients
- VBCs assist claimants by
 - Educating them on eligibility requirements for benefits
 - Processing VA compensation and pension applications
 - Appealing VA decisions
 - Representing claimants at VA hearings
 - Filing for survivor's benefits
 - Referring claimants to other agencies for potential benefits
 - Requesting military service records and certifying DD-214s (discharge paperwork)
 - Discussing State Veteran Benefits
- Virtual VBC

Veteran Benefits Counseling Offices

- Phoenix (2)
- Luke Air Force Base
- Mesa
- Maricopa
- Casa Grande
- Prescott
- Show Low
- Flagstaff
- Lake Havasu City
- Bullhead City
- Kingman
- Tucson (2)
- Safford
- Sierra Vista
- Yuma

VBCs travel to all 15 counties of the state. For a schedule, call 1-800-852-VETS (8387)

Native American Settlement Fund

- On November 22, 2000, the U.S. Justice Department issued a memo declaring that the taxation and withholding of state income taxes from active duty military pay of Native Americans domiciled on their reservation was impermissible
 - Arizona withheld state income taxes from all active duty military pay from September 1, 1993 through December 31, 2005
- The Native American Settlement Fund (NASF) was established on July 1, 2016 to refund Arizona income tax erroneously withheld from Native Americans who served in the military while claiming tribal land as their domicile
 - If the veteran is deceased, the surviving spouse or personal representative may make a claim

Arizona Veterans' Memorial Cemeteries

- Arizona Veterans' Memorial Cemeteries offer burials to all eligible members of the Armed Forces. For a fee, the veteran's spouse and qualifying dependents are also eligible
- Camp Navajo (North) – (928) 214-3473
- Marana (Central) – (520) 638-4869
- Sierra Vista (South) – (520) 458-7144

Arizona Military Family Relief Fund

- The Arizona Military Family Relief Fund (MFRF) provides financial assistance to the families of currently deployed service members and military and veteran families for hardships caused by the service member's deployment to a combat zone
 - For separated service members, this includes, but is not limited to, hardships caused by service-connected disabilities
- Eligibility Requirements
 - Deployment
 - Deployed to a designated combat zone
 - Arizona Residency (one of the three must apply)
 - Claimed Arizona as home of record while in service **OR**
 - Deployed with an Arizona National Guard or Reserve unit **OR**
 - Deployed from an Arizona military installation
 - Financial Hardship
 - Financial hardship must be related, caused or contributed to by a combat deployment
- Family members of those who were killed in action
 - May request up to six months in living expenses and other appropriate expenses as determined by the MFRF Advisory Committee
- Family members of those who were wounded in action
 - May request temporary living and travel expenses while care is being delivered to the qualifying service member
 - May request living expenses or other appropriate expenses as determined by the MFRF Advisory Committee
- Families of service members who are experiencing financial hardship
 - May request living expenses or other appropriate expenses as determined by the MFRF Advisory Committee to resolve an unforeseen financial emergency during the deployment of a service member or a financial hardship caused by deployment and to assist with the transition to financial stability
- The lifetime assistance limit for service members, veterans and their families is \$20,000
 - Applicants can receive emergency assistance of up to \$3,000 once in a lifetime

Hyperbaric Oxygen Therapy

- On March 29, 2018, Gov. Doug Ducey signed House Bill 2513 into law, appropriating \$25,000 to create a fund administered by ADVS and controlled by a committee to pay for hyperbaric oxygen treatment for veterans.
- We are in the beginning stages of creating this program

Veteran Toolkit

- The Veteran Toolkit Program provides supplies to unemployed veterans to help them begin a new job
 - For example, if a veteran is getting a job in the medical field and needs scrubs before they start, the program will buy the scrubs to make sure there are no barriers standing between the veteran and their new job
- Qualifying veterans must
 - Live in Arizona
 - Be enrolled in an ARIZONA@WORK employment program
 - Identify the job they need supplies for

Tuition Waiver

- The three eligibility criteria of the Tuition Waiver
 - Post 9/11 veteran who has a VA disability rating of 50% or more, received a Purple Heart medal and had Arizona residency established during military service
 - Dependent spouse and / or children up to age 30 of an Arizona soldier who was killed in the line of duty on or after 9/11
 - Post 9/11 Arizona National Guard members who were medically discharged or received a Purple Heart medal

Arizona State Approving Agency

- The State Approving Agency (SAA) is responsible for reviewing, evaluating and approving quality programs of education and training under State and Federal criteria
 - The SAA works with educational partners to fulfill its mission to
 - Promote and safeguard quality education and training programs for veterans
 - Ensure greater educational training opportunities to meet the changing need of veterans, and
 - Assist the VA in preventing fraud, waste and abuse in the administration of the GI Bill
- Arizona has over 17,000 GI Bill users
- The SAA has approved over 400 state institutions to accept GI Bill benefits

Arizona Veteran Supportive Campuses

- The Arizona Veteran Supportive Campus (AVSC) program is intended to address the unique needs of veterans, service members and their families on campuses
- Certification ensures institutions understand the needs of their military and veteran students and are continually responsive to those needs
 - In order to be eligible for certification as a AVSC, an institution must be certified as eligible to receive GI Bill educational benefits

Arizona Veterans' Donation Fund

- The Arizona Veterans' Donation Fund (VDF) assists programs and initiatives that benefit veterans and their families. The VDF supports Arizona's veteran community through small grants (\$4,999 or less) and large grants (\$5,000 - \$75,000), each with their own application process
- More than \$1 million granted last fiscal year to support the veteran community
- Funds come from tax-deductible charitable donations and the purchasing of Veteran, Women Veterans or Freedom Arizona license plates
 - Purchase at www.ServiceArizona.com

Arizona Gold Star Military Medal

- The Arizona State Legislature has created the Arizona Gold Star Military Medal to honor Arizona members of the Armed Forces of the United States of America who have been killed in action since Arizona became a State on February 14, 1912
 - The families of qualifying individuals must complete the application form on our website
- ADVS performs ceremonies for each Gold Star Military Medal presented

Arizona Roadmap to Veteran Employment

- The Arizona Roadmap to Veteran Employment, developed by ADVS and the Arizona Coalition for Military Families, is a comprehensive statewide effort that focuses on connecting veterans, service members and family members to employment opportunities and resources
 - Includes options for job seekers, employment service providers and employers
 - <http://arizonacoalition.org/employment/>

Arizona Action Plan to End Homelessness Among Veterans

- We take seriously the challenge of assisting homeless veterans to find safe shelter where possible
- The Arizona Action Plan to End Homelessness Among Veterans began in 2010 – we've seen success, but there's still work to be done
- ADVS and the Arizona Housing Coalition are collaborating to institute three key goals and 26 regionalized objectives to sustain efforts to end homelessness among veterans in Arizona
- Goals
 - End street / shelter homelessness among veterans
- Transform the temporary help system
 - Strategy: Coordinate a plan for grant and per diem (GPD) programs to adopt new models of care with the capacity of ending street and shelter homelessness
- Ensure ongoing system functionality for all veterans experiencing homelessness
 - Strategy: Ensure statewide systems for veterans experiencing housing instability include prevention with a balance of affordable housing and supported housing

Be Connected

- Arizona's statewide program focused on connecting service members, veterans, their families to information, support and resources
- CALL – Help and support available 24/7
 - A veteran, family member, or someone in the community can call 1-866-4AZ-VETS to obtain resources, seek advice, or reach a crisis specialist for immediate assistance
- MATCH – Personalize Resource Matching & Navigation
 - People can explore and be matched to over 1000 resources at: www.ResourceCommand.org
- LEARN – Training and skills to equip yourself to help
 - Be Connected also provides in-person and online training so everyone can learn the knowledge and skills to help. Visit: www.BeConnectedAZ.org

Important Contacts

- **Arizona Department of Veterans' Services:** www.azdvs.gov or 602-255-3373
- **Be Connected:** www.BeConnectedAZ.org or 1-866-4AZ-VETS (429-8387)
- **U.S. Department of Veterans Affairs:** www.va.gov
- **VA Call Center for Benefits:** 1-800-827-1000
- **VA Health Care:** 1-877-222-VETS (8387)
- **Veterans Crisis Line:** 1-800-273-8255, Opt. 1

New Business

Committee Module – Col Peter Kloeber

Critical for Councils, Chapters... and MOAA

- Official Roster – MOAA's only Visibility
- Council President (MOAA Communications)
- Other Officers, Board, Staff and Committee Positions
- Levels of Excellence (LOE)
- Recruitment Bonus
- Retention Bonus
- Percent MOAA Members
- Lapsed Membership / Non-MOAA Members
- Contact Information

Status / Use

- Not Perfect – But a Lot Better Than Previous: Nothing!
- 286 Chapters Using (out of some 400)
 - Arizona = Council and ALL Nine Chapters
 - MOAA says AZ is the “best”

A Few Hints

- ALL individuals MUST be shown as a “Member”
- Leader Succession
 - If entered “End Date” for leader...enter “Start Date” for successor
- Non-MOAA Members
 - “View All” then Click on “Membership” – puts all “Blanks” at top
- Number or % of membership categories (Life, Premium, Basic)
 - “View All” then Click on “Membership” – sorts by membership category
- Duplicate Records
 - “View All” then Click on “Last/First Name” – sorts by name
- DO NOT
 - Include “End Date” for “Member” unless deceased or removed from Chapter
 - Delete / Replace Officer or Committee Positions

Satellite Chapters

- Satellite Chapters have own CM
 - Must identify President and Membership (or 2nd Administrator)
- Host President and Membership Chair can have access
 - Contact MOAA C&C to request

Access to CM in Addition to President & Membership (e.g., Future President)

- MOAA already has capability for officers to access CM as read-only on a case-by-case basis
- Succession plan in place and knowledge of next president or membership chair
 - Contact MOAA Councils and Chapters
 - Will grant access to incoming president and / or membership chair
- MOAA policy: Two administrators per chapter (primary & backup)
 - Default is Membership Chair and President
 - Chapter can substitute any other combination by contacting MOAA Councils and Chapters

Creating a Position Not Shown in the CM

- MOAA has received such requests and extended titles to the max
 - Difficult to cover all unique titles for over 400 chapters
 - Currently 30 position titles available
- For positions with titles not in the CM
 - e.g., Historian, ESGR, Recording Secretary, Asst. Treasurer, Co-Secretary, etc.
 - Use one of the available “Vice Chair” positions
- Contact MOAA Councils and Chapters
 - Give member name and specific title desired
 - MOAA will add to the members’ “note” section of his / her record

Adding Spouses in Leader Positions

- Enter spouse email in “Add Committee Member”
 - Handle like adding any member to leader position
- If spouse email is NOT in system
 - Contact MOAA Councils and Chapters (call or email chapters@moaa.org)
 - Will add spouse email to system
 - Email must be different from member spouse
- Proceed with handling as any other member

Adding Non-MOAA Members

- MOAA.ORG / Councils & Chapters / Committee Module / Add Non-MOAA Members to Your Roster
 - <https://fs20.formsite.com/moaaweb/ChapterRecruiting/index.html>

Recommends to MOAA

- Add column for Customer ID number
- Provide “Read-only” access to Council President and Membership Sec
- Add column for Expiration Date of MOAA membership
- Provide ability to distinguish between Host and Satellite Chapters
- Change name of CM
- Provide ability to correct / update members’ contact info

Help / Instructions

- Committee Module Instructional Guide Version 2.0
 - MOAA.ORG / Councils & Chapters / Committee Module / Committee Module 2.0 Instructional Guide
 - [https://www.moaa.org/uploadedfiles/content/chapters_and_councils/committee%20module%202.0%20instructional%20guide\(1\).pdf](https://www.moaa.org/uploadedfiles/content/chapters_and_councils/committee%20module%202.0%20instructional%20guide(1).pdf)
- MOAA C&C Will Conduct Training Webinar
 - Call Daniel Slattery – 800-234-6622, ext. 168

Chapter Position Responsibilities Guide – Lt Col Nicholas Knight

Lt Col Knight stated that the Chapter Billet Responsibility Guide, Version 5 is being updated and will contain the Committee Module. He said he will be sending the prior version to the chapter presidents for their input to create Version 5.

Lt Col Knight stated that he is currently working on an electronic version of the AZCOC newsletter which will be put on the AZCOC website.

Chapter & Satellites Semiannual Updates

Yuma Chapter

Leadership Succession

- Our current plan, which admittedly isn't much of a plan, is for myself & Jim Adler to swap the President & Vice President positions between us biannually
 - No members I've spoken with recently have expressed any desire to fill either of those positions or voiced any concern over the current plan

Membership

- Numbers: 37 Regular & 8 Surviving Spouses
- Recruitment: Our past recruiting letter approach is not producing any results: we will be widening the net in the next mailing cycle
- Retention: No gains or losses this period

Successes

- Scholarship Donations: Our Graduating Senior Scholarship fund met the \$1,000 donation on time with no individual donations exceeding \$100
- Spring Community Project: Initial collections to Right Turn for Yuma Veterans produced over \$350 & six boxes of household goods

Challenges

- Local Demographics: Young officers that EAS don't stay in Yuma, they go somewhere they can best start their second career
- Member Participation: Those once willing & able are now either willing but unable or have declined to the point of unwilling & unable

Program / Activities

- On 14 Nov eight chapter members visited with 34 in-patient veterans at four Yuma area nursing homes / rehabilitation centers & presented each a unique lap quilt created locally by the Friendship Quilters

Legislative Activities

- No activities this period. Our new Legislative Liaison is still learning the extend of the job; we will have something of note to report next meeting

Goals

- Recruit an equal or greater number than we lose to attrition

Tucson Chapter

Leadership Succession

- Transition in process; after 7 years as president
- Difficult to find new leaders who will step up
- Several current officers have served for many years

Membership

- Numbers: Regular: Tucson – 63; Catalina Mountains – 29; SSAC – 19; Total – 92
- Recruitment: 3 in last quarter
- Retention: Lost 3 members

Successes

- Another 5-Star LOE; 12 continuous years since 2006
- Political Candidates Luncheon: 14 participants, good exchange
- ROTC program medals and scholarships

Challenges

- Leadership succession
- Fund raising ideas

Noteworthy Programs

- ROTC awards and scholarships
 - 4 JROTC high schools, medals & certificates, ceremony presentations
 - U of Arizona: Army, Air Force and Navy units; scholarships

Esperanza En Escalante: homeless veterans' organization

- Community partnership
- MOAA member of their Board of Directors

Goals

- Strive for another 5-Star LOE
- Recruit new Board officers; 1 just started as Membership Chair

Other

- ESGR joint meeting
- Honor Flight presentation
- Esperanza En Escalante (homeless veterans' organization)
- DMAFB: annual visit to a unit of interest

Catalina Mountains Satellite

Leadership Succession

- Slate of new Satellite Officers elected in January 2019

Membership

- Numbers: 31 (29 Regular and 2 Surviving Spouses)
- Recruitment: Participated in SaddleBrooke Ranch Expo – Feb 2019 (7 signed up as interested – contact made with each after Expo)
- Retention: 10% growth rate in membership numbers since last year AZCOC

Successes

- Guest speakers tentatively booked through end of 2019
- MOAA Certificate of Appreciations given to each guest speaker and MOAA Certificate of Achievements given to members for special occasions

Challenges

- Limited zip codes to recruit
- Not in closer proximity to a military base

Programs / Activities

- Elected Officers interactive with other local Veteran Groups

Legislative Activities

- Update about AZ Military Retiree pay tax exemption provided to Satellite Chapter by one of our members

Goals

- Add 2 – 5 new members

Superstition Mountain Chapter

Leadership Succession

- I am in my first year as president. The plan is for me to have at least one more year in the position
- At that point, we will determine who will step forward to lead the chapter

Membership

- Numbers: Regular – 102; SS – 23
- Recruitment: using the list from National and personal contact to find new members
- Retention: email reminder to all members in Oct / Nov, newsletter articles by 2nd Vice, and follow-up letter in Mar to those who have still not renewed

Successes

- Funding to match a veteran and dog to be trained as a service dog for the Vet with PTSD
- Our Auxiliary / SS group continues to build hygiene kits for the VA Service Center to distribute to needy vets. Additionally, they made more heart pillows and donated them to Hospice of the Valley to use in their children's grief groups. Finally, they provided Last Call blankets to the VA Hospital as a final tribute to vets who have passed

Challenges

- Recruiting – list from National has bad addresses and phone numbers

Programs / Activities

- Excellent participation by members to ensure we have a presenter at all of the 21 ROTC / JROTC units to hand out the flag, medal, and \$100 award to deserving cadets

Goals

- Membership retention of 95%

Central Arizona Satellite

Leadership Succession

- As a satellite of the Superstition Mountain Chapter, CAS reports directly to SMC Chapter and follows the succession plan of the Chapter
- Stable succession of the Satellite is achieved by maintaining current leadership, until we can meet the goals for being an independent chapter
- CW04 (R) Harold Fales will continue as the President of the Satellite until the Satellite becomes a fully functioning Chapter. This is necessary because many of the members are also winter visitors. The same process applies to other leaders of the Satellite

Membership

- Numbers
 - Members may also be members of home MOAA chapters
 - Many members are winter visitors to Casa Grande and other Central Arizona communities
 - Approximately 13 regular members
 - Active Duty, Reserve, National Guard and USPHS typically do not join

- Recruitment
 - Membership recruiting generally failed when using direct phone or mail contacts, especially using MOAA provided contact data by area code. Data was incorrect, obsolete and did not provide recent, eligible potential members
 - Most effective recruiting method was to build a community support network (i.e., association / membership with Chambers of Commerce, community activities, etc. Attending community and municipal events, e.g., garden shows, cook-offs) generated more interest and better prospective member data
- Retention
 - Does not appear to be an issue

Successes

- Casa Grande Home, Health and Garden Show / Car and Truck Show (January)
 - Over 2,000 visitors to all events. JROTC and veterans' organizations participated. Sponsored by the Casa Grande Chamber of Commerce at City Gate (former Tanner Outlet Mall) near I-10 exit on southwest side of Casa Grande
 - Generated through visitor networking, numerous contacts, of MOAA, networking with veterans and veteran groups a source for potential members
 - JROTC Display Ads in C of C Business Directory / Community Guide and CG Dispatch (2X weekly) Newspaper
 - 3,800 Visitors Guides distributed annually by Chamber of Commerce, and CG Dispatch sent to 11K subscribers / month
 - Ads announce month meetings for CAS and directions for location
 - The Wall That Heals – coming to Pinal County – 2019, Thursday, March 7 to Sunday, March 10
 - CAS Members provided guides for visitors to locate names / tablet locations on the replica wall that was assembled at the Dave White Municipal Park in Casa Grande
 - Used the opportunity to network, provide information about CAS meetings and membership
 - Sponsored by VFW, American Legion, Elks Club and Vietnam Veterans of America

Challenges

- Membership Sustainability
 - Although CAS continues to generate contact information and new members, we do not get contacts that convert to regular membership to the degree that we need to provide growth to full chapter status
 - Part of the problem is potential members display initial interest, but do not follow through on joining
 - Other members are not full-year residents and cannot participate on a year-round basis, thus leaving a small number of members to do the lion's share of work

Programs / Activities

- Officer Thomas Anderson (PIO-CGPD) and Volunteer Coordinator Wendy Lloyd presented information on how to protect members from telephone and computer scams. This was particularly relevant since scams are more often directed toward senior citizens, which represents a number of our CAS members
- The presentation included materials provided by the Federal Trade Commission, CGPD, and a new mobile app to the CGPD
- Advice was provided to members on how to avoid, report and safeguard against protecting vacant homes while returning to another resident locale (winter visitors), when to hang up on telephone and computer scams, responding to unknown callers, etc.

Northern Arizona Chapter

Leadership Succession

- President Northern Arizona Chapter (NAC) – LCDR Clyde Meade, USN (coming up on last year)
- President Mohave Satellite – COL Gerald Hietpas
- President Rim Country Satellite – Vacant
- Vice President NAC – LTC Gordon Rohn, USA
- Secretary, Legislative Affairs, ESGR NAC – COL George Weil, USAF
- Treasurer NAC – Mrs. Sharon Douglas, CIV (Surviving Spouse)
- Personal Affairs NAC – Lt Col Bob Wallace, USMC
- Membership NAC – Lt Col Dick Jonas, USAF

Membership

- Northern Arizona – Regular 55, Surviving Spouse 23
- Mohave Satellite – Regular 11, Surviving Spouse 11
- Rim Country Satellite – Regular 7, Surviving Spouse 7

Successes

- Yavapai County Stand Down – first planning meeting 24 April
 - Clothing donations (started in April)
- Food donations from our luncheon meetings
 - Meals – over 210 to homeless veterans last 6 months
- Groupworks.com
- Ladies of NAUMOAA
 - By-monthly lunches
- Veterans Day Parade
- Chapter Donations / Support
 - Scholarships to 2 ROTC and JROTC programs
 - Adding new JROTC Army Bradshaw High School for 2020
- Support to Athletic Courts at VA Hospital
- LOE 5-Star Award – (6th)

Challenges

- Chapter Membership
 - NAC – remains steady, gains and losses seem to balance out
 - Meeting going strong, speakers; military / non-military topics, themed quality lunches
 - Teleconference Test Program
 - Mohave – no significant gains
 - Rim Country – showing life – looking at branching out to the Show Low / Pinetop area
 - Recent meeting success; add 6 members (4 regular, 1 surviving spouse and 1 Aux)
- Volunteerism
 - Limited to a very small group
 - Searching on how to get others to engage!
- Visualize the Big Picture
 - Model the Way
 - Think Outside the Box
 - Receive Honest Feedback
 - Lead the Change
 - Challenge the Process

Legislative Activities

- Educating our membership by Group Works Social Platform
 - Brief the NACMOAA Board Members and membership on the “HOT BUTTON” Legislative topics
 - We monitor legislative activities and advance public policies that will benefit the Military member and / or Veteran
 - Review bills that are being passed through the process through Legislation trackers (for example; Gov. Track, azleg.gov, etc.)
- Sending email messages and meeting our Senators and Representatives
 - Getting our members to TAKE ACTION on MOAA issues
 - Getting the MOAA brand out and creating a voice for our brand to our Legislators
 - Crafting and building a stronger relationship with our Legislative Personnel
- Tracking What Matters
 - Reviewing and tracking Legislation that affects us
 - Storming the Hill from our computers
 - Being part of the process

Goals

- **Revitalize Satellite Chapter (Rim Country)**
- More Aggressive Chapter Engagement
- Fill Chapter Leadership Positions
- Grow our Future Leaders
- Seek Further Community Opportunities

- Build Stronger Relationships within the Community
- Activate a Long-Term Strategic Planning Team
- Long Distance Teleconferencing Platform

Other

- US Vets
 - Stand Down – over 4+ years support
 - Homeless Clothing Drive
 - Meals – over 420 for homeless veterans
- **Pickleball Tournaments Chapter Sponsorship**
- Honor Flights
- “We Honor Veterans”
- Mohave setting up a fund for a local veteran
- Veterans Day Parade
- 50 / 50 VA support

Mohave Satellite – report included in Northern Arizona Chapter report

Rim Country Satellite – report included in Northern Arizona Chapter report

Luke Chapter

Leadership Succession

- COL Jerry Wojtas – Director, Leadership Succession Committee
- All Luke Chapter elected officer positions currently filled
- Recent changes for 2019 – 20 program year
 - President – Bob Nelson, LTC, USMC, Ret.
 - 1st Vice President – Dennis DeFrain, LTC, Ret. – Dir. of Programs
 - 2nd Vice President – Marci Smith, MAJ, USAF, Ret. – Dir. of Membership
 - 3rd Vice President – Don Fordney, CW03, USN, Fmr. – Dir. of Scholarship Pgm
 - Treasurer – Robert Coutchie, COL, USA, Ret.
 - Secretary – Judy Nelson (spouse of Bob Nelson)
- We will fill appointed director vacancies – COL Wojtas

Membership

- Numbers

	<u>Sep 2017</u>	<u>Sep 2018</u>	<u>May 2019</u>
○ Members	199	186	176
○ Surviving Spouses	39	38	39
○ Honorary	3	3	3
Total	242	227	218
- Recruitment
 - New members since September 2018: 24
- Retention
 - Net losses since September 2017: About 24

- Reasons for losses include moving from area, death, health problems, nursing home, losing interest and ability to attend

Successes

- Scholarship Fund
 - Donations increased substantially; currently hold @ \$92,000 in account
 - Funds allow increase in charitable gifts to other veteran causes
 - Awarded twenty-three scholarships in April 2019, totaling \$34,000
 - Awarded sixteen scholarships in April 2018, totaling \$24,900
 - Pursuing local businesses successfully, corporate donors often repeat
- Community Fund (MFI) grants to needy vets and families
 - MOAA and HFH grants of \$6,250 in 2017 and \$3,750 in 2018
 - MOAA awarded \$5,000 in April 2019; we will add \$1,250 = \$6,250
 - Established a committee, process for identifying and vetting potential donees, Board approval, admin procedures to comply with grant conditions

Challenges

- Reverse current trend of net loss in membership annually with marketing plan for recruitment of MOAA members
 - Investigating use of MOAA's tool for membership recruiting / renewal
 - Set up a 'meet and greet' reception
 - Briefing by internet / web marketing expert with ideas to recruit younger members through social media
 - Advertise directly in development email groups
 - Work with Luke AFB Retiree office to solicit recruits
- Find new ways to interest members in joining board

Programs and Activities

- Initiated Luke Chapter Spouses Club
 - Goal is to increase involvement and commitment of both surviving spouses and current spouses
 - Plan to focus group on periodic noon luncheons, activities, trips to interesting places, etc.
 - Focus item will be support to future fund raising activities
 - Plan to meet at least quarterly

Legislative Activities

- COL Phil Hansen, Director, Legislative Liaison
 - Phil was an Arizona state assembly person
- Provides monthly report to Luke Chapter on legislative and regulatory actions, bills and laws; newsletter articles
- Supported lobbying effort to increase military retirement income exempt from AZ income tax from \$3,500 to \$10,000; the bill died this year

Goals

- Achieve Five Star LOE rating for Luke Chapter for 2018
 - Five Star Harris Communication awards for both NewsGram and Webpage for calendar 2018 awarded in April 2019
- Increase chapter membership by ten percent to at least a net 250 members
- Distribute Community Fund grant appropriately under MOAA guidelines
 - Awaiting decision on AZ DMA grant request for \$5,000
- Develop and implement a dynamic marketing plan for recruitment of national MOAA members in our area currently unaffiliated with our chapter

Other

- Fundraising Methods
 - Start early in calendar year with planning (mid-January)
 - Write news release with pictures for local newspapers and shoppers
 - Cultivate a relationship with local businesses
 - Get to know the executives who make the charitable grant decisions
 - Invite them to send two representatives to the award dinner
 - Display banners with corporate logos on the wall for PR value
 - Telephone call to the executive thanking them personally
 - Post corporate donors on the webpage, and advert in monthly NewsGram for exposure
- Foster climate of generosity in chapter; “drip irrigation” messaging
- Make the fund-raising auction / silent auction fun!

Green Valley

Leadership Succession

- The Green Valley Leadership Succession is as stated in our bylaws, revised last year to include spouses holding Board positions
- We hold annual elections, but expect most presidents to hold that position for 2 years
- The past president goes to the 501 (c)3 Director and is available to help incoming president
- We try to expose upcoming presidents to the AZCOC and MOAA regional meetings

Membership

- Numbers

	<u>May2018</u>	<u>May 2019</u>
○ National Members	71	75
○ Aux Members	11	12
○ Surviving Spouses (Incl. in Total Members)	<u>6</u>	<u>5</u>
Total	82	87
- Recruitment
 - New members since May 2018: 5
- Retention

- Losses since May 2018: 4
- Reasons for losses include moving from area, death, health problems, nursing home, losing interest and ability to attend
- Viable, declining membership, but getting older (average age 75+). Not an expanding community
- 10 – 15 active members, for BOD, working functions, that we can call upon to do things

Successes

- Finances are healthy!
 - Thanks to our work with JROTC units, Honor Flights to D.C., and the Veterans in the area, community donations are very healthy
 - Thanks to Dick Newman and his “Grant Writing” ability, and having the next year’s planned expenses paid for a year in advance
- We have a full Board of Directors
 - For the first time in several years
- We have successfully recruited younger couples
 - Younger people are stepping up to serve (if you consider 60 as ‘younger’)

Challenges

- Challenge 1: Scholarship funding is becoming harder to get, because the perceived image of universities and colleges, has fallen by 50% in the last 3 – 4 years, among Corporate donors
- Challenge 2: Anyone with ideas for recruiting and retaining younger members in Chapters that are 90% retirement age would be great
- Challenge 3: Almost all the active members have served on the BOD 5 – 10 years
- Challenge 4: Communication via smart phones is really providing a major problem with the older generation. We have found iPhone and Android users are being hit by the autonomous ability to classify email messages into “Focused, Other, Spam, etc.” categories, depending upon interest shown by the user. WITHOUT telling the user. We have individual tutoring through our webmaster for smart phone users.

Programs

- We tried getting active duty to join, did have some success, only to have them transfer out of area
- We have gained more visibility through Chamber of Commerce, newspaper reporting (our PR person keeps pumping out articles to the newspapers), etc.
- Our biggest attraction is the support we give the JROTC units, including a NRA Grant for a ‘Proper Shooting Range’ for one of our JROTC HS’s – we get very positive responses!!

Legislative Activities

- We supported the AZ tax rebate last spring, contacted our State reps via phone, email, etc.

- Dick Newman was instrumental in producing one paper used in the AZ tax rebate legislation
- John Chernoski, former President in Green Valley, took part in Storming the Hill in Washington, and keeps us advised in legislative matters
- Martha McSally, US Senator, Arizona, is a chapter dues paying member. We contact her almost monthly

Goals

- Membership Retention
 - Getting younger members involved
- Maintaining adequate funding / donor base
- Working toward LOE, Communication Awards
- Providing for our own members 'First'

Grand Canyon Chapter

Leadership Succession

- Elected Positions: president, 1st vice president, 2nd vice president (2-year terms) and three directors (3-year staggered terms), all MOAA members
- Appointed Positions: secretary, treasurer (2-year terms) and committee chairs are appointed with approval of the board of directors

Membership

- Numbers: 129 (123 regular; 6 surviving spouses)
- Recruitment: 5 since 1 January (15 in 2018)
- Retention: 99% (100% MOAA members / 54% life)

Successes

- Applied for and received \$4,999 from Veterans Donation Fund (Arizona Dept. of Veterans Services) to help fund VA Formerly Homeless Program
- Increased visibility in community

Challenges

- Recruiting base
- Marginal member participation

Programs

- \$7K donated to VA Formerly Homeless Veterans and their families during holiday season

Legislative Activity

- Personal contact with CD1 Representative and LD6 State Representative

Goals

- Expand VA Formerly Homeless Veterans Program to year-round support

Other

- Four \$750 scholarships (NAU Air Force Cadet, NAU Army ROTC Cadet, NAU Student-Veteran, CCC Student-Veteran)

Coronado Chapter

Leadership Succession

- The leadership succession plan for the Coronado Chapter has been successful since 1973.
- We elect a president and a 1st and 2nd vice president. In the past the 1st vice president is elected to the position of president at the end of the president's term. Recently we have had exceptions when a member of the board of directors has been selected as the new president.
- A number of officers and directors are long-term office holders, thus contributing to leadership stability and general institutional knowledge

Membership

- Numbers: 134 Regular Members and 26 Surviving Spouses
- Recruitment: In partnership with MOAA, the Coronado Chapter recognizes the Honor Graduates of Officers' Courses at Fort Huachuca. We also gained several members after a mail out from National MOAA went out to non-chapter members advertising our MOAA National speaker. We have several programs that give us visibility to the military and community, among them our Five-Star Website / Facebook and newsletter, The Heliogram
- Retention: When we send out our newsletter through email, we include a short message indicating the date their local membership expires. Each newsletter has a membership renewal form to make renewing easier. We send out a reminder in February to members who have not yet renewed and later assign Chapter Officers to call each overdue member

Successes

- Scholarship Program
 - Our membership raised over \$11,000 last year to give ten scholarships to area High School Seniors. We are on track to possibly raise as much this year. We endeavor to give at least one scholarship to a JROTC student in each of our two high schools with a JROTC program.
- Distinguished Leaders and Honor Graduate Membership Awards

- Our past president, COL Bob Covalucci, (Ret.), began a program in which MOAA awards three-year premium memberships to Distinguished Leaders and Honor Graduates of Fort Huachuca's Military Intelligence Officer and Warrant Officer Courses. This program is supported by MOAA National and is an opportunity to expose several hundred officers and warrant officers to the MOAA Organization, Programs, and Goals each year

Challenges

- Membership
 - We have lost more members to death and moving away than we have been able to add in the past year. The programs and methods we are using to reach new members have already been mentioned, and our membership committee is continuing to look for new ideas
- Surviving Spouse Participation
 - We have a great program for our surviving spouses every year, which is put together by our surviving spouse liaison. This year only about a third of our surviving spouses attended. Unfortunately, our surviving spouse liaison recently resigned due to health problems

Programs

- We continue to increase our visibility in Sierra Vista in several ways. We furnish the cake for the Sierra Vista Veterans Day Celebration each November. It is cut in a ceremony at the Sierra Vista Veterans Memorial Park, which is cohosted by the city and Fort Huachuca. We also have a float and Allen Rossow's vintage jeep in the Veterans Day Parade with MOAA banners displayed for all to see. We had about 9 people on the float last year
- Our public relations director quarterly organizes a cleanup of one of the more visible streets in Sierra Vista and the city has placed a sign recognizing our efforts. Our Five-Star Website / Facebook and newsletter, the Heliogram, also give us visibility

Legislative Activity

- Colonel Gene Fenstermacher, USAF (Retired), sends "action" email blasts to chapter members, potential chapter members, retirees and other veterans. He partners with State Veteran Advisory Commission and local and state-level United Veterans Councils to keep them informed. He sends or emails chapter newsletters to elected political leaders
- He provides chapter newsletters and emails that contain legislative-alert information and also requests for members to send in MOAA-suggested messages
- He provides copies of MOAA's *Legislative Update* and *News Exchange* to state and federal legislators to educate them on issues that affect the military

Goals

- We hope to increase membership by 5% in the next year

Other

- Our program director planned exceptional monthly speakers in 2018. We all became more aware of programs and actions being taken in our community for our health, well-being and veteran issues
- In January, our County Sheriff, Mark Dannels, shared the great job our Sheriff's Department is doing. Next, Sierra Vista Mayor and MOAA member, Rick Mueller, spoke on the current status of everything from street repairs and new businesses, to changes at Fort Huachuca that could affect our city in the future
- In April we honored our scholarship recipients; what a talented and dedicated group of young people! In May we had a very informative presentation by our Supervisory Border Patrol Agent (SBPA) Sean Ludden. He addressed issues, statistics, concerns and successes
- In September, Tony Boone, Past Garrison Commander, and Economic Development Manager for Sierra Vista, updated us on West End development and efforts to increase tourism and positive interaction with our Mexican neighbors
- Next, Steven Sample, Assistant Director, Southern Arizona VA Health Care System, updated us on many positive changes in the Veterans Administration. They are tackling Customer Service issues head-on and seeking feedback after VA appointments
- In November, Margaret Hepburn, Chief Executive Officer of the Legacy Foundation of Southeast Arizona, shared the history, partnership, and the wide variety of grants they offer, while promoting health and community wellness. In December we enjoyed a Christmas / Hanukah concert, a delightful way to finish our year of meetings

Arizona Chapter

Membership

- From the start of 2019 AZ MOAA has improved
- The current membership is 151 members
- 2018 showed a gain of 15 new members with 2 more in 2019 – so far
- Through an aggressive member dues renewal mail campaign, out of 68 delinquent payments, 32 responded positively. There is a trickle of past due dues still coming in

Challenges

- Membership retention is a continual challenge
- Keeping the interest of the members in mind is being made to increase retention through social events and timing of events
- Finding new members is currently through the National MOAA potential list or word of mouth
- Other means for recruiting are being explored such as the social media

Programs and Activities

- Identifying the Military Officer's interest in activities is critical for recruitment and retention, especially for the 0-4 and below ranks

- Our work in this area has been through the creation of a social committee
- Family events are now being researched

Successes

- ROTC scholarships have been an annual success. Maintaining a fund to cover the monetary reward for student performance makes this annual event a success
- This year a social committee was established which resulted in events becoming popular amongst the membership, hence retention:
 - Happy hour
 - Baseball game
 - Dolly Steamboat cruise on Canyon Lake

Legislative Activities

- The monthly Sentinel newsletter has a column that addresses the latest events in the State and Federal Legislations
- The article is informative as to what is happening
- More important is what we as members can do to help improve things through letter writing, etc.

Goals

- Dream for 2019
 - Recruit new younger members to bring the membership up by 15 new members
 - Reduce the average age of membership

A motion was made by COL Jerry Wojtas to adjourn the meeting. It was seconded by Col Tom Owens. Meeting adjourned at 1530.

Respectively submitted,

Pam Wojtas
 AZCOC Secretary
 Phone: 623-544-4477
 Email: jp7wojtas@gmail.com

Action items:

A question was asked: “Of the 21% MOAA members who are “Currently Serving” – what is the breakout by Active, Guard, and Reserve?”

A question was asked: “Do you know the success rate of people getting jobs from the job postings, job fairs, or resources which are available?”

FUTURE STATE COUNCIL MEETINGS HOSTS:

Fall 2019: Green Valley

Fall 2020: Tucson

Fall 2021: Superstition Mountain

Fall 2022: Luke

Fall 2023: Grand Canyon

Spring 2020: Coronado

Spring 2021: Northern Arizona

Spring 2022: Yuma

Spring 2023: Arizona