



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

0900 Hours, Friday, 5 November, 2021

VIRTUAL MEETING HELD DUE TO CONTINUED COVID PANDEMIC

IN ATTENDANCE:

Arizona Council of Chapters:

President and National MOAA BOD:

Col Peter Kloeber

Vice President & Newsletter Editor:

Lt Col Nicholas Knight

Secretary and Membership: Mrs. Pam Wojtas

Treasurer: Col Charles Bitner

Legislative Affairs: Lt Col Darren Venters

**Surviving Spouse Advisory Council and
President Northern Arizona Chapter:**

Mrs. Sharon Douglas

Immediate Past President and Chapter

Development: Lt Col Dick Jonas

Past President: Col Gary Fredricks

President: MAJ Pete Berger

President: Chaplain (COL) Tom Day

1st Vice President: LCDR Jim Clenney

President: LTC Steve Jarvis

Assistant Membership Chair:

Lt Col Joyce Kloeber

2nd Vice President: CAPT Judith Maeda

1st Vice President: 1LT Elliot Jones

President: LTC Dennis DeFrain

President: Lt Col John Bushko

Treasurer & Membership Chair

COL Gary Pettett

President: James Alder (virtually)

1st Vice President: CAPT Chuck Vaughan

Arizona Chapter:

Coronado Chapter:

Grand Canyon Chapter:

Green Valley Chapter:

Luke Chapter:

Superstition Mountain Chapter:

Tucson Chapter:

Yuma Chapter:

Catalina Mountains Satellite:

Administration

Call to Order: Col Peter Kloeber called the meeting to order at 0904.

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.

President's Opening Comments / Into of Guests – Col Pete Kloeber

- Col Kloeber welcomed everyone to our virtual meeting and thanked them for attending.
- He stated that originally, we were going to have an in-person meeting at The Colonnade. LTC Steve Jarvis asked if the Council meeting could be tied in with the Southwest Leadership Meeting taking place in San Diego on 19 and 20 November since so many of the attendees to the Council meeting would already be in San Diego. Col Kloeber said he checked and there was a problem with getting a room because of the late asking. He also said that it would have meant some coming earlier or staying later depending upon the scheduling of the Council meeting. He also stated that instead of making Council Representatives drive to two different meetings only two weeks apart that the Council meeting would be virtual.
- Col Kloeber stated he plans to ask Col Wanda Wright to be the speaker at the May Council meeting since the last time she addressed the Council was May 2019. He also stated that by then the two new Veteran Homes, Flagstaff and Yuma, should be open and Col Wright could give a presentation on both of them.
- Col Kloeber stated he plans to invite Lt Gen Dana Atkins to be the guest speaker at the November 2022 Council meeting.
- Col Kloeber stated that today's Council meeting will be similar to past Council meetings with the exception of no chapter updates. He stated that during the round table discussion, chapters were invited to give updates if there was something they wanted to share that their chapter had been doing.
- Col Kloeber reminded the chapter presidents that this meeting is for them and to please share information with the other members of their chapter.
- Col Kloeber said that Mrs. Pam Wojtas would be sending all the presentation slides to everyone attending today's meeting. He also stated that she had already sent the presentations for personal affairs and transition.
- Col Kloeber stated there would be three votes today. He reminded everyone that voting members are Council Officers, Chapter Presidents or their representative, and Past Council Presidents.

MOAA Awards – Col Pete Kloeber

Col Kloeber said he is very proud that Col Lee Lange and Mrs. Sharon Douglas were honored at the MOAA awards dinner. He stated that when Col Lange was presented his award there was an arousing round of applause from the crowd. He stated that Col Lange had been associated with MOAA for a number of years and was well known at National MOAA.

Col Kloeber congratulated Mrs. Douglas and stated he will attend a Northern Arizona Chapter meeting to present her award.

Col Kloeber presented two slides; one showing Col Lange receiving his award at the awards dinner and the other a picture of Mrs. Douglas. Pictures included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

MOAA Levels of Excellence Awards – Col Pete Kloeber

Col Kloeber stated there were no 4-star awards this year, only 5-star. He said there were 47 more 5-star awards this year than last year.

Col Kloeber stated he is very proud to be associated with the Arizona Chapters of MOAA. He said that Arizona is the only state in which the council and all chapters received 5-star awards, and the only state with a representative for the council and each chapter at the awards dinner. He advised that the chapters should not take for granted that they will always receive a 5-star. He thanked all for the hard work they do to make their chapter a 5-star chapter.

Col Kloeber’s presentation follows:

MOAA-Wide

- **5-Star**
 - Councils = 19 (58%) same AZ
 - Chapters = 143 (38%) +47 AZ = 9 (100)
- **Total**
 - 162 (39%) -12

*Assumes 33 Councils and 381 Chapters

Arizona

- Council of Chapters 5-Star
- Arizona Chapter 5-Star
- Coronado Chapter 5-Star
- Grand Canyon Chapter 5-Star
- Green Valley Chapter 5-Star
- Luke Chapter 5-Star
- Northern Arizona Chapter 5-Star
- Superstition Mountain Chapter 5-Star
- Tucson Chapter 5-Star
- Yuma Chapter 5-Star

Arizona

- Ten Affiliates = Ten 5-Star LOE Awards
- 5-Star Clean Sweep = 10th Consecutive Year
- Many of our chapters have earned a 5-Star LOE for even more years

- Arizona represents 2% of all chapters and **6% of 5-Stars**
- Certificates and Streamer Pins were awarded

Picture of Arizona Council and Arizona Chapters at awards dinner included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

Reports of Officers

Secretary – Mrs. Pam Wojtas

- Minutes of Meeting – 7 May 2021 (**Vote #1**) – Mrs. Wojtas stated that she received no corrections or additions to the minutes and asked for a motion to approve the minutes as written. Motion was made by Lt Col John Bushko to approve the minutes and seconded by Lt Col Nicholas Knight. Motion passed unanimously.
- Confirm Meeting Attendance – Due to a virtual meeting, Mrs. Wojtas took a virtual attendance which will be filed with the minutes. Mrs. Wojtas confirmed a quorum was present.
- Chapter Officers Roster Update – Prior to the Council meeting, Mrs. Wojtas distributed to each Chapter President their section of the AZCOC Master Roster. She asked them to check their listing and notify her of any additions or corrections. She also asked the Council Officers & Staff and Past Council Presidents to review their information on the roster. Once all additions / changes have been made, Mrs. Wojtas said she would distribute the updated Master Roster to everyone.

Col Pete Kloeber asked that when you send roster updates to Mrs. Wojtas to also send them to him.

Treasurer – Col Charlie Bitner

- Col Bitner presented slides showing the 2021 Budget Recap, the Year-to-Date Banking Summary and the Statement from Chase showing that the Banking Summary and the Chase Statement agree. Slides included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

2022 Budget – (**Vote #2**)

- Col Bitner presented the 2022 budget. He stated that due to the continuing COVID virus, very little happened. He also stated that in his budget he did not include money from MOAA which we may or may not receive. He said he did increase Administrative Expenses and Travel. He stated that if the virus slows down, there may be more travel and admin expenses. He also mentioned that there is a line item showing \$500 committed funds for Satellite Chapters. Col Bitner stated he will know the exact amount for dues in January when he receives from Mrs. Wojtas the number of members and surviving spouses in each chapter, but the amount listed is a fairly accurate estimate.

- Col Pete Kloeber said that the Knights of Columbus will no longer be sharing the cost for the Council’s Zoom account. He told all Chapters if they would like to use the Council Zoom account to let him know and he will set it up for them to use.
- Budget Slide included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.
- A vote was taken to approve the submitted budget. The vote was unanimous to accept the proposed budget.

President – Col Pete Kloeber

AZ Chapters – Membership

- Chart included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

After Col Kloeber presented his slides, he commented that Arizona is doing well. He did say there was a slight drop in members from November 2020 to November 2021. He commented that all Chapters are doing better making sure their members are members of National MOAA. Col Kloeber stated that National MOAA increased their membership by 3,000 last month. Col Gary Pettett commented that there are only 40,000 Chapter members out of 354,000 National MOAA members. Col Kloeber said that is correct. Lt Col Nicholas Knight made the comment that 40,000 Chapter members believe in MOAA. Col Pettett asked the average age of members.

Action Item #1 – Col Kloeber will get the answer for the average age of members.

AZ Chapters – MOAA Membership

- Chart included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

AZ Chapters – Metrics

- Charts included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

MOAA Grants – 2021

- | | |
|--------------------------------|--------------------------|
| • Community Outreach (4 of 33) | • COVID Relief (3 of 17) |
| • Arizona \$ 2,500 | • Grand Canyon \$1,250 |
| • Grand Canyon \$ 2,500 | • Luke \$2,500 |
| • Luke \$ 5,000 | • Tucson \$1,250 |
| • Tucson \$ 2,500 | |

Total	\$12,500	Total	\$5,000
	Grand Total	\$17,500	

Info / Reminders

- Find C&C on website – moaa.org
 - “About MOAA”
 - “Councils and Chapters”
- Pay Chapter Dues Online – <https://chapterdues.moaa.org/ChapterTools/default.aspx>
 - “Council and Chapter Recruiting and Membership”
 - Online Chapter Membership Dues (Join and Renewal)”
- DoD and Military Seals (*Military Service Marks*)
 - May not be used without permission
 - Implies endorsement of organization / entity
- Send newsletters to MOAA (blaird@moaa.org)
- Opt-in TMN – just enter email
 - https://moaa.highroadsolution.com/moaa_preference_page/EmailSearch.aspx
- MOAA Visits – Request online
 - <https://www.moaa.org/content/chapters-and-councils/council-and-chapter-management/initial-chapter-visit-request/>

After Col Pete Kloeber presented his slides there was discussion on using National MOAA for paying dues online. Two Chapters stated they used the online dues paying feature but were not getting notification from National that dues had been paid and by whom. The president may get notified, but not the treasurer.

Action Item #2 – Col Kloeber will work with National MOAA to make sure they have an identified person to send the notification to when dues are paid online.

Action Item #3 – Col Kloeber will work with National MOAA to notify the president and treasurer when money from National is put into the chapter’s bank account and what the money is for.

Action Item #4 – A Chapter asked when MOAA sends funds via Electronic Funds Transfers to chapters. Col Kloeber said he believed it is the 5th of the month, but would confirm.

Opted-In for Communications

- Chart included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

Info / Reminders

- Quarterly Incentives - \$50
 - Q1: Use of Online Dues System May 2020 thru April 2021. Self-report not required

- Q2: Chapter website or MOAA web presence. Self-report URL to chapters@moaa.org by 30 June
- Q3: Use NRT during quarter. Self-report by 5 November (TODAY)
- Q4: Chapter community event during year (virtual OK) AND report on LOE in 2022
- MOAA Chapter Recruiting Program Guide and Recruitment Tracker (downloads)
 - <https://www.moaa.org/content/chapters-and-councils/chapters-and-councils/council-and-chapter-recruiting-and-membership/>
- Near Real Time (NRT) Recruitment List – new 1st of each month
 - CM: “Details for xxxxx Chapter”, “Monthly Recruiting List”
 - Reason on list: (1) New to MOAA; (2) moved to catchment area; (3) opted in for emails
- Recruitment Incentives
 - \$15 for every incentive-qualified PREMIUM member (new or upgrade)
 - \$30 for every incentive-qualified LIFE member (new or upgrade)
 - Incentive-qualified: NOT National MOAA member preceding three years (except upgrades)
- MOAA National Dues Increasing effective 1 January 2022

After Col Kloeber presented his slides, there was discussion on the monetary incentives for PREMIUM and LIFE members.

Action Item #5 – Col Kloeber will ask National MOAA for clarification if the monetary incentives are for new PREMIUM and LIFE members or for new chapter members who are PREMIUM or LIFE members of MOAA.

MOAA Quarterly Incentives

- Chart included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

MOAA National Dues

2022 & 2023

	Regular			Regular	
	<u>Now</u>	<u>New</u>		<u>Now</u>	<u>New</u>
1-Year	\$ 48	\$ 59		\$ 43	\$ 53
2-Year	\$ 82	\$100		\$ 73	\$ 90
3-Year	\$108	\$132		\$ 97	\$120

Note: National Premium % dropping due to conversion to Life

Committee Module Reminders

- ALL “Eligible” members MUST be shown as a “Member” (ONLY once)
- DO NOT show “Ineligible” members as a “Member”
 - Only show for leader position
- Non-MOAA Members
 - “View All” then Click on “Membership” – puts all “Blanks” at top
- 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
- If submit Common Join Form for new member / or member joins online
 - Still need to add to CM
- <https://www.moaa.org/content/chapters-and-councils/committee-module/>
- Transition to new Automated Management System (AMS) – January 2022

MOAA Councils

- **Lead and coordinate efforts in state legislative advocacy**
- Support National MOAA legislative objectives
- Identify / negotiate chapter geographical boundaries
- Help form new chapters and satellites
- **Help established chapters become stronger / more effective**
- Help revitalize ailing chapters
- **Disseminate items of interest / importance to member chapters**
- **Provide forum for exchange of ideas among member chapters**
- Conduct / sponsor state conventions
- **Consolidated communication link with National MOAA**
- Represent a consensus of member chapters
- Lead...but **not direct member chapters**

Council Communications

- Semi-annual Meetings
- Website – <https://www.azcouncilofchapters.org>
- Facebook – <https://www.facebook.com/AZCOCMOAA/>
 - Chapter self-posting
- Newsletter – Semi-annual...following Council Meetings
- Emails – Maybe more than you want...
- Round Tables – 3rd Fridays @ 1000 hrs. (Renewed Council Zoom)
- Chapter Newsletters – sharing

Chapter Governance

- Ensure the Future

- Ensure the Mission
- Ensure Effective Operations
- Ensure Effective Governance
 - State and IRS Founding Documents
 - Bylaws
 - Vision and Mission Statements
 - Strategic Plan
 - Operations Plan / Manual

MOAA / Board Perspective

Status of MOAA Chapters

- | | | |
|-----------|-----|-------|
| • Healthy | 235 | (62%) |
| • Stable | 69 | (18%) |
| • Ailing | 53 | (14%) |
| • Dormant | 24 | (6%) |
|
 | | |
| • Total | 381 | |

Councils and Chapters Strategic Goals

- Increase overall **chapter membership**, emphasizing younger members to mitigate attrition and leadership succession challenges inherent in an aging volunteer membership.
- Strengthen and grow our **virtual chapters**.
- Expand **headquarters support** to all affiliates in the areas of non-dues revenue generation, advocacy engagement tools, recruiting and retention, leadership succession, communications, administrative and technology assistance, and leadership development.
- **Share information** across the affiliate network on best-in-class practices, emphasizing advocacy, membership growth, and community service, thereby increasing MOAA brand awareness among prospective members and their families.
- Strengthen affiliate **legislative advocacy** to maintain legislative influence in **every state**.
 - Legislative Consortium = 38 states and 100 members.

Councils and Chapters Strategic Metrics

- Five-year trend – Number of chapters / members of geographic, satellite, and virtual chapters (~40K)
- Three-year trend – Chapter members who are National members (~89%)
- Three-year trend – MOAA National members who belong to a chapter (~12%)
- Percentage of Board members who are chapter members (~72%)

Advocacy in Action Update

- 2021 wrap-up:
 - Contacted all 535 congressional offices
 - Over 20,000 messages sent; 350 meetings held
 - Continuing the efforts to:
 - Stay engaged on omnibus bills for Toxic Exposure
 - Build support for TYA during second session
 - Ensure BNA details align with our interests

- 2022 ahead:
 - Assess current priorities and shift to second session
 - Committee to scope MOAA’s next spring fling early in 2022 to align “topics” with President’s budget
 - In person vs. virtual TBD

Key Dates

- Nov 1 Scholarship application period begins
- Nov 18 Monthly Roundtable: Community Outreach Grants and Sponsorships
- Nov 19-20 Southwest Leaders’ Workshop (San Diego, CA)
- Dec 1 Community Outreach Grant Applications open
- Dec 1 Community Sponsorship (USAA) Applications open
- Dec 30 Monthly Roundtable: Incorporation, Tax Status, Liability Insurance
- Jan 1 Mercer Ad Campaign begins (only 22% of chapters in 2021)
- Jan 27 Monthly Roundtable: TBD
- Feb 1 Communications Award Submittals deadline
- Feb 24 Monthly Roundtable: TBD
- Feb 24 Community Outreach Grant Application deadline
- Apr 25-28 Advocacy in Action / Council Presidents Seminar
- May 31 Mercer Ad Campaign ends

MOAA Council & Chapter Affairs Team

800-234-MOAA (6622)

- CAPT Erin Stone, USN (Ret)
 - Senior Director, ext. 108; erins@moaa.org
- CAPT Frank Michael, USN (Ret)
 - Program Director, ext. 818; frankm@moaa.org
- Victoria Twyne
 - Program Manager, ext. 118; victoriat@moaa.org
- Candice Young
 - Chapter Affairs Specialist, ext. 120; candicey@moaa.org
 - (Chapter visits and awards)
- Jonathan Woodruff
 - Chapter Affairs Specialist, ext. 168; jonw@moaa.org
 - (Organizational Analysis, CM)

Reports of Staff / Committees

Legislative Affairs – Lt Col Darren Venters

This is a summation of some of Lt Col Venters’ slides. His presentation slides follow this summation.

Lt Col Venters said two of the most important slides in his presentation are the slides showing the U.S. Congressional Districts and the Assigned Chapters and U.S. Senators and the Assigned Chapters.

He said he cannot emphasize enough the importance of knowing your Representatives. He will be updating the Representatives with any changes and will make sure to include the contact information; phone numbers and email addresses.

Lt Col Venters stated that 20,00 letters were sent to Legislators, 350 meetings held and all 535 congressional offices were contacted.

He stated that the COLA will be 5.9%, the largest in four decades.

Lt Col Venters stated that one of the biggest successes was the Veterans Income Tax Exemption.

He mentioned that the State Legislative Session convenes 10 January 2022 and bills are being drafted now.

Col Kloeber thanked both Lt Col Venters and Col Lee Lange for all their hard work on State Legislation.

Federal Legislation

- White House Addresses Key Quality of Life issues for Military Families
 - Economic opportunity and mobility for families
 - Educational needs of military children
 - Developing quality behavioral, social, and emotional health resources for military families, veterans, caregivers, and survivors
 - Improving health care and services for families with special medical and / or educational needs
 - Military Spouse Employment Partnership
- FY 2022 Defense Budget Topline \$777.9B
 - House version passed 316 – 113
 - Senate Version
 - Conference?
- 2.7% pay raise for troops
- Improvements for special needs
- National Cemetery eligibility
- Protect earned benefits
- Take Action [Home \(moaa.org\)](https://moaa.org)
 - Ask your Legislators to adjust SGLI and VGLI for inflation with the Supporting Families of the Fallen Act
 - Urge your elected officials to Support Comprehensive Toxic Exposure Reform Legislation
 - Urge your elected officials to Fix the TRICARE Young Adult Coverage Gap
 - Ask your lawmakers to Support the Military Hunger Prevention Act

- Support Health Care for Children of Disabled Veterans or Veterans who have died due to service-connected disability
- Urge your Legislators to Support Concurrent Receipt
- Did you know
 - 116th Congress 2019 – 2020
 - 16,601 bills introduced
 - 344 (2%) became law
 - Five-year trend is about 3%

Grassroots Advocacy in Action

- Councils / Chapters had virtual meetings with Legislators
- Three issues for discussion
 - Toxic Exposure Reform – 200 co-sponsors now
 - Not tied to NDAA
 - Parity for TRICARE Young Adults – Not in NDAA
 - The Health Care Fairness for Military Families Act of 202, HR 475, S1972
- Basic Needs Allowance
 - The Military Hunger Prevention Act would establish a Basic Needs Allowance
 - Two versions in NDAA

U.S. Congressional Districts / Assigned Chapters

- Chart included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

U.S. Senators / Assigned Chapters

- Chart included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

Social Security

- COLA
 - 5.9% - largest in 4 decades
 - Notices mailed in December
 - Full Retirement
 - Born after 1960 – 66 years 10 months
 - Apply SS tax up to \$142,800
 - Top rate
 - Approximately 6% of work force
- Chart showing Changes in Inflation – included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

2021 State Legislative Session

- Successes: Signed by Governor
 - Veterans Income Tax Exemption, Benefits, annuities and pensions, retroactive to January 1, 2021.
 - 12 “FTE” Veterans Benefits Counselors
 - State Veterans Home Mohave County Provides \$25M state share of costs.
 - Military Family Relief Fund. Fine tunes eligibility and enhances administration.
 - Requires notice of reciprocity agreement to be printed on application and posted on website.
- Died in Process
 - Property Tax Exemption
 - SB1260 updates amounts
 - SCR1027 Constitutional Property Tax Exemption
 - SCR2019 Constitutional Property Tax Exemption
 - Would be on the ballot for voter approval
 - HB2217 Chinle Veterans Nursing Home
 - HB2417 Mandate to ask if individual of family member has ever served in the military.

2022 State Legislative Session

- Convenes January 10, 2021
 - Bills are being drafted now
- Veterans Stakeholders Meeting September 24, 2021
 - Co-chairs: Rep. Andrade and Blackman
 - Plan to reintroduce bills that failed 2021
 - Wish List Discussion
 - Instate Tuition for Veteran’s Children
 - Veterans Home in Phoenix
- MOAA
 - Income tax parity for UPHS and NOAA
 - Disabled Veterans’ property tax exemption
 - Amend HOA Statute to allow Space Force flag
 - Relief for Guard or Reserve students who miss class due to “military duty”
- Know **Your** Representatives
 - Have a face-to-face meeting
 - Get their cell phone – use sparingly
 - RTS “request to speak” follow bills

Chapter Assigned to Legislator

- Charts included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

Surviving Spouse Advisory Council – Mrs. Sharon Douglas

Surviving Spouse Virtual Meeting Update

- Currently 173 members from 34 states.
- Meetings are held the third Tuesday of each month and alternate between a business meeting and a social meeting.
- Gayle Joyce, MOAA Board Member and S.S. Rep. will give a presentation at the Regional Leadership Meeting in San Diego.
- Topics will include how to prepare to be a S.S. before it occurs. Actions to take now to prepare for later.
- The Deceased Vietnam Veteran's Surviving Spouse certificate and lapel pin were created by DoD to recognize the surviving spouse of anyone who gave their lives in active duty in the U.S. Armed Forces between November 1, 1955 and May 15, 1975. Contact Judith Thomas for more info and to order.

MOAA Webinar, Survivor Planning and Benefit Issues

- The recent MOAA webinar, Survivor Planning and Benefit Issues is available in PowerPoint on the MOAA website.
- Not only can it be viewed on the website, it is available for download and may be used at chapter gatherings.
- Surviving Spouse Liaisons are encouraged to have at least one meeting a year for their chapters. This presentation would be good for a chapter meeting as it covers issues that cannot be repeated too many times, or too often.

SBP / DIC Offset Update

- SBP / DIC Offset Phase 2 letters are scheduled to be mailed December 10th. These are the letters that will show the estimates beginning February 1, 2022.
- Phase 3 Reversion Packets for those AD Military Child Only Recipients are scheduled to be mailed November 19th.

Info for S.S. of USCG, USCGR, NOAA and PHS

- Different branches of the military have different processes, different issues, and different paperwork. Some useful tools and information for Survivors of USCG, USCGR, NOAA and PHS Retirees can be found at PPCPUB 1800.
<https://www.dcms.uscg.mil/portals/10/cg-1/ppc/ras/survivorguide.pdf>
- If you know of other useful publications for the various military branches, let me know.

MOAA Membership for Surviving Spouses

- Many surviving spouses are not aware how to become a member of MOAA.
 - If the deceased spouse was a life-time member of MOAA, that life-time membership rolls over to the surviving spouse.

- If the deceased spouse was a prime member and died during the three-year term of their membership, the remaining time rolls over to the surviving spouse.
- A surviving spouse can join on their own even if the deceased spouse was not a MOAA member.
- If it's not known whether or not the deceased spouse was a member, contact Victoria with Chapters and Councils at MOAA.

COLA Increase for 2022

- The Social Security cost-of-living adjustment for 2022 will be 5.9%. This is the COLA for SBP, DIC and SSIA too.
- The annual increase will be the highest beneficiaries have seen in about 40 years.
- Doing my math, unofficially, the new DIC flat rate amount will be \$1,437.66 and the new offset to SBP will be \$479.22 in 2022. SSIA is \$327 and will go up to \$346. Everyone's Social Security and SBP is different so I cannot calculate that. Take your gross from 2021 and multiply it by 5.9% or .059 to get your new amount.

Beneficiaries With Expired ID Cards: Renew Now

- The DoD extended the deadlines several times, most recently in June. Under the latest guidance, dependents of active-duty, Guard and Reserve members whose ID cards expired before July 31, 2021, have until October 31, 2021 to get a new ID card.
- Retirees and family members whose cards expired before the end of July face a deadline of January 31, 2022.
- Beneficiaries whose cards expired after July 31, 2021, and who haven't yet renewed, should do so immediately or face the loss of benefits (with the exception of health care).
- ID Card office locations can be found and appointments made on the DoD's ID Card Office website: <https://idco.dmdc.osd.mil/idco/>.

TRICARE Approved Pharmacy Changes for 2022

- CVS will rejoin the TRICARE Pharmacy Network as of December 15, while Walmart / Sam's Club will leave the network at the same time. With the change, military families will have access to the two largest chain drugstores in the U.S. – Walgreens and CVS – together with many smaller chains and independent pharmacies.
- Beneficiaries who get prescriptions filled at Walmart or Sam's Club will receive a letter notifying them of the change. The letter will include three local TRICARE Network Pharmacies they might consider using instead, together with suggestions on how to transfer prescriptions most easily to another retail pharmacy, home delivery, or a military treatment facility (MTF) pharmacy.
- Families who fill prescriptions at Walmart or Sam's Club will need to move them to another TRICARE Network Pharmacy before December 15.

2022 TRICARE Pharmacy Copay Information

- As of January 1, TRICARE copays for prescription drugs will increase as follows:

- TRICARE Pharmacy Home Delivery (up to a 90-day supply)
 - Generic Formulary drugs: from \$10 to \$12
 - Brand-name formulary drugs: from \$29 to \$34
 - Non-formulary drugs: from \$60 to \$68
- TRICARE Retail Network Pharmacies (up to a 30-day supply)
 - Generic formulary drugs: from \$13 to \$14
 - Brand-name formulary drugs: from \$33 to \$38
 - Non-formulary drugs: from \$60 to \$68
- Prescriptions obtained at military treatment facility (MTF) pharmacies still have zero out-of-pocket cost.

Medicare Open Enrollment

- Open enrollment period is October 15 through December 7, 2021.
- You are able to make changes to your Medicare and supplemental plans at this time.
- Review your 2022 “Medicare & You” handbook. It has information about Medicare coverage and Medicare plans in your area. If you want to get your handbook electronically, you can go paperless by logging into (or creating) your secure Medicare account.

BENEFEDS Open Enrollment

- **Enrollment**
 - You can enroll in the Federal Employees Dental and Vision Insurance Program (FEDVIP) every year during open season. You can also enroll outside of open season if you are newly eligible or experience a qualifying life event (QLE). Once you enroll in a FEDVIP dental and / or vision plan, your coverage will automatically continue each year.
- **Open Season**
 - The Federal Benefits Open Season (or open season) is your annual opportunity to enroll in, change, or cancel a FEDVIP dental and / or vision plan. Each year, open season runs from the Monday of the second full work week in November through the Monday of the second full work week in December.

Military Retiree Survivor Comfort Act (H.R. 2214)

- The Military Retiree Survivor Comfort Act (H.R. 2214) would allow survivors to keep the full amount of the retirement check issued for the final month in which the member was alive without the shock of losing a large chunk of funds from DFAS recoupment. The survivor will instead, gradually repay the amount over the next 12 months and have an opportunity to request debt forgiveness through the Department of Defense.
- Sponsor: Rep. Garamendi, John (D-CA-3) (Introduced 03/26/2021)
- Committees: House Armed Services
- Latest Action: House – 03/26/2021 – Referred to the House Committee on Armed Services
- Contact your representatives and let them know you support this bill.

Caring for Survivors Act

- Introduced in House (05/20/2021).
- Caring for Survivors Act of 2021.
- This bill increases the monthly rate of dependency and indemnity compensation payable to surviving spouses through the Department of Veterans Affairs.
- The bill also adjusts the amount payable to surviving spouses and children of veterans who were rated as totally disabled for a period of less than 10 years before their death.
- Latest Action: House – 08/02/2021 – Referred to the Subcommittee on Disability Assistance and Memorial Affairs.
- Contact your representatives and let them know you support this bill.

Property Tax Relief

- First, there is an exemption for widows, widowers and totally disabled persons. For qualified people, the exemption has the effect of reducing the assessed value of the real property by up to \$3,000 with a corresponding reduction in property tax.
- Seniors in Arizona are entitled to several types of relief.
- Second, there is a program of tax deferral. Under the deferral program, payment of property taxes is not required until the real property is sold or the person dies or the property becomes income producing.
- Third, under Proposition 104, which passed in 2000, qualified individuals are granted a property tax freeze.

Change to 10 Digit Dialing for 928, 520, 480

- A reminder that starting October 24th, when dialing a local number, you will have to dial the full 10-digit number – this is applicable for Arizona area codes: 928, 520, and 480. This is so the new Suicide Hotline Number 988 will work for everyone.

New AZ Veterans' Benefits Guide – October 2021

- AZ Veterans' Benefit Guide (October 2021) Issued Brand-new Comprehensive Guide.
- <https://dvs.az.gov/sites/default/files/documents/files/Arizona-State-Veteran-Benefits-Guide-2021-10a.pdf>
- OR
- <https://bit.ly/3AtuCic>

Reduce Suicide Deaths by Firearms in Arizona

- The free gun lock is made available through 'Secure Your Weapon' – a non-partisan public health education campaign with the sole mission of reducing suicide deaths by firearms among Arizona's 500,000+ service members, Veterans, and their families
- Secure Your Weapon's free gun lock program is a partnership of the Arizona Health Care Cost Containment System, the NARBHA Institute, the Arizona Department of Veterans'

Services, the U.S. Department of Veteran Affairs, TriWest Healthcare Alliance, the Arizona Coalition for Military Families, and Be Connected.

- Fill out a form to receive your free gun lock. Locks are available while supplies last to Arizona residents who are service members (Active Duty, Guard, Reserve) and Veterans. Go to: ConnectVeterans.org/lock.

End of Presentation

- Thank you for your time and attention this morning.
- As always, if you have any questions or have anything you would like to add to the next Surviving Spouse Update issue, please let me know.
- Sharon Douglas
- Surviving Spouse Liaison
- Arizona Council of Chapters
- Sharon.Douglas.NACMOAA@gmail.com
- 928-899-6655

Chapter Development – Lt Col Dick Jonas – (Report Given by Col Pete Kloeber)

How To Do It

- Goal is to form new chapters
 - New satellite chapter must be initiated by a host chapter in the catchment area
- Prospective satellite needs strong nucleus of energetic and dedicated people
 - Grand Canyon Chapter classic example
 - Catalina Mountains Chapter
- Support and nurturing for new satellites
- Recovering from the pandemic
 - In-person meetings
 - Recouping meeting attendance
 - Recruiting new members
 - NRT
 - Word of mouth by members
- MOAA Affiliate Operational Matrix
 - <https://www.moaa.org/content/search-results/?keyword=matrix>

MOAA Affiliate Operational Matrix

- Charts included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

Status of Satellite Chapters

- Mohave Satellite (Northern Arizona Chapter)
 - 14 Members
 - Leader succession issues (health); meetings suspended

- Host chapter decision to close effective 31 December 2021
- Members invited to participate with host chapter
- Notified MOAA
- Central Arizona Satellite (Superstition Mountain Chapter)
 - 11 Members
 - Problem with leader succession, meeting attendance, and activity
 - Host chapter addressing viability and future of the satellite
 - Satellite to close 1 January 2022 unless significant increase in membership
- Catalina Mountains Satellite (Tucson Chapter)
 - 51 Members
 - Strong leadership, good meeting attendance, energetic / active
 - Ready to advance...if and when leadership and members so desire

Personal Affairs – CDR John Chernoski

Serving in the Armed Forces to Become a U.S. Citizen

- I recently read an article in the *American Legion Magazine* (June 2021) regarding difficulties some foreign-born service members and veterans were having in accessing the benefit of becoming American citizens. However, the article did not discuss the “how to” for service members and the naturalization process.
- According to the Legion article, approximately a half million foreigners served in the U.S. armed forces during WWI and 300,000 during WWII. The service of foreigners in the military is not something new. The Rome Legions relied heavily upon “barbarians”. France has its renowned French Foreign Legion. During our revolution, foreigners such as Lafayette, Kosciuszko, Von Steuben, and Pulaski became household names in the fight for our liberty. Indeed, there is a program which speeds the citizenship process for the foreign service member and his/her family. The U.S. Citizen & Immigration Services has a website providing detailed information to the service member: <https://www.uscis.gov/military/naturalization-through-military-service>.
- There are a variety of reasons for the difficulties of foreign service members and veterans in accessing American citizenship (e.g., neglect, commission of a serious crime, making a conscious choice, etc.). However, lack of assistance should never be a reason. (*In my Navy JAG career, I had one matter involving a foreign service member and citizenship. It was before the computer era and I ended up calling the Canadian consulate in Philadelphia.*)
- The U.S. citizenship program does involve the successful completion of a test. See how you do. Good luck. <https://my.uscls.gov/prep/test/civics>

ESGR – Lt Col Darren Venters

Secretary of Defense Employer Support Freedom Award

- ESGR’s awards program culminates with the Secretary of Defense Employer Support Freedom Award, the highest recognition given by the U.S. Government to employers for their outstanding support of employees serving in the Guard and Reserve.

- Each year, Guard and Reserve employees have the opportunity to nominate their employer for the Employer Support Freedom Award.
- A national selection board comprised of senior Department of Defense officials, business leaders, and prior awardees select up to 15 employers to receive the Secretary's prestigious award.
 - 2021 Recipients in Arizona
 - Nogales Police Department – Nogales, AZ
 - Loftin Equipment – Phoenix, AZ
- **Nomination season runs from October 1 through December 31.**

Transition Liaison – CW3 Harry Bowen

Arizona Transition Liaison

- Topics
 - Semi-monthly Transition and Networking Webinar
 - Employment Opportunities within Arizona
 - Job Announcements
 - Reported Job Fairs
 - Links

Employment Opportunities

- Employment Announcements have fallen off over the past six (6) months. As an example, during this last 6 months, we have posted:
 - **Single Listings – 0**
 - CONUS – 0
 - California – 0
 - AZ Wide – 0
 - **Multiple Listings – 5**
 - Texas – weekly, we get an update link that provides opportunities within Texas
 - Phoenix – 0
 - California – 0
 - Statewide – 0 (covers multiple locations)
 - OCONUS – 0

Job Fairs and New Employment Links

- **Job Fairs**
 - Benson – 1
 - Texas – 1
- **New Employment Links**
 - Educational – 1
- **Transition**
 - The MOAA Job Board has been readded

Suggested Changes to COC Transition Liaison

- Recommended Additions
 - Maintain link to Brazen – National Virtual Job Fair.
 - Share, on a semi-monthly basis, results of Transition and Networking Webinars online at MOAATOPSAZ.ORG.
 - Update Employment Links to only include links for members to access as desired.
 - Share all correspondence resulting from membership of the Transition and Networking Webinars to a new link on the MOAATOPSAZ.ORG exclusive of career information.
- Questions and Comments
 - Please send to HarryBowen@aol.com

Old Business – Col Pete Kloeber

- Consider waiving Council dues
 - Deferred to “normal” times
- MOAA New Association Management System
 - New estimate = January 2022
- Council Insurance (slide follows)
- Chapter Officer / Leader Training (slides follow)

Council Insurance

- General Liability
 - Mercer \$323.20 (November 2020)
 - Tatum \$325.00 (November 2020) – CNA
\$496.00 (November 2020) – Hartford
 - Lockton Affinity (chapter compare) +42% 2017 and +103% 2021
- Liability Per Event
 - Tatum \$175.00 per event (November 2020) – Philadelphia
- Directors and Officers (D&O)
 - Mercer \$553 w/\$1K deduct; \$495 w/\$2.5K deduct (October 2021)
 - Tatum \$319 (chapter – November 2020)
 - Lockton Affinity \$575 (\$1M) & \$1,575 (\$5M)

There was discussion as to whether the Council should get insurance. After all the discussion, the decision was to not get insurance for the Council.

Chapter Officer / Leader Training

Develop training plan / program – take advantage of virtual capability

- Timely phone call to new chapter officer / leader
 - Initial assistance based on questions / need
 - Referral to SMEs
- Quarterly sessions (virtual and / or in-person) by AZCOC on select topics

- CM / NRT
- Legislative
- Leader Succession
- As needed / determined sessions (virtual and / or in-person by SMEs for specific position / topics)
- Source Documents / Familiarization
 - MOAA Policies and Procedures Guide
 - MOAA Leaders Workbook
 - AZCOC Chapter Position Responsibilities Guide
 - Governance
 - Corporation Commission / Articles of Incorporation
 - Bylaws
 - OIs / SOPs
 - Operation Plans
 - Strategic Plans
- Council or Chapter SMEs:
 - President
 - Continuity, governance documents, programs, LOE, CM, P&P Guide, Position Responsibilities
 - Treasurer
 - Budgets, reports, IRS (990, 990-N), ACC Annual Reports
 - Membership
 - CM, NRT
 - Secretary
 - Minutes, records
 - Directors
 - Continuity, governance, P&P Guide
 - Legislative
 - Surviving Spouse
 - Chaplain
 - Programs
 - Scholarships, Speakers, Grants (MOAA, ADVS), etc.

There was much discussion on chapter training. It was decided that phone calls would be made to new chapter leaders on a timely manner to see if they had any questions or need assistance in any area. Also, may have virtual or in-person training where Council members will assist new chapter officers, i.e., Council Treasurer may assist new chapter treasurers; Council Legislative Chair may assist new chapter legislative director, etc.

There was also discussion on having more than one person who understands the positions within a chapter, i.e., treasurer, membership, CM. Col Kloeber stated we have what it takes, now just need to implement.

There was discussion on soliciting lessons learned from outgoing chapter officers / leaders.

Action Item #6 – Lt Col Nicholas Knight will present to Chapter Leaders a one-page questionnaire on lessons learned. The questionnaire will be available by the middle of December.

New Chapter Leaders

- President – 4
 - COR, GCC, GV, CMSC
 - 3 attending workshop
- Treasurer
 - GV, CMSC
- Membership – 4
 - COR, GV, LUK, SUP
 - 1 attending workshop

New Business – Col Pete Kloeber

- CW3 Harry Bowen has decided to resign from the position (health)
- CDR John Chernoski has accepted an appointment to the position
- Changeover to be 31 January 2022

Round Table / Items from the Floor

Future Council Meetings

- Spring 2022 (May 6th)
 - Hopefully will be in-person
 - Planned venue is The Colonnade (Surprise, AZ)
 - Coordinators
 - Council VP
 - Council IPP

MOAA SW Regional Leaders Workshop

- Chart included with minutes and included with presentations emailed to council officers and staff, chapter presidents and satellite presidents, past council presidents and other attendees.

Wrap Up / Good of the Order

- Col Pete Kloeber asked for discussion on waving Council Dues for 2022 due to the pandemic. After hearing from the Council and Chapter Presidents, the decision was made to go ahead and charge the Chapters dues with the amount staying the same as last year; \$1 per member and \$0.50 per surviving spouse.
- Going along with the discussion of waving dues, Lt Col Nicholas Knight suggested establishing a threshold for the Council finances. Col Charlie Bitner stated that if 2022 is

a model year, the Council would not run out of funds for seven years. Col Pete Kloeber suggested the threshold be \$7,000 and if the funds get to \$7,000 look at the Council finances. At that point, Col Kloeber said to look at the amount the Council charges Chapters for dues and talk about if they should be increased.

- LTC Dennis DeFrain said that the Luke Chapter has been contacted by Be Connected and that the Chapter has assisted several Veterans who were in need of financial assistance.
- Col Pete Kloeber stated that the monthly Round Table has been a good format and is taking the place of the Round Table during the semi-annual Council meetings.
- COL Tom Day asked if the MOAA Store was open yet. Col Kloeber stated it is not and he doesn't know when it might open.
- Mrs. Sharon Douglas asked about the ordering of challenge coins. Col Kloeber said that the last time he asked no one else needed them. He said if you do need some, to let him know and he will place the order. He stated that the prize is based on how many are ordered and the more ordered, the lower price per coin.
- Lt Col Nicholas Knight said he will be sending out the request for input for the Council newsletter; probably within the next few days. He requested a lot of links to other items / articles.
- Lt Col John Bushko mentioned that Capt. Ed Mangan was having memory problems. Col Kloeber confirmed this was the reason for his resignation as the ESGR representative for the council.

Adjourn (Vote #3)

- A motion to adjourn was made by LTC Dennis DeFrain and seconded by Lt Col John Bushko. Motion passed. Meeting adjourned at 1220.

Respectfully submitted.

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

NEXT AZCOC MEETING – 6 May 2022 (hopefully at The Colonnade in Surprise, AZ)