



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

0800 Hours, Friday, 2 May 2025

**IN-PERSON MEETING HELD AT THE COLONNADE
LOCATED IN SURPRISE, ARIZONA**

IN ATTENDANCE:

Arizona Council of Chapters:

President: CAPT Charles Vaughan

Vice President and President Arizona Chapter:

CAPT Bruce Kosaveach

Past President and National MOAA BOD:

Col Peter Kloeber

Secretary and Membership: Mrs. Pam Wojtas

Treasurer: Col Charles Bitner

**Legislative Affairs and President Grand Canyon
Chapter:** Col Tom Waddell

Surviving Spouse Liaison and 2nd Vice President

Luke Chapter: Mrs. Linda Wolverton

Personal Affairs: Mrs. Polly Parks

Past President & Chapter Affairs:

Col Ron Perkins

Arizona Chapter:

Guest: Mrs. Jan Christian-Perkins

Catalina Mountains Chapter:

President: COL Kurt McMillen

Coronado Chapter:

President: LTC Ed Wozniak

Guest: Mrs. Kaylee Nix

Director, Membership: CW2 Allen Goodman

Guest: Mrs. Donna Goodman

Grand Canyon Chapter:

Assistant Membership Chair and Surviving

Spouse Liaison: Lt Col Joyce Kloeber

Guest: Mrs. Sharise Waddell

Green Valley Chapter:

President: CW3 Jack Bundy

Surviving Spouse Liaison: Mrs. Nora Durham

Luke Chapter:

President: Major Gene Wikle

Director At Large: COL Jerry Wojtas

Tucson Chapter:

President: Lt Col Ann Hollis

Administration

Call to Order: CAPT Charles Vaughan called the meeting to order at 0800.

Invocation: The invocation was given by CW2 Allen Goodman.

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

Attendance/AZCOC Master Roster Update – Mrs. Pam Wojtas

- Quorum
 - Mrs. Wojtas confirmed that there was a quorum.
- Attendance Roster and Council Roster Update
 - Mrs. Wojtas stated she is passing around an attendance roster for all attendees to sign. Prior to the Council meeting, Mrs. Wojtas emailed a copy of the AZCOC Master Roster to the Council Officers and Staff, Chapter Presidents and Past Council Presidents and asked them to look over the roster for any changes or corrections. At the meeting, Mrs. Wojtas passed around the roster and asked those in attendance to check the roster for any additions or corrections. Once all additions/changes have been made, Mrs. Wojtas stated that she would distribute the updated master roster to everyone.
- Minutes of Meeting 8 November 2024
 - Mrs. Wojtas stated that she had not received any additions or corrections to the minutes. She asked the attendees if they had any additions or corrections. Hearing none, Mrs. Wojtas asked for a motion to approve the minutes. A motion was made by Col Tom Waddell and seconded by CAPT Bruce Kosaveach. Motion passed. **(Vote #1)**

Opening Comments/Introduction of Guests – CAPT Chuck Vaughan

- Thank you for coming and giving up a day or more of your time to attend our semiannual meeting.
- I especially thank Pam Wojtas, Bruce Kosaveach and Pete Kloeber for helping me organize today's meeting.
- Feel free to ask questions.

Welcome

- New Chapter Presidents
 - Kurt McMillen, Catalina Mountains Chapter
 - Tom Waddell, Grand Canyon Chapter
 - Ann Hollis, Tucson Chapter
- Guests Today
 - Nora Durham, Green Valley Chapter
 - Allen and Donna Goodman, Coronado Chapter
 - Joyce Kloeber, Grand Canyon Chapter

- Kaylee Nix, Coronado Chapter
- Jan Christian -Perkins, Arizona Chapter
- Sharise Waddell, Grand Canyon Chapter
- Jerry Wojtas, Luke Chapter

10 AZCOC Chapters

- We've had 10 chapters since July 2022 when the Catalina Mountains Chapter was chartered by MOAA.
- The Superstition Mountain Chapter, AZ07, will cease to exist as of 31 May 2025.
- The AZCOC will be back to 9 Arizona Chapters as of 1 June 2025.

Thanks For Coming!

- See you Friday, November 7th, somewhere in the Tucson area.

Action Item #1 – Email copies of all presentations

Awards Presentation – Col Pete Kloeber

Col Kloeber had a few comments before his slide presentations (see slide presentations below comments).

- Arizona has a very good reputation outside of the state. He said he hears this every time he goes back to MOAA.
- Arizona has been the recipient of the Legislative Liaison award three out of the last five years; Col Tom Waddell, Col Lee Lange and this year Lt Col Darren Venters.
- No other state had more 5-Star awards than Arizona; not even California with their 29 chapters.
- Being on the committee which reviews the LOEs, make sure you address the question. Several submissions didn't answer the question which was asked.
- Some chapters received four MOAA Community Outreach Grants; Tucson received two.

Slide Presentation

MOAA AWARDS for 2024 – Arizona Shines Bright 'AGAIN'

MOAA Individual Awards

- Legislative Liaison of the Year Chapter 2024
 - Lt Col Darren Venters, USAF (Ret) – *Green Valley Chapter*

MOAA Levels of Excellence Awards for 2024

MOAA-Wide

- 5-Star
 - Councils = 17 (50%) Includes 1 VC AZ
 - Chapters = 141 (41%) Includes 3 VC AZ
 - 4-Star
 - Councils = 0
 - Chapters = 7 (2%)
 - 3-Star
 - Councils = 0
 - Chapters = 1 (3%) AZ = 1
-
- Total = 169 (48%)
(169 submissions)

Total affiliates: 34 Councils (33 Geo and 1 VC) and 351 Chapters (344 Geo and 7 VC)

Arizona

- 11 Affiliates = 10 each 5-Star LOE Awards
1 each 3-Star LOE Award
- Many of our chapters have a long history of 5-Star Awards ...
 - 19 = Luke
 - 16 = Arizona, Coronado, Green Valley, Tucson
 - 15 = Yuma
- Arizona represents 2.9% of all Geo affiliates and 6% of 5-Stars

Arizona

- Council of Chapters 5-Star
- Arizona Chapter 5-Star
- Catalina Mountains 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
- Tucson Chapter 5-Star
- Superstition Mountain Chapter 3-Star
- Yuma Chapter 5-Star

MOAA Colonel Marvin J. Harris Communications Awards for 2024

- 255 Applications and 225 Awards
- 147 Affiliates Council = 11 (1 Virtual), Chapter = 136 (3 Virtual)
- 92 Websites

- 5-Star = 79 Council = 8, Chapter = 71, (1 Virtual) **AZ = 7**
- 4-Star = 13 Chapter = 13
- 133 Newsletters
 - 5-Star = 111 Council = 4, Chapter = 107 (3 Virtual) **AZ = 11**
 - 4-Star = 22 Council = 2, Chapter = 20
- Arizona represents 2.9% of all affiliates and **9.5% of 5-Stars**

Arizona

- 7 Websites
 - **Council** *Col (R) Ron Perkins (Jill Shepherd)*
 - **Arizona** *Carl Ulbrich*
 - **Catalina Mountains** *CAPT (R) Chuck Vaughan*
 - **Coronado** *Maj (R) Kyle Molloy*
 - **Green Valley** *Marianne Cobarrubias*
 - **Luke** *Lt Col (R) Robert Nelson*
 - **Tucson** *CAPT (R) Chuck Vaughan*
- 11 Newsletters
 - **Council** *Lt Col (R) Nicholas Knight*
 - **Arizona** *CAPT (Fmr) Stephen MacDonald*
 - **Catalina Mountains** *CAPT (R) Chuck Vaughan*
 - **Coronado** *Harry Mallory*
 - **Grand Canyon** *LT Col (R) Chuck Coffman*
 - **Green Valley** *COL (R) Peggy McGee*
 - **Luke** *Lt Col (R) W. Scott Philips*
 - **Northern Arizona** *Roberta Rice*
 - **Superstition Mountain** *Paula Anderer*
 - **Tucson** *Polly Parks*
 - **Yuma** *LT (Fmr) Jim Adler*

MOAA Community Outreach Grants – 2025

- 58 Applications
- 55 Awarded \$128.9K (46 affiliates)
- Arizona received 6 (4 x fair share)

Grand Canyon	\$ 5,000
Luke	\$ 4,000
Catalina Mountains	<u>\$ 3,250</u>
Arizona	\$ 2,750
Tucson	\$ 1,031
Tucson	\$ 1,000
Total	\$17,031

- **Since 2017 – MOAA has issued nearly 300 Grants for over \$779K**

Chapter Metrics – Col Pete Kloeber

AZ Chapters – Percent of MOAA Members

- Chart is included with minutes and included with presentations emailed to council officers and staff, chapter presidents, past council presidents, and all other attendees.
- Major Gene Wikle contacted MOAA and asked them to send out an email letter from Luke Chapter to non-chapter MOAA members residing in Luke Chapter’s catchment area, highlighting the Luke Chapter and all that they do. MOAA’s database said there were 1,589 members in Luke’s catchment area that did not belong to a chapter. When it came down to it, there were only 900+ of which MOAA only had email addresses for 300+. The email letter was sent and Major Wikle received zero responses.

AZ Chapters – Membership

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

AZ Chapters – MOAA Membership

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

AZ Chapters – Metrics

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

National MOAA Board Member Report – Col Pete Kloeber

Info/Reminders

- Find C&C on website – moaa.org
 - “About MOAA”/“Councils and Chapters”
- Pay Chapter Dues Online – New system/vendor: “Cheddar UP”
 - 45 chapters enrolled, 25 applications in process
- Send newsletters to MOAA (blaird@moaa.org)
- MOAA Web Presence for Chapters
 - <https://www.moaa.org/content/chapters-and-councils/council-and-chapter-newsletters/council-and-chapter-communications/chapter-web-template/>
 - Need Chapter Alias and Chapter ID
 - AZ Leader changes updated – all AZ chapters
- 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/>
- 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 – operational
- 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)
- AMBA (former “Mercer”) Ad Campaign – \$100
 - Enroll 1 Jan – 31 May (only 32 as of April 1st)
 - Contact: dave.shidler@getamba.com (515-365-6632)
- MOAA Vacations Ad Campaign – \$100
 - Ad in at least 1 newsletter and banner ad on website (proof required)
 - Contact: jon@MOAAvac.com or mike@MOAAvac.com (800-211-5107)
- Liability Insurance
 - Arizona: 8 of 10 chapters (7 with Tatum Insurance in Phoenix)
- Required for MOAA Community Outreach Grants (COG)
 - MOAA established agreement with Lockton Affinity - \$550 flat rate

New Committee Module (CM)

- Launched in 3 Phases – approximately 124 affiliates each phase
 - February 24th – included Arizona
 - March 24th
 - April 24th
- Instructional Guide
 - [moaa.org/councils and chapters/chapter leaders/ new committee module information and support/instructions](https://www.moaa.org/councils-and-chapters/chapter-leaders/new-committee-module-information-and-support/instructions): download a full guide
 - https://www.moaa.org/contentassets/67ca3ac4aa3c4ec49c59278940a6c090/cm-instructional-guide_v3.pdf

Committee Module Reminders

- New members can only be shown one time on CM (Member or Leader position)
 - Now have option for **Multiple leader positions**
- Only show “Ineligible” members in Leader position
 - Contact MOAA to ensure in database
- Non-MOAA Members
 - Click on “Reports”/Active Members
 - Click on “MOAA Membership Status” – all non-MOAA members show at top as “blank”
- Duplicate Records

- Click on “Show Community Group Member” and “Customer ID” – Be careful before deactivating
- If submit Common Join Form or Chapter app to MSC for new member/or member joins online
 - Still need to add to CM
- **CM Manager and Member Roles**
 - By Position (default or as requested)
 - If deactivated ... contact [chapters @moaa.org](mailto:chapters@moaa.org)
- Notify MSC of deceased members, moves, contact info changes
- Review CM – Update for changes in leader positions

Value of Chapter System

- One of MOAA’s “Six Major Strategic Areas”
- **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 = \$80K+)
- Camaraderie and networking for members

Chapter Members Epitomize Our Greatest Strengths

- *“These members work tirelessly in their communities in so many ways: supporting state and national advocacy efforts, contributing to MOAA Charities and other worthy causes, inspiring the next generation of service members through ROTC and JROTC, and, of course, living our motto to ‘Never Stop Serving’”.*
Lt Gen Brian Kelly, MOAA President/CEO

Chapters

- “Affiliated” with MOAA
- Separate Organization Structure
- Charter = Use of MOAA Name & Brand
- Legal issues/questions – 95% in Policy & Procedure Guide
 - <https://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 = 8 of 10
 - Required for MOAA Community Outreach Grants
 - 2025 Grants: MOAA working to reduce cost to chapters

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 and satellites
- **Help established chapters become stronger/more effective**
 - Jim Clenney: Catalina Mountains, Coronado, Green Valley, Tucson, Yuma
 - Pete Kloeber: Arizona, Grand Canyon, Luke, Northern Arizona, Superstition Mountain
- **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 and mentor ... 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 – only when beneficial ...
- Round Tables – 1st Fridays @ 1000 hours
- Chapter Newsletters – sharing

MOAA/Board Perspective – Col Pete Kloeber

MOAA's Top Challenges

- MOAA Long-Term Financial Stability
 - MOAA: \$166.7M
 - MOAA Scholarship Fund: \$175.5M
 - The MOAA Foundation: \$930.4K
- MOAA Foundation Stability
 - Need donations or endowment to help cover program costs
 - MOAA currently provides Grant to balance budget (~\$500K)
 - Project 2030 to end Grant
 - Endowment Goal \$1M (now \$175K)
 - Project end 2025 to reach goal
- Sustaining and Increasing MOAA Membership

- Overall membership is growing (basic)
 - 353,328
- Paid membership continues to decline
 - Down 38% in last 12 years
- Chapter System Viability
 - Chapter members are our most involved advocates
 - Chapter membership is declining
 - Down 8% from 2024
 - Goal: 1% growth per year above attrition
 - 2025 accessions: 2,594 (cover attrition of 2,256 + 1%)
- Strengthening MOAA's Brand and Reach
 - Synchronizing and maximizing MOAA engagement is essential to meeting advocacy, revenue, membership, and philanthropic goals.
 - Engagement Score
 - Number of members who connect, take-action or interact with at least four different touch points: publications, digital engagements, purchase or connect with benefits, utilize services, transition experiences and member service center contacts.
- Maintaining Key Advocacy Positions & Mission Focus
 - Key earned benefits in health care and compensation continually under budget pressure and non-mission centric distractions.

Major Gene Wikle proposed to Col Pete Kloeber several recommendations for recruiting/ membership.

- Chapters offer a one-year free chapter membership to new member joining MOAA.
- MOAA provide the chapter and contact information to the new member.
- New member information would be sent to chapter.
- Chapter would contact new member.
- After one year of free membership, chapter would contact member to invite them to pay dues for a second year.
 - **Action Item #2**

Governance

501 (c) (19) Veterans' Organizations

- **A veterans' post or organization must meet the following requirements to be exempt under Section 501 (c) (19)**
 - At least 75 percent of its members must be past or present members of the armed forces of the United States and ...
 - The "substantially all" of the other members must be individuals who are cadets or are spouses, widows, widowers, ancestors or lineal descendants of past or present members of the armed forces or of cadets.
- The "substantially all" requirement above, was interpreted as limiting to 2.5 percent of the total membership of any veterans' organization, exempt under IRC §501 (c) (19),

individuals who are not cadets or past or present members of the Armed Forces, or the spouses, widows, or widowers of such members or cadets.

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

Governance 501 (c) (19) War Veterans' Organization

- **At least 90% of the organization's membership must consist of war veterans**
 - The term war veterans mean persons, whether or not present members of the U.S. Armed Forces, who have served in the U.S. Armed Forces during a period of war (including the Korean and Vietnam conflicts, the Persian Gulf war, and later declared wars).
- Chart is included with minutes and included with presentations emailed to council officers and staff, chapter presidents, past council presidents, and all other attendees.

Tips for Good Governance

- Avoid Conflicts of Interest – disclosure, recusal, or other remedial action
- Personal Inurement is Prohibited
- MOAA and those acting for MOAA may not engage in partisan political activities
 - MOAA may not support or oppose any particular candidate or political party
 - You may engage in partisan political activities as an individual
 - MOAA is authorized to lobby and to take action to **influence legislation**

Influencing Legislation

- The following activities fall within the authorized purposes of a Sec. 501 (c) (19) organization
 - Reviewing proposed legislation that may affect veterans at both the federal and state level
 - Testifying before a governmental body with respect to such legislation
 - Informing members about proposed legislation

Government Relations

- Enduring Priorities
 - Issues we will always advocate for, until passed, even if they are not among our day-to-day priorities, such as concurrent receipt for combat wounded (Richard Star Act), Arlington National Cemetery access, COLA and restoring BAH to 100%
- Redline Issues
 - Issues that we continually monitor and will immediately mobilize the entire association, our membership, the MSO/VSO community, and our allies to protect, such as
 - Decrements to scheduled pay increases as defined by law
 - Any new TRICARE or TRICARE Pharmacy Program fee

- TRICARE cost sharing increases that exceed military retired pay COLA or TRICARE Pharmacy Program cost sharing that exceeds common industry practice
- Unequal decrements of compensation and benefits based on rank, age, family composition, retirement status, or disability benefits

Tiered Approach

- Tier 1
 - Advocacy priorities for the current Congress. This is our continuous and dominant messaging and will be MOAA's Advocacy in Action topics
 - Actions team will take: Produce engagement plans, actively advocate, develop communication and marketing plans, provide quotes, produce one-pagers, create and promote calls-to-action (CTAs)
- Tier 2
 - Secondary priorities that MOAA is actively pursuing and working
 - Actions team may take: Provide periodic coverage, possibly produce one-pager and CTAs, and provide quotes, coordinate with Communications Department for news coverage/articles as appropriate
- Tier 3
 - Issues we are not actively pursuing or working, with no formal messaging
 - Actions team may take: Sign letters of support, coordinate with Communications Department for news coverage/articles as appropriate

Criteria for Advocacy Priorities

- Fit with MOAA Mission
- Expertise
- Momentum
- MOAA Member Interest
- Cost

19th Congress Tier 1 Priorities

- Currently Serving
 - Unaccompanied Housing Improvements
- Retirees/Veterans
 - **Ending the Wait Report Priorities**
- Family/Survivors
 - **Military Spouse Hiring Act**
- DoD Health Care
 - MHS Stability Through Accountability
- VA Health Care
 - **Caregiving Support Improvements**

How Can We Help?

MOAA Legislative Action Center

MOAA Legislative Action Center

- Charts are included with minutes and included with presentations emailed to council officers and staff, chapter presidents, past council presidents, and all other attendees.
- Quarterly Engagement Report
 - Council and Chapter Legislative Leaders Webpage
 - <https://www.moaa.org/legisleaders>

MOAA's Simple Message

- “IF YOU REALLY WANT TO THANK THEM FOR THEIR SERVICE, PROTECT THEIR EARNED BENEFITS.”

Scholarship Fund – 2025 – 2026 School Year

- \$18.7M
 - Loans - \$11.8M
 - Grants - \$6.9M
- 1,86 students of military families
 - Increase of 546 from 2024 and 1,087 from 2023
- Qualifications
 - All children of military families except former enlisted
 - Less than 24 years of age
 - 3.0 GPA (maintain 2.0 GPA)

MOAA's Newest Virtual Chapter

- MOAA Public Affairs and Communication Professional Virtual Chapter (VC-7) – chartered in October 2024
- **Mission:** Promote MOAA's purpose and objectives by enhancing the effectiveness of communications among MOAA Councils and Chapters across all media platforms
- <https://www.mpacomvc.org>

People's Conference

Total Force+

- Preserving the “All-Volunteer Force”
- Themes
 - Talent management and innovation for both the military and civilian workforce
 - Leadership development and performance
 - Quality of life for military families
 - Enhancing the veterans' and retiree experience

- Schedule
 - Year 1: 28 – 30 October 2025
 - Venue: Gaylord National Resort & Convention Center
 - Year 2: 1-3 February 2027
 - Year 3: 31 January – 1 February 2028
 - Year 4: 29 January – 1 February 2029 (soft hold)
 - Year 5: 4 – 8 February 2030 (soft hold)
- Website: www.totalforceplus.org effective 1 November

Membership

- Age
 - 60% > 60
 - 26% > 80
- Total Members
 - EOY 2024 = 353,328
 - EOY 2027 = 311,729
- Chapter Members
 - EOY 2024 = 35,325
 - EOY 2027 = 27,496
- Paid Members = down 38% last 12 years
- Gift Memberships
 - Start with Academy and ROTC Graduations – graduates and families
 - Eventual functionality at moaa.org

Key Takeaways

- Stabilizing MOAA long term financial position is staff's top priority
 - Measured approach key to controlling risk
 - Multiple lines of effort required and ongoing
- Foundation and Scholarship are integral to MOAA mission success and vice versa
 - Central to long term membership inclusivity
- Stabilizing and growing membership is key to many areas – and contributes but IS NOT a standalone fix for revenue shortfalls
 - Chapter/Council membership replenishment also important
- **Main mission** “preserve and protect **earned benefits**” depends on getting all the “pillars” right

Key Dates – 2025

- Monthly: MOAA Roundtables – 4th Thursday, 7 pm (Eastern)
 - May 29* – Chapter Health
 - June 26 – General Council Issues
 - July 24 – Recruiting and Retention
 - August 28 – MOAA Virtual Chapters
 - September 25 – Council and Chapter Mentorship

- October 23 – MOAA Foundation
- November 20* – MOAA Annual Awards
- December 18* – 2025 in Review/2026 Outlook
- *Adjusted to avoid conflict
- October 28 – 29: Total Force+

MOAA... and You Make a Difference!

Treasurer – Col Charlie Bitner

Col Charlie Bitner presented the treasurer's report. He stated that income comes from MOAA and dues. MOAA gives the Council money for travel, council meetings and our Zoom account. He said he is happy to report that the balance with Chase agrees with his figures.

AZCOC Financial Summary – May 2, 2025

Beginning Balance (12/31/2024)	\$8,653.60
Income to Date	\$3,303.50
Expenses to Date	\$395.38
Current Balance (05/02/2025)	\$11,561.72

Chase Business Complete Statement

- Overview/Account: BUS COMPLETE CHK (...7911)
- BUS COMPLETE CHK (...7911)
- ARIZONA COUNCIL OF CHAPTERS (MOAA)
- \$11,561.72
- Uncollected funds
- Transactions
- Showing
- Available Balance
- \$11,561.72
- Present Balance
- **\$11,561.72**

Legislative Affairs – Col Tom Waddell

Col Waddell had a few comments before his slide presentations (see slide presentations below comments).

- Be sure and follow the Strobridge criteria if you are submitting someone for the Strobridge award.
- Grassroot advocacy does work.
- When sending letters to your legislators, add a personal narrative.

- In every letter you send, add *“If you really want to thank them for their service, protect their earned benefits”*.
- Col Waddell called Senator Kelly’s office to talk with the senator about the ACES Act. Received a return call from Kelly’s staff who listened.
- Senator Gallego came to Flagstaff for a town hall meeting. He continues to support veterans.
- The money from specialty license plates is one way the VDF gets money.
- The VDF grant program has large grants and small grants up to \$4,999.99.
- The funds for VDF cannot convert to the general fund.
- The ADOA did an audit and put restrictions on how the VDF funds may be used.
- The ADOA made it too hard if you want to help individual vets. Cannot be used for basic needs such as water, food, gift cards. Not worth the effort to apply for even the \$4,999.99 grant.

Legislative Chair

- MOAA concentrates on national legislation (LAC) – we work state legislation
 - Strobridge criteria
 - Emphasize membership involvement in the LAC is important
 - Currently four top AIA priorities posted to the LAC
 - Templates for state issues
 - Request To Speak (RTS) enrollment
 - Monthly newsletter to chapter LLs
 - Urge your LL to communicate to your members monthly

Arizona Legislation

- CoC Legislative Advocacy Focus on five bills
 - 2 passes/3 remain in committee
- Successes – signed into law by Governor Hobbs
 - SB1021: Instate tuition for contracted ROTC Cadets
 - SB1424: Stolen Valor
- Still in committee
 - HB2672: Property tax exemption for 100% disabled veterans
 - SB1155: USPHS pay equity
 - SB1704: VDF allotment to state veterans’ homes

National Legislation

- AIA feedback
 - *“If you really want to thank them for their service, protect their earned benefits”*
 - Bipartisan legislation is difficult at best
 - Grassroots advocacy works!
 - Personal narrative helps
- Senator Gallego Flagstaff Town Hall
 - VA Benefits

- Continued access to care
- ACES Act – S201/HR530
 - Senator Kelly, Representative Pfluger (R) TX, Representative Stanton (D) AZ

ADVS VETERANS' DONATION FUND

- VDF
 - "... established in 1999 by the Arizona Legislature funds programs that benefit Veterans and their families throughout Arizona. Arizona State law specifies that tax-deductible donations to, and monies held in, this account can never revert to the State General Fund. The assets held in the account can only be used to benefit Veterans in the State of Arizona..."
 - "Applications must pertain to at least ONE of the categories of social determination of health which includes: **basic needs**, employment, **family** and social support, finances and benefits, higher education, housing and homelessness, legal, mental health and substance abuse, physical health and spirituality."
- VDF Small Grant: up to \$4,999.99
- Recent audit added restrictions and increased paperwork
 - Applications cannot mention families
 - Grant money cannot be used to purchase gift cards, water or food
 - Must have written documentation from VSO on how each veteran's status was determined
- Opinion: Currently not designed to assist individual veterans
 - May work for single project involving groups of veterans
 - Requires legislative action to change procedures.

Surviving Spouse – Mrs. Linda Wolverton

Surviving Spouse Corner

Surviving Spouse Update – May 2025

- **National Military Spouse Day – May 9, 2025**
- **Support Military Spouses**

7 May 2025 Update on Legislative Surviving Spouse Issues

- **HR2055 – 119th Congress (2025-2026) – HR2055 – as the Caring for Survivors Act of 2025 was reintroduced.**
 - **It would increase Dependency and Indemnity Compensation** paid by the Veteran's Administration to surviving spouses **from 43% compensation to 55% to equal other survivor programs.** If you are a disabled veteran, this bill could financially help your spouse. **It was referred to the subcommittee on Disability Assistance and Memorial Affairs on Wednesday, April 03-27-25.**
- **HR970 – Fairness for Servicemembers and their Families Act of 2025.**
 - **Requires the Secretary of Veterans Affairs to periodically review the automatic maximum coverage under the Servicemembers' Group Life Insurance program**

and the Veterans' Group Life Insurance program, and for other purposes.
HR970 as of April 7, 2025 (Passed the House).

- **Love Lives on Act of 2025.**
 - Reintroduced on February 5, 2025. This bill is the first stage of the legislative process. It will typically be considered by committee next before it is possibly sent on to the 119th Congress (2025-2027). Bill reintroduced on February 5, 2025.
- **Prioritizing Veterans' Survivors Act: - HR7150.**
 - In a rare 424-0 vote on 9 April 2025, the U.S. House has passed HR1228, the Prioritizing Veterans' Survivors Act, signaling strong bipartisan support for restoring the VA's Office of Survivors Assistance (OSA) to its original role under the Secretary of Veterans Affairs, reducing Bureaucracy and paperwork.
- **Survivor Benefits Delivery Improvement Act: - HR2278, March 21, 2025.**
 - The Survivor Benefits Delivery Improvement Act was reintroduced and would increase the monthly rate for dependency and indemnity compensation for the surviving spouses and dependents of military members and veterans who died as the result of their service-related illnesses and injuries. The act was referred to the Committee on Disability and Memorial Affairs. (Note: The previous Survivor Benefits Delivery Improvement Act of 2024 – HR7777 failed to pass Congress before the end of their term.)

Elizabeth Dole Home Care Act HR542/S141 PASSED January 25, 2025

- The Elizabeth Dole Home Care Act legislation would enhance the VA's program of long-term services and supports, and increase timely access to **both institutional and noninstitutional long-term services** to meet increasing demand
- The legislative package enhances access to vital mental health programs, while honoring veterans' choices for community care. Provisions also support surviving families with expanded education benefits and remove barriers for surviving spouses.
- The bill combats veteran homelessness through increased funding for housing, transportation, and caregiver support.
- Congressional Status: Elizabeth Dole Home Care Act **passed and signed into law.**

NEW TOPIC

The Veterans Last Patrol – See Summary of Program (Handout)

- Luke Chapter Surviving Spouses have begun participation
- Purchased cards from Amazon (under Veterans)

WE ARE ONE – HOW WE COMMUNICATE

- Organized Surviving Spouse Programs
 - Identify
 - Chapter State Liaisons – completed (Coronado has a new Liaison in Jimmy Clenney)

- Develop Relationships
 - Initial contact to all AZ Liaisons was made with the goal of sharing ideas for our local surviving spouse chapter meetings
 - Status: responses are being received from statewide liaisons
 - Goal: idea sharing
 - Virtual National Surviving Spouse Meetings – information to be forwarded to all chapter liaisons in the new year 2025-26
- AZ Council of Chapters – SS Representative: **Linda Wolverson**

WHO ARE WE? – Author: Linda Wolverson

- We are strong focused women who do the impossible every single day.
- We married men who were duty bound and determined to get the job done, whether on duty, were honorably discharged, or after military retirement.
- We are more than a label (widows of military men). While you know separation or loss happens, no one can ever prepare you for the hole your spouse leaves in your heart when they're gone. Being strong women, we learned patience and adaptability. We created memories that last forever. We have learned how to live life outside of our husband's shoes. But we kept the 'shoes', the memories, of our terrific experiences.
- We are supportive, loving, loyal, fierce, and reliable
- **We are military surviving spouses.**

Questions?

- Linda Wolverson, SS – linda.wolverson@lukemoaa.org

Personal Affairs – Mrs. Polly Parks

DoD & VA

- **DoD Civilian Hiring Freeze**
 - Beginning to impact readiness & Quality of Life Initiatives
 - Top-line number of Reduction in Force not released
 - **Rolling Deferred Resignations & pushing Voluntary Early Retirement Authority (VERA)**
 - **VERA legal: Deferred Resignations are not budgeted, but OMB is rebranding as Paid Administrative Leave. Unclear as to legality, as OMB guidance allows fully loaded pay even if an employee gets another job before September 30.**
 - Impacting Quality of Life services, Readiness and Morale
- **VA says the target is a 15% reduction in workforce, which will improve service and efficiency.**

2025 CR Reconciliation Package

- **Aims to plus-up Defense Spending \$150 billion through 2029**

- Includes \$9 billion for servicemember and family Quality of Life
 - **Sec. 20001 – Enhancement of Department of Defense Resources for Improving the Quality of Life for Military Personnel**
 - This section provides over \$7.3 billion in mandatory funding and \$1.24 billion in direct spending for the following purposes: to renovate military barracks and unaccompanied housing; to prevent shortages in the provision of healthcare services under the Defense Health Program; to provide supplemental payments of Basic Allowance Housing to military personnel; to extend eligibility for Temporary Lodging Expense Allowance from 14 to 21 days to cover out-of-pocket expenses for servicemembers undergoing permanent change of station; to expand educational opportunities and childcare fee assistance for servicemembers; to expand professional licensure assistance programs for military spouses; and to carry out additional activities under the Defense Community Infrastructure Program. This section also provides temporary authority for the military services to enter into public-private partnerships for the renovation of existing and construction of new unaccompanied housing.

Reconciliation Effects on Veterans

- **VA mark-up is not yet scheduled, but the overall net allowable increase is \$2.8 trillion through 2029**
 - **VA opened healthcare to all eligible veterans in December**
 - **Part of a government-wide initiative to deal with Blast Overpressure and other brain injuries, PACT Act expansions**
- **Cuts in other Departments are expected to impact the quality of life for veterans and their families, millions of whom rely on programs like SNAP, Medicaid, and the ACA**

What to Expect from Proposed FY2026 Budget

- **Proposed RIFs**
- **Cuts in Quality-of-Life Services retirees, veterans and troops utilize**
- **Privatization and more sole-source and non-compete contracts**
- **BETA rollouts of digital records; migration of human services to AI (i.e., call-centers)**
- **Depending on the fate of the Reconciliation Package proposed tax cuts and debt limit, possible cuts to earned benefits**

FY2026 Budget & Miscellaneous

- **Trump Administration to release proposed FY2026 budget mid-May**
- **Arlington Cemetery now requires a “Real ID” or other acceptable government ID to access the grounds**

Advocacy in Action – Col Tom Waddell

- One hundred and fifty volunteers were on the “hill”. Arizona’s team consisted of Col Pete Kloeber, CAPT Bruce Kosaveach, Col Tom Waddell and Mrs. Nora Durham. They were not there as Arizona representatives they were there as MOAA representatives.
- The volunteers logged 1200 hours of time.
- Fifty-five members of Congress were visited.
- Staff Arizona team met with all had some military connection.
- MOAA provided a packet which outlined their AIA items to be covered by the teams when they met with representatives or staff.
 - Military Spouse Hiring Act
 - Unaccompanied Housing Improvements
 - Improve Military Health System Access to Care
 - Ending the Wait Report Priorities
 - Caregiver Support Improvements

Old Business

- **Action Item #2 – Carried over from November 8, 2024 Meeting** – CAPT Chuck Vaughn will pursue locations and cost involved in having the council meetings in different locations.
 - Much discussion on pros and cons of changing the location
 - Suggested Prescott in spring and Colonnade in fall
 - Move around to different locations where we have chapters and tie the council meeting with a chapter meeting and have activities for spouses while the council meeting is going on
 - Be flexible, don’t lock in a specific area, check around
 - Moving location gives chapter members a chance to see what MOAA is about
 - Flagstaff is becoming a year-round recreation center; hard to find location to have meeting; hotels very expensive, as are restaurants and locations for meetings
 - Was changed to a central location because of driving distance
 - Change so that members can attend – comment made that even when it was in chapter area locations, members did not attend the council meetings

New Business

- A motion was made by CAPT Bruce Kosaveach and seconded by Mrs. Polly Parks to hold the November council meeting at the Colonnade and the May council meeting in South Tucson area. Motion passed. **(Vote #2)**
 - **Action Item #3**

Wrap up/Good of the Order

- Major Gene Wikle contacted MOAA and asked them to send out an email letter from Luke Chapter to non-chapter MOAA members residing in Luke Chapter’s catchment area, highlighting the Luke Chapter and all that they do. MOAA’s database said there

were 1,589 members in Luke's catchment area that did not belong to a chapter. When it came down to it, there were only 900+ of which MOAA only had email addresses for 300+. The email letter was sent and Major Wikle received zero responses.

- Share Chapter newsletters
 - All Chapters send their newsletter to the council president, vice president, secretary and treasurer and all the Arizona Chapter presidents.

Action Items

Action Item #1 – Mrs. Pam Wojtas to email copies of all presentations.

- **Complete** – Emailed presentations prior to distribution of minutes.

Action Item #2 – Col Pete Kloeber will contact MOAA with the recommendation that all new MOAA members become members of an Arizona Chapter.

Action Item #3 – CAPT Chuck Vaughn will pursue possible locations and costs for the Spring council meeting.

Action Item #4 – Col Pete Kloeber suggested forming a committee consisting of himself, Lt Col Darren Venters, Col Tom Waddell, CAPT Bruce Kosaveach and Mrs. Pam Wojtas to reassign the zip code catchment area which belonged to Superstition Mountain Chapter to other Arizona Chapters.

Action Item #5 – Col Pete Kloeber proposed a change to the bylaws since Lt Col Nicholas Knight, the immediate past president has moved out of Arizona. The motion made by Col Kloeber is to change the bylaws that voting members of the council must reside in Arizona. Motion was seconded by Col Charlie Bitner. Motion passed.

- **Complete** – Bylaws were amended May 5, 2025.

Respectfully submitted.

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

NEXT AZCOC Meeting – 7 November 2025 – The Colonnade, Surprise, AZ

Thursday, 1 May, 2025 Dinner Speaker: CAPT Chuck Vaughn

Thoughts on Chapter Membership

- Why does someone join an organization?
- What can an organization do to encourage people to join their organization?
- What should an organization do when someone joins an organization?
- What can an organization do to retain members?

Why Does Someone Join an organization

- 7 reasons people join a community service organization
 - A community service organization, or community service club, is a voluntary nonprofit group. Members of the group or club meet together to support charitable causes, to socialize, and to share educational and personal growth opportunities
 - Build your network
 - Gain valuable skills
 - Get the chance to do good
 - Take advantage of continuing education
 - Learn more about the world
 - Make new friends
 - Get great perks

Why Does Someone Join an organization

	National MOAA	Local Chapter
▪ Build your network	no	✓
▪ Gain valuable skills	no	no
▪ Get the chance to do good	no	✓
▪ Take advantage of continuing education	no	no
▪ Learn more about the world	✓	✓
▪ Make new friends	no	✓
▪ Get great perks	no	no
▪ Stay informed on organization issues	✓	✓

Areas to Focus on

- Build your network
 - Have new members introduce themselves, have members wear nametags, encourage discussion among members at lunch or dinner, have members share business cards, introduce chapter officers
- Get the chance to do good

- Engage in veterans support projects, solicit donations for projects, publicize projects and support provided
- Learn more about the world
 - Have good speakers at meetings, provide information in newsletters or websites
- Make new friends
 - Have new members introduce themselves, have members wear nametags, have members share business cards, introduce chapter officers, encourage members to introduce themselves to guests and new members
- Stay informed on organizational issues
 - Talk about advocacy and publish advocacy actions in newsletters and website, discuss upcoming support projects, talk about how members can be involved

What Can an Organization Do to Encourage People to Join Their Organization

- Support causes potential members care about
 - Supporting veterans and their families
 - Supporting active-duty personnel and their families
 - Awarding ROTC scholarships
 - Awarding JROTC awards
 - Note – people chose not to join an organization when there isn't a personal connection to the cause the organization supports. Make your causes known to potential members. Be sure potential members can connect with your causes
- Make themselves known
 - Partner with other organizations to gain exposure
 - Send newsletter(s) to prospective members
 - Publish articles in newspapers
 - Participate in Veterans Day, Memorial Day, and other events
 - Note – be sure your newsletters focus on the opportunities to do good (to serve), luncheons and dinners where people learn more about the world, and keeping members informed of organizational (veterans) issues
- Have a good legislative liaison
 - Keep members informed of actions they can take
 - Continually remind members how their participation can/did affect legislation
 - Make legislative advocacy easy for members
 - Note – my experience is we have to make legislative advocacy easy for people for them to participate. Remind them who their legislators are and how to contact them. Provide easy to follow instructions
- Have a good projects director
 - Plan a variety of support projects for member participation
 - Some projects can be financial support only
 - Take photos of member participation in support projects
 - Publicize support projects at meetings, in newsletter and website
 - Note – my experience is not many people will show up to provide hands-on-labor like painting a veteran's facility. Different people respond to different projects. Try to plan a variety of projects
- Give new members a free one-year membership

- Encourage members to join by giving them something free
- Help them to connect with other members of the organization
 - Note – it is more important to gain a new member than it is to add \$30 to your bank account.

What Can an Organization Do to Retain Members

- Have an onboarding plan for new members
 - An onboarding plan is essentially a roadmap for a member's first year in the organization
 - Make sure the first month is high contact. As soon as someone becomes a member, your organization should be in contact with them to welcome them right away. Whether you do this in person, over the phone, or even by mail, every new member needs to be recognized! Follow-up in the second month. Follow-up several months later to see how they are doing
- Communicate with members in a way that works for them
 - Not everyone wants to communicate the same way
 - The kind of communication you use depends on the type of members you have, their age, availability, and preferences. Use mail, email, social media, messages through your website, phone calls, or text messages
- Give the members what they want
 - Determine what the member wants out of their membership. Actively listen to your members
 - Get the member involved in what they are interested in – are they interested in hands-on projects, ROTC scholarships or JROTC awards, raising funds, attending lunches or dinners, or playing a more active role?
- Promote membership benefits constantly
 - Determine what your membership benefits are ...
 - Have a defined list of benefits on your website and include the list in your newsletter. People have a lot of ways to spend their time and money – constantly remind them of their membership benefits
- Manage membership dues
 - Membership dues must meet three basic requirements
 - They are affordable for your members
 - They correspond to the benefits that you offer
 - They cover the costs of those benefits and then some
 - Members need to see that their membership dues are being spent widely to support the organization's causes. People don't want to pay membership dues just to see the bank account grow – spend the money
- Create an online community
 - An online community is a place where your members can go to interact, whether that is through your website, social media, or messaging platforms such as Slack and WhatsApp
- Get to know your members
 - Perhaps the most important way to retain members is to get to know your members better!

- Ask about their military career – their experiences, where they served, what positions they held. Find out if they are interested in participating in projects, in legislative advocacy, in helping to plan future events, etc
- Follow their engagement
 - Tracking membership engagement is helpful because you can determine who has attended events and received communications. More importantly, it tells you who has been inactive and might need a little boost
 - Ask your membership chair to keep track of attendees at luncheons or dinners. If you haven't seen someone for several months you should follow up to see why they haven't been attending
- Make every member feel important to the organization
 - As president of the Catalina Mountains Chapter I emailed every member at least once a year to wish them a happy birthday
 - Get to know your members and then ask them about their interests. I'd ask Kurt about his riding in the El Tour de Tucson; I'd ask Bill about his pickleball game; I'd ask Deborah about her tennis game
 - Include hand-written notes when sending our membership renewal requests

References

- 7 reasons to join a community service organization
 - <https://www.operationwarm.org/newsroom/blog.html/article/2018/05/28/7-reasons-to-join-a-community-service-organization>
- Springly – how to increase membership in your nonprofit
 - <https://www.springly.org/EN-US/blog/increase-membership-in-nonprofit-organization/#retain>

Thanks for Coming!

- See you Friday, November 7th – somewhere in the Tucson area