



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

**0801 Hours, Friday, 7 November 2025**

**IN-PERSON MEETING HELD AT THE COLONNADE, SURPRISE, AZ**

**IN ATTENDANCE:**

**Arizona Council of Chapters:**

**President and Newsletter Editor:**

CAPT Charles Vaughan

**1<sup>st</sup> Vice President and President Arizona**

**Chapter:** CAPT Bruce Kosaveach

**2<sup>nd</sup> Vice President and President Luke Chapter:**

Major Gene Wikle

**Past President, National MOAA BOD and**

**Chapter Affairs:** Col Peter Kloeber

**Secretary and Membership:** Mrs. Pam Wojtas

**Legislative Affairs and President Grand Canyon**

**Chapter:** Col Tom Waddell

**Transition Liaison/ESGR:** Lt Col Darren Venters

**Surviving Spouse Advisory Council/2<sup>nd</sup> Vice**

**President/Surviving Spouse Liaison Luke**

**Chapter:** Mrs. Linda Wolverton

**Catalina Mountains Chapter:**

**President:** COL Kurt McMillen

**Coronado Chapter:**

**President:** LTC Ed Wozniak

**Treasurer/Director of Membership:**

CW2 Allen Goodman

**Guest:** Mrs. Donna Goodman

**Guest:** Mrs. Kaylee Nix

**Grand Canyon Chapter:**

**Assistant Membership Chair/Surviving Spouse**

**Liaison:** Lt Col Joyce Kloeber

**Guest:** Mrs. Sharise Waddell

**Green Valley Chapter:**

**President:** CW3 Jack Bundy

**1<sup>st</sup> Vice President:** COL Lee Staab

**Surviving Spouse Advisory Council/Surviving**

**Spouse Liaison:** Mrs. Nora Durham

**Luke Chapter:**

**Secretary/Compliance Director:**

Col Mike Kramer

**Northern Arizona Chapter:**

**Director At Large:** COL Jerry Wojtas  
**President:** LCDR Clyde Meade

**Speaker:**

**National MOAA Vice President, Council/  
Chapter and Member Support:**  
CAPT Jim Carman

## **Administration**

**Call to Order:** CAPT Chuck Vaughn called the meeting to order at 0801.

**Invocation:** The invocation was given by CW2 Allen Goodman from Coronado Chapter.

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

### **Attendance/AZCOC Master Roster Update – Mrs. Pam Wojtas**

- Mrs. Wojtas confirmed that there was a quorum. She also stated that she is passing around an attendance roster for attendees to sign.
- Chapter Officers Roster Update – 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.

### **Approval of Minutes for Fall 2025 AZCOC Meeting – Mrs. Pam Wojtas**

- Mrs. Wojtas stated that she had received no corrections to the minutes. She asked the attendees if they had any corrections. Hearing none, Mrs. Wojtas asked for a motion to approve the minutes. A motion was made by CAPT Bruce Kosaveach and seconded by Col Tom Waddell. Motion passed. **(Vote #1)**

### **President's Opening Comments/Introduction of Guests – CAPT Charles Vaughn**

- CAPT Vaughn welcomed everyone to our Fall Meeting. He introduced our Guest Speaker, CAPT Jim Carman from National MOAA.
- Housekeeping
  - CAPT Vaughn asked that cell phones be turned off or placed on vibrate.
  - He told attendees that if they needed to get up any time during the meeting to please do so.
  - He asked Col Pete Kloeber to remind everyone of those eligible to vote.
- Maximum Eligible Voting Members for Council – total 15

- Council Officers (5)
- Chapter Presidents/Representative (9)
- Immediate Past Council President (1)
- If a council officer is also a Chapter President, only one vote
- Total eligible voting members at meeting (10)

### **MOAA Awards – Col Pete Kloeber**

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

- Really good news – Chapters were really well represented at the Arizona Veterans Hall of Fame induction ceremony
- Five out of fifteen inductions were from three Arizona Chapters of MOAA; Arizona, Coronado and Luke
- Now have 128 MOAA Chapter Members of the total inductees of 534 (24%)

### **ARIZONA VETERANS HALL OF FAME**

#### **Class of 2025**

Arizona Chapter:	Bruce Kosaveach, CAPT, USN (Ret) Kathryn Gallowitz, Lt Col, USAF (Ret)
Coronado Chapter:	Frederick Mueller, MAJ, USA (Ret) – <i>Posthumous</i> Trisha Thompson, CW5, USA (Ret)
Luke Chapter:	William Simon, LTC, USA (Ret)

### **ARIZONA VETERANS HALL OF FAME**

Total inductees: 534

**MOAA Chapter Members: 128 (24%)**

### **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*

**Arizona members received award 3 of last 5 years**

## MOAA Levels of Excellence Awards for 2024

### 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 ...
  - 21 = Arizona
  - 19 = Luke
  - 16 = 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

### 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

## Guest Speaker: CAPT James Carman

CAPT Carman said he was honored to be here representing General Brian Kelly.

He had a few comments prior to his presentation

- Thanked everyone for being actively engaged within the community for many years
- He is in his 13<sup>th</sup> year at MOAA
- Congress currently has only 100 members who have worn the uniform
- MOAA has four ways they raise money
  - Investment Income
  - Dues
  - Affiliate Partners such as USAA
  - Membership

## General Brian Kelly

- Has visited a number of our councils and chapters and is in his third year in the helm
- Brings energy and enthusiasm to his role
- Last job in the Air Force included responsibility for the people and family programs that are the core of MOAA's mission
  - Perfect assignment to prepare him to take the reins at MOAA

## A Look Back

- MOAA's work was critical in securing Tricare for Life. Throughout the 1990s MOAA fought for legislation to pay out-of-pocket medical cost for military retirees enrolled in Medicare
- In 2001, Congress finally funded Tricare for Life
- MOAA spearheaded passage of the Post 9-11 GI Bill with education transferability to family members
  - While it didn't affect many of us, it's a big deal for the 9-11 generation who served
- MOAA led the charge to defeat the 1% COLA reduction for younger retirees contained in the 2013 Budget Control Act – passed literally in the middle of the night
  - To put this in perspective, this repeal saved a typical O5 retiree \$124,000 in the first 20 years of retirement
- MOAA championed elimination of the Social Security offset to SBP income – boosting survivors' annual compensation by an average of \$9,000 per year
- MOAA was a key player in the 50-year effort to improve SBP and to repeal the "Widows Tax"
- The SBP/DIC offset ended in February 2023 providing up to \$13,000 per year for about 67,000 surviving spouses – officer and enlisted – many of whom are parenting young families
- Expanding health care for multi-era veterans is another important achievement, especially those exposed to toxic chemicals such as Agent Orange, burn pits, and other toxics which resulted in certain cancers and illnesses
- A number of MOAA's state councils have been successful in exempting or reducing the percentage of military retired pay and survivor benefits subject to state income taxes
- MOAA hopes you see the immediate value of the association

## Advocacy Results

- MOAA has earned the Top Lobbyist designation from *The Hill* newspaper for 18 consecutive years – only one of our peer associations to be recognized with this honor
- Government Relations Team continued to build on the momentum from the 2024 Quality of Life Report – led by Representative Don Bacon from Nebraska and Representative Chrissy Houlahan from Pennsylvania
- The Government Relations Team and General Kelly were regular visitors to Capitol Hill, the White House, and the executive departments this year – completing 217 impactful meetings with the Pentagon, Veterans Affairs, Defense Health Agency, and key congressional leaders – 217 that's an amazing number
- Government Relations Team regularly meets with military health system contractors including Humana Military, TriWest, HealthNet, Express Scripts and others to share feedback from our membership and advisory councils
- MOAA led the charge last year to champion the 14.5% pay raise for junior enlisted personnel, even as some well-known enlisted associations withheld their support

- MOAA championed improvements in government housing and advocated for and achieved implementation of a Tenant Bill of Rights to provide protections for military families in privatized family housing
- Championed full restoration of Basic Allowance for Housing to ease out-of-pocket costs for servicemembers and their families – achieved passage of a temporary measure that provided \$2.9 billion for BAH restoration
- Continued efforts to monitor PACT ACT implementation as nearly 1.4 million claims were approved for veterans suffering toxic-exposure-related illnesses and their survivors
- MOAA successfully advocated for the GAO report on the impact of pharmacy network cuts on beneficiaries
  - Our persistent advocacy on this topic led the Defense Health Agency and Express Scripts to renegotiate contracts with many independent pharmacies
- Championed passage of the Elizabeth Dole 21<sup>st</sup> Century Veterans Healthcare and Benefits Improvement Act which expanded benefits and enhanced services for veterans and their caregivers
- The Government Relations Team is on Capitol Hill everyday reminding members of Congress and their staffs of the importance of Tricare for Life as a retention tool and to keep faith with those who have served
- Continue push to build support for passage of the Richard Star Act to extend concurrent receipt to service members unable to complete 20 years of service due to combat injuries
- Need your help – go to [MOAA.org](http://MOAA.org) today and register in our Legislative Action Center

## **The MOAA Foundation**

- An important priority for General Kelly is strengthening the MOAA Foundation
- The Foundation funds programs serving the entire military and veteran community, most notably our Community Outreach Chapter Grant Program and other proven programs that prevent and protect veterans and their families from crisis
- Each year since 2017, The MOAA Foundation has awarded grants to support chapter-based community service initiatives
- The grants totaled over \$129,000 in 2025 and were awarded to 55 chapters to fund impactful local programs to serve the military and veteran community
- The Foundation also supports a Crisis Relief Program, providing individual assistance to veterans and servicemembers in areas of declared emergencies
  - In many cases, these grants are identified by Chapter Members
- The MOAA Scholarship Fund awarded over \$18 million in grants and loans to more than 1,800 deserving students for the 2025/26 academic year

## **Membership**

- Sustaining and increasing membership remains a top priority for MOAA in 2025
- Solving the membership challenge is critical as we work to position MOAA for a strong and healthy future
- Of our 350,000 members, nearly half (165,000) are Life members.

- We continue to encourage our Basic members to consider making the financial commitment to MOAA through an annual Premium membership or a Life membership
- Our efforts also focus on bringing younger officers into our ranks, with a specific emphasis on the 40 – 60-year-old officer for whom we have a strong value proposition
- MOAA is actively working to recruit and retain officers of all demographics, as well as surviving spouses
- Import to note that surviving spouses are full members of MOAA; they number more than 44,000 and they fill a number of critical volunteer leadership positions throughout our council and chapter system
- There are no quick solutions to the membership challenge and growth will be incremental
- MOAA's marketing strategy continues to evolve as they introduce new campaigns and identify trends in data and new opportunities

### **Council and Chapter System**

- Another top challenge identified by General Kelly is strengthening our Council and Chapter System
- MOAA's nearly 400 affiliates – councils, chapters, satellites and virtual chapters are critically important to our success
- There are 180 chapters doing well, 80 trying and the others just paying homage to the old glory days and don't add much to MOAA
- MOAA chapters make important contributions advancing and supporting our legislative advocacy agenda, growing membership and supporting military and veteran focused initiative in their communities
- ROTC and JROTC program support is an area where many MOAA chapters are having significant impact with nearly \$1,000,000 contributed annually by MOAA's geographic and virtual chapters nationwide to ROTC and JROTC program support
- MOAA offers training programs designed to connect our council and chapter leaders with association leadership
- MOAA has hosted two virtual workshops in March and August and one in-person chapter leader workshop on May 2 and 3 in Oklahoma City
- Our second and final workshop for 2025 is scheduled in Hershey, Pennsylvania on November 14 and 15
- MOAA expects to visit the West Coast and Southeast U.S. with in-person chapter leader workshops in 2026

### **Total Force Plus People Conference**

- We conceived of Total Force Plus as our best answer to address many of our strategic challenges
- Most likely, Total Force Plus will help build the MOAA brand in front of new audiences, grow membership, build support for our MOAA charities and spotlight many of our advocacy priorities in front of an influential audience



- And, thanks to the support of our Maryland Council, we will highlight the contributions of our council and chapter network on the exhibit floor; their efforts last month led to 28 new members for their chapters
- MOAA was confronted with significant headwinds that complicated nearly every aspect of planning our inaugural Total Force Plus conference
  - Delayed confirmations of political appointees in the Pentagon and the Department of Veterans Affairs; challenges of attracting sponsors and exhibitors to support an inaugural event; complications of a government shutdown
- It has been said, “What doesn’t kill you makes you stronger”, and I’m so proud of the way the MOAA headquarters’ team overcame significant headwinds to execute a successful event
- 2,727 registered for the conference and 1,404 attended
- Among 247 survey responses received to date, 97% were very satisfied or highly satisfied with their conference experience
- Total Force Plus was designed to be solutions based and had four goals
  - Strengthen leader development in the All-volunteer Force
  - Improve recruiting and retention
  - Support the military family
  - Improve the veteran and retiree experience
- MOAA is compiling lessons learned and identifying key topics for our next Total Force Plus conference scheduled at Gaylord National Harbor, Maryland on February 1 and 2, 2027
- The shift to a winter cycle for our annual Total Force Plus conference brings several advantages
  - Deconflicts us from the major military-affiliated conferences scheduled annually in the fall
  - Times our conference to coincide with the convening of the 120<sup>th</sup> Congress following the fall 2026 mid-term elections
- MOAA will keep everyone informed as the plans for the second Total Force Plus conference comes together over the next 15 months

## **Privacy Policy Update**

- A very complicated process
- Consulted outside privacy policy experts
- Merging lists from three databases and two prior versions of the privacy policy
- 251,000 members notified of the change and we’re in the 30-day waiting period for members who wish to opt out – 1,500 opt-outs so far
- Expect to receive recommended communications procedures in mid-November – contact information of non-chapter affiliated members to be shared in early December

## **Board Service Opportunities**

- There are 35 national board members
  - Will need eight new members in 2026
  - Board meets in person twice a year and virtual twice a year

- One surviving spouse will be elected
- Process to select a new board class begins in January with an announcement in the *Military Officer* magazine
- Looking for the range of expertise needed to run a 21<sup>st</sup> century professional association
- The process is very similar to the selection board system we grew-up with in our military service
- Please consider volunteering to serve on the board

## **Preparing for the Future**

- With your help and through the work of our 84 national team members and 35 board members, MOAA is facing the future with optimism and vision to execute our mission to preserve and protect earned benefits for veterans, the currently serving, their families and survivors

## **Councils and Chapters**

- How does your work at the council and chapter level help MOAA
  - By finding innovative ways to recruit new members into MOAA and into your chapter
  - By raising awareness of MOAA and your chapter in your community – largely through community service and engagement
  - By being an engaged advocate – registering in the LAC – participating in other advocacy initiatives at the federal and state levels
  - By staying connected with us – subscribe to the weekly electronic newsletter and let us know how we can better serve you – and keep sending stories, photos, and fresh ideas for publication
  - By being the face of the association in your local communities; the national team is working hard to support your efforts

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## **Chapter Updates (Alphabetical Order)**

### **Arizona Chapter (AZ01)**

#### **Leadership Succession**

- President – Bruce Kosaveach
  - Completing second year in December 2025
  - Will begin 10th year on the BOD
  - Third year presidency – trying to catch up to Gene
- First Vice President/Membership Chair – Bob Fiegl
  - Completing fourth year in December 2025
  - Will remain for a fifth year beginning January 1, 2026

- Second Vice President – Dan Arroyo
  - Completing second year December 2025
  - Will take over as Membership Chair in 2026

### Membership – (2024 vs 2025)

- Numbers – Total 122/120
  - Regular – 104/103
  - Surviving Spouse – 18/17
  - Honorary – 1/2 (does not count in total numbers)
- Year over year analysis
  - Gained 14 new members (so far) in 2025
  - Have not offset losses. Delta is -2
- The BOD **does not carry delinquent members** year over year.

### CM Knowledge/Use

- Bob Fiegl – First VP and Membership Chair
  - Very strong in knowledge and use for updating membership in CM
  - Actively uses NRT reports for recruiting
- Bruce Kosaveach – President
  - Actively uses NRT reports (when available) for recruiting

### Successes

- Increasing our engagement remains a focused goal (discuss definition of engagement and what it entails)
- We have achieved our goal of increasing engagement by over 20%
- Average 34% of our members regularly participate in our monthly meeting/luncheon and other events – increase from 27% in 2024
- Increasing engagement will remain a priority goal in 2026, e.g. MOAA Foundation Community Outreach Grant event

### Challenges

- Six years past successful use of MOAA Foundation Community Outreach Grant funds
  - Worked with three non-profits with good community impact results
- Now need new and fresh idea for utilizing future funds with new non-profits
  - Increased engagement from our chapter to participate
  - Better chance of increased grant monies

### Programs/Activities

- 7<sup>th</sup> Annual Army-Navy Game
  - Second Saturday every December; Partner with SWVCC
  - MOAA is an organization of officers, not for officers
  - Held at Zips Sports Bar & Grill, Scottsdale (new location)

- Sold “Seven Boards” of 100 squares each last year; \$5 a square
- Netted \$1,068 income
- Beyond \$, great energy, enthusiasm, interservice rivalry, and we usually recruit one or two new members every year

## **Legislative Activities**

- Aggressively encouraged Legislative Action Center engagement
  - Include direct MOAA AiA link in monthly newsletter (shared with CoC)
  - 95 members registered (79%) (as of 9/30/25)
  - Attended 2025 AiA in Washington DC
- Lee Lange keeps members informed of Federal and State issues in our monthly newsletter *The Sentinel*

## **Goals**

### **Goal Progress from last CoC meeting.**

- One 2025 Goal: Increase Member Engagement by 20%
  - 26% increase in members at meetings (43) and events (34)
  - Engaged members are involved members
- We have retained this as our priority #1 goal from 2023

### **New Measurable Goals for 6-12 Months.**

- Add eCommerce ability for members to participate in silent auctions, service rivalry board square fundraising, chapter apparel, etc.
- Goal completed: Added additional site for donating separately to AZ Chapter Scholarship Fund

## **Other**

- One Optional Item: Fundraising
  - Silent auctions at Member meetings - \$2,540
  - Happy Hour events netted - \$1,005
  - Annual Service Academy Football Games
  - Fantasy Golf – scratch cards
  - Dedicated Campaign for our Scholarship Fund - \$10,452
  - Anonymous member gave \$4K for matching
  - Celebrate AZ Chapter’s 70<sup>th</sup> anniversary – October 2026

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## **Catalina Mountains Chapter (AZ12)**

### **Leadership Succession**

- This is our #1 focus issue
- Conversely, new member recruitment and retention is steadily increasing

## **Membership**

- Numbers
  - **01/01/25:** Regular: 65; Surviving Spouses: 6; Non-MOAA: 0
  - **10/07/25:** Regular: 74; Surviving Spouses: 6; Non-MOAA: 0
    - Includes 2 from Superstition Mountain Chapter
- Recruitment
  - 13 members added since 1/1/25
    - Includes 2 from Superstition Mountain Chapter
- Retention
  - 4 members departed since 1/1/25
    - 1 death and 3 “too busy” who never attended any 2024 meetings
    - Most times we retain the Surviving Spouses

## **CM Knowledge/Use**

- Knowledge – strong; we use it (vs other more inefficient historical methods) as our baseline from which to adjust up or down.
- Position/Person Responsible: Lead: Don Timian (Membership Chair); Support: Kurt McMillen (President); Don and Kurt work hand-in-hand to manage.

## **Successes**

- Relationship with Esperanza en Escalante (transitioning of EEE homeless veteran residents to being independent)
  - This is our core Vision/Mission obligation

## **Challenges**

- Maintaining our (anticipated) momentum on leadership transition

## **Programs/Activities**

- Participation in:
  - Missing in American Program (MIAP)
  - Wreaths Across America Ceremonies
  - Folds of Honor Veterans Day Dinners at SaddleBrooke

## **Legislative Activities**

- Finally, growth in LAC participation
  - Although slower than I would like

## **Goals**

- **Progress on the ONE Goal from last Council meeting (May 2025)**

- Membership growth
- **ONE new measurable Goal in next 6-12 months**
  - Filling leadership vacancies and leadership retention/progression

## Other

- How can National MOAA help to incentivize chapter members to accept leadership positions?

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## Coronado Chapter (AZ02)

### Leadership Succession

	<b>TERM ENDS</b>
● President: Ed Wozniak	Standing for Reelection
● 1 <sup>st</sup> VP: Kyle Molloy	Spring 2026
● 2 <sup>nd</sup> VP: <b>(Tom Hessler)</b>	Vacant
● Secretary: Joe Puett	December 2026
● Treasurer: Allen Goodman	December 2026
● Director Membership: Allen Goodman	December 2026
● Director Legislative: James Clenney	December 2026
● Director Surviving Spouse: <b>(Jane Strain)</b>	Vacant
● Director Personal Support: Teresa Walsh	December 2026
● Director Scholarship: Kathy Youngblood	December 2026

### Membership

● Numbers		
	<b>November 2023</b>	<b>November 2024</b>
○ Life Members	71	76
○ Basic & Annual	156	176
○ Surviving Spouse	36	40
○ Honorary	5	3
<b>Total Members</b>	<b>268</b>	<b>295</b>

### CM Knowledge/Use

- Membership Director responsible for update/accuracy
- Used extensively – very familiar with system

### Successes

- Net Chapter membership continues to grow (^10%)

## **Challenges**

- Finding Members willing to assume leadership roles (“STP”)

## **Programs/Activities**

- Arizona Coalition for Military Families
  - Chapter instrumental in organizing 1<sup>st</sup> ever ACMF training event
  - Has sparked networking activities throughout the County with veteran support organizations

## **Legislative Activities**

- Email Blasts via MailChimp
- Inclusion of State/Local, as well as National issues
- Distributed to approximately 650 Members, Retirees and Other Veterans
- Have expanded our “Legislative Alerts” to include local VSO leaders
- Chapter can track opens, “clicks”, and actions taken on legislative alert emails

## **Goals**

- **2024 COUNCIL MEETING GOAL**
    - Increase meeting participation by 20%
  - **STATUS**
    - Integrated luncheons as well as dinner meetings
    - Did attract different faces... But totals remained relatively the same
  - **MEASURABLE GOAL FOR NEXT 6-12 MONTHS**
    - Decrease number of Chapter Officer vacancies
- 

## **Grand Canyon Chapter (AZ11)**

### **Leadership Succession**

- All chapter offices are filled
- 1 Director position up for election – Incumbent is standing for reelection

### **Membership**

- Numbers
  - Regular – 122
  - Surviving Spouse – 13
  - Honorary – 2
- Recruitment – Positive
  - 19

- Retention
  - 2024 - 126; 2025 - 132 – Lost 13, Net gain 6

### **CM Knowledge/Use**

- CM Knowledge – Strong.
- POC: Pete Kloeber – nationally recognized expert

### **Successes**

- 19 new members

### **Challenges**

- Retention/Participation

### **Programs/Activities**

- Five NAZ StandDowns: 220 volunteer hours

### **Legislative Activities**

- LL is also CoC Legislative Chair

### **Goals**

- Increased membership by 5% since last year
- 2026: Increase membership by 3% or more

### **Other**

- **Honorable Mentions**
  - Scholarship and Veterans Fund provided over \$18,500 in 2024 and expect to exceed that goal by year's end
  - GCC is co-sponsoring the Veterans Tailgate at the NAU Military Appreciation Football Game tomorrow
    - Nau will honor 14 members during the game

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### **Green Valley Chapter (AZ03)**

#### **Leadership Succession (ideally)**

- The Green Valley Leadership Succession is determined by our bylaws. We have amended the bylaws to include member spouses for board positions
- Succession should be as follows



- 2<sup>nd</sup> VP/Programs Director for two years
- 1<sup>st</sup> VP/Membership Chair for two years
- President for two years
- Immediate Past President and Chairperson for the Scholarship and Military Assistance Board for two years
- Board of Directors
  - Slated each November and presented to the membership for confirmation during our November dinner meeting
  - Sworn in and installed at our December dinner by the AZCOC President. Chuck scheduled this December
  - In 2026, with reduced board participation and very few options, board members will assume multiple positions in 2026
- **Unfortunately, our demographics do not support our succession plan, thus the same people end up with some of the same positions over several years**

## Membership

● Numbers	<u>As of Oct. 30, 2024</u>
○ National Members (Regular: Former & Retired)	45 (8 frm; 37 ret)
○ Surviving Spouses	6
○ TOTAL MEMBERS	51
○ Non-MOAA Member Registered Aux Dues Paying Spouses	21
○ Non-MOAA Honorary Members (not counted in totals)	3
● Recruitment	
○ New Members this past year	3
● Retention	
○ Losses as result of:	
▪ Moves	5
▪ Health problems, nursing home, inability to attend	9
▪ Deaths	2
▪ Individuals who have stated no longer wish to be members	12

## NOTES

- The Green Valley Demographics are continuing to erode membership numbers and ability to find board members
- NRT has yielded only one new member in past year
- Presentation/Exhibitions within the community have this past year yielded only one new member

## CM Knowledge/Use

- STRONG
- Our Membership Chair is responsible for CM along with President who are the two Managers

- *In 2026, current President will be Membership Director again, so strong continuity with CM*

## **Successes**

- Have developed a **new referral Program** with local Realtor within our Corporate Sponsor Program. Referrals resulting in sales and/or listings from any of our members results in half of the earned commission being donated to our Scholarship and Military Assistance Fund. We recently received an additional \$2,800 from this program

## **Challenges**

- **Aging population:** Deaths, moves to independent and assisted living, continued health problems (especially Alzheimer's/Dementia), older population does not want to participate, cannot get members to step up and serve on the board or to volunteer to help in any capacity, so same 5-7 people end up doing everything. **CHALLENGE IS: How to keep chapter operating in this environment?**

## **Programs/Activities**

- **Support to Military Education:** Scholarship and educational grant monetary support to local High School JROTC graduates and Veteran Students at the U of AZ. We have been able to provide up to \$10,000 in JROTC Scholarships to four area high schools and \$3,000-\$5,000 in Educational Grants to vet students at U of AZ through their Veteran Education and Transition Services Office

## **Legislative Activities**

- Fortunately, we have Darren Venters as our Legislative Liaison Director (Winner of the Colonel Steve Strobbridge Legislative Liaison Award!)
- Our success lies in Darren's long experience in working all aspects of State and National MOAA Legislative initiatives through contact with applicable State Representatives, Senator Gowan, and on a national level, with Congressman Ciscomani's senior staff. (Especially important in that Ciscomani is on the House Committee on Vet Affairs and House Appropriations Committee)
- Darren maintains knowledge of each bill at each level and provides timely updates to all chapter members, continually encouraging advocacy and use of the MOAA Legislative Action Center through his group member emails, updates on our website, and in his legislative articles which he writes for each of our newsletters

## **Goals**

- **GOAL SUCCESS**
  - We have met our previous goal to get additional higher dollar level donations to our Scholarship and Military Assistance Fund through encouraging our members who have IRA's which require them to withdraw their Required Minimum Distribution to

- use some of those funds as Qualified Charitable Contributions to our Chapter. We have achieved our goal of at least an additional \$5,000 from this initiative
- NEW GOAL
  - Remain a reasonably viable chapter through 2026
  - For Lee Staab to be providing this presentation next November to the AZCOC instead of him reporting that we can no longer function. Any help from others would be welcomed

## Other

- **“TURKEYS FOR TROOPS”** Program at Thanksgiving for selected military units at Davis Monthan AFB
  - Food drives for Troops and families throughout the year
  - Continue to support Homeless Veterans with items such as toiletries, clothes, and non-perishable food items
  - Continue to support young military mothers with knitted baby clothes, blankets, etc.
  - Work with VA Hospital for more initiatives such as our PTSD Coin Awards and our gift of tools to the Vets Sight Impaired Garden at the VA Hospital
  - Christmas Gifts for Teens through the Santa Rita Fire Department
- 

## Luke Chapter (AZ06)

### Leadership Succession

- Gene Wikle, Chapter President, July 2022 – June 2026
  - Extended term of service one more year to June 2026
    - Have announced will not seek another term. Have begun search for a new president.
- Current Vacancies – Legislative Liaison

### Membership

- Numbers – 151 – **declining membership (183 in 2023)**
  - Regular – 112
  - Surviving Spouse – 36
  - Non-MOAA – 3
- Recruitment
  - **Critical need for ongoing and successful chapter recruitment program and for chapter survival**
  - **Recommend discussion with MOAA National**
    - **What recruiting programs are in place to actively recruit the next generation of members?**
    - **What is being done to recruit the active duty, reserve and guard force into MOAA?**

- Retention
  - Contact any member who does not renew membership

### **CM Knowledge/Use**

- Chapter Membership Chair and Chapter President have basic skills to manage the module
- Chapter Secretary has read only privileges

### **Successes**

- Chapter Community Fund
  - Received \$10,000 donation from the Pebble Creek 9-Hole Golf Association for Veterans Relief Grant Fund and the Scholarship Fund
  - Donating 1,000 canned food items and \$2,000 in Commissary Gift Cards to distribute to active-duty airman and their families for the November “Turkey for Troops” food drive at Luke AFB
- Veterans Relief Grant Fund
  - Received \$202,046 in donations and grants since 2017
  - Awarded 132 Relief Grants to veterans since 2017
- Chapter Scholarship Fund
  - Awarded 21 college scholarships in 2025 (\$30,000).
  - Awarded 297 college scholarships since 2001 (\$423,575 in donations from chapter members and corporate sponsors)
- Chapter Surviving Spouse Program
  - A strong, vibrant program with 29 members. Surviving spouse assistance is provided to a surviving spouse when needed. Monthly luncheons and activities.
- Chapter Special Board of Directors Meeting – October 18<sup>th</sup>
  - A strong vibrant program with 36 members. Surviving spouse assistance is provided to a surviving spouse when needed
  - Host monthly luncheons and activities

### **Challenges**

- Recruiting members to serve as chapter officers and committee chairs
- Ongoing recruiting effort and better membership record management with MOAA

### **Legislative Activities**

- John Regni (Lieutenant General, USAF Retired) serving as interim chapter Legislative Liaison
- Activity recruiting a new legislative liaison

### **Goals**

- Recruit and train in the next six months new chapter president and committee chairs

- Partner with community associations to further promote chapter activities and increase membership. (Partner with Luke AFB, Fighter Country USA, & Luke Air and Space Association chapter)
  - Evaluate chapter programs – declining membership – what programs can the chapter continue to support financially and through volunteer support?
- 

## **Northern Arizona Chapter (AZ04)**

### **Leadership Succession**

- Two-year succession cycle. May serve two terms. Nominating Committee identifies candidates, membership input is encouraged. Election and installation of new officers is held in December
  - President – LCDR Clyde D. Meade, USN, Ret.
  - Vice President – Capt. Raymond Jordan, USA, Fmr.
  - Secretary – Mrs. Roberta Rice, Spouse
  - Treasurer – Lt Col Dick Jonas, USAF, Ret.
  - Legislative Affairs – COL Steve Woods, USA, Ret.
  - Personal Affairs – Lt Col Bob Wallace, USMC, Ret.
  - Membership Chair – LCDR Spencer O’Neal, USN, Ret.

### **Membership**

- Numbers
  - Regular – 46
  - Surviving Spouse – 4
  - Non MOAA - 1
- Recruitment
  - 06
- Retention
  - Stable

### **CM Knowledge/Use**

- Membership Chair is familiar with Committee Module and active participant, above average knowledge
- President is familiar with the CM

### **Successes**

- Community Involvement

## **Challenges**

- Volunteerism
  - Limited to a very small group in participation

## **Programs/Activities**

- Northern AZ VA Health Care System
  - Vietnam War Veterans Day Commemoration – March 28, 2025

## **Legislative Activities**

- Our Legislative Affairs Liaison, Steve Woods – Chairman, Prescott Veterans Commission
- This appointment gives our chapter insight to local veteran projects and proposed legislation of interest to state and local veteran issues
- Steve keeps the chapter informed via newsletter, emails and speaks at our BOD meetings

## **Goals**

- Progress on goal since last COC meeting
  - Advertising in our newsletter
- Goals for 2026
  - Increase NACMOAA presence in the area
  - Work with other Veterans Organizations

## **Other**

- NAC oversaw the registration table at the Prescott Stand Down for the sixth year in a row. We had a very successful year helping nearly 150 local veterans (until the rains hit). Thank you to the NAC members who participated

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## **Tucson Chapter (AZ08)**

### **Leadership Succession**

- Current President – Ann Hollis
  - Currently serving a two-year term (2025-2026)
- First VP
  - Vacant
- Second VP – John Davee
  - Not likely to run for President in 2027
- Treasurer, Secretary and Membership Chair positions filled.

## Membership

- Numbers
  - Regular Members – 30
  - Surviving Spouses – 14
  - Non-MOAA Member – 0
  - Total – 44
- Recruitment: recruited 4 new members in 2025
- Retention: 100% of members continued their membership

## CM Knowledge/Use

- Primary CM user is the membership chair
  - Knowledge/use of CM is OK
- Chapter president knowledge/use of CM
  - Knowledge/use of CM is weak

## Successes

- Awarded three \$2,000 ROTC scholarships
  - Scholarships awarded to Army, Navy, and Air Force ROTC students at the University of Arizona
  - Scholarship presentations made at April monthly luncheon

## Challenges

- Recruiting new members
  - Trying to recruit new members from the Vail area (southeast of Tucson)
  - Vail area has over 100 National MOAA members
  - Only 2 new members have joined the chapter

## Goals

- Award three \$2,000 ROTC scholarships in 2026
- 

## Yuma Chapter (AZ10)

### Leadership Succession

- **President: Jim Adler**
  - Assumed presidency 1 January 2025 for 2-year term
  - No clear successor for chapter president
- **First VP: Vacant**
  - Limited pool of personnel hinders filling this position
- **Second VP: Position does not exist**

## **Membership**

- **Numbers**
  - Regular members 20
  - Surviving spouses 4
  - Non-MOAA 0
  - Total Members 24
- Recruitment
  - New members added this year 2
- Retention
  - 100% retention of members last year

## **CM Knowledge/Use**

- **Chapter Membership Chair**
  - Responsible for managing the Committee Module
  - Strong knowledge of using the module
- **Chapter President**
  - Also access Committee Module
  - Strong knowledge of using the module

## **Successes**

- Chapter awarded a \$1,000.00 scholarship to a deserving high school senior

## **Challenges**

- Extremely limited number of willing and able volunteers for committee leadership or chapter leadership. Three people perform most of the chapter's leadership functions

## **Programs/Activities**

- Assumed support of the new Yuma High School Army JROTC program
- Continue to support the Kofa High School Marine Corps JROTC program

## **Legislative Activities**

- Members are encouraged to stay up-to-date on state and national legislative issues targeted by National MOAA

## **Goals**

- **Previous Council Meeting Goal**
  - Run the new JROTC scholarship concurrently with the Graduating Senior Scholarship for the final year of the Graduating Senior Scholarship program



- Goal met – and have added support to a second JROTC program
  - **New Goal**
    - Recruit new energetic members to the chapter to assume some of the leadership roles
- 

## **Staff Updates**

### **Treasurer – Col Charlie Bitner – presentation given by CAPT Chuck Vaughan**

CAPT Vaughan had a few comments from Col Bitner

- Received additional monies from National to cover meetings so had higher than anticipated National MOAA direct payments
- Considerably more travel this year than previous years by officers – accounts for the higher expenditures for Officer Travel
- Spent more on WEB Services due to paying Jill (our web support) for 2024 and 2025

### **2024 Budget – Recap**

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

### **Cash Flow – Year to Date: 1/1/2025 through 10/13/2025**

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

### **Net Worth – As of 10/13/2025**

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

### **2026 Budget**

- The budget proposal was presented by CAPT Chuck Vaughan
- Budget slide shows some adjustment based on this year to include higher anticipated officer travel expenses
- Also shows reduction in anticipated donations
- Shows a \$2,000+/- imbalance between income and expenses – a good deal of that will be covered by member payments for the meetings, which help make up for the Meeting Venue Expense
- Chart is included with minutes and included with presentations emailed to council officers and staff, chapter presidents, past council presidents and other attendees.

A motion was made by Col Pete Kloeber and seconded by Col Tom Waddell to accept the 2026 Budget. Motion Passed **(Vote #2)**

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## **Legislative Affairs – Col Tom Waddell**

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

- New guidelines have been announced for the Colonel Steve Strobridge Legislative Liaison Award
- Make sure when you're filling out the application for this award, you answer the questions. This is the biggest reason applications are not acceptable
- Take time to make the application look like it's a winner
- When asked, send out the legislative letters from National MOAA. Personalize before sending

## **AZCOC Legislative Chair**

- Track state legislation and encourage chapter support through Chapter LLs
- Monitor MOAA National legislative priorities
  - Encourage chapter support via MOAA Legislative Action Center (<https://moaa.quorum.us/>).
- Develop relationships with AZ VSOs
  - Work with State Veterans Caucus in developing veteran focused legislation

## **MOAA Legislative Action Center (LAC)**

- Success of MOAA legislative priorities depend on member participation
  - Educate legislative members at all levels
  - Personalize correspondence to add emphasis
  - Follow MOAA legislative priorities – stay active in the LAC
  - Chapter leadership push for active participation
- Encourage chapter members to promote LAC
  - GCC business card
  - Encourage non-members and VSOs to use LAC

## **Arizona Legislative Action**

- USPHS pay equity legislation has failed to pass again in 2025
    - It will remain an AZCOC legislative priority
  - Actively working to reform RTS registration process
    - Briefed the AZ House Veterans Caucus
    - Letters to all AZ Senate and House Leadership
    - Working with Senator Rogers and Representative Travers
    - LLs have a sample letter for members
-

## Surviving Spouse Liaison Report – Mrs. Linda Wolverton

### 6 November 2025 Update on Legislative Surviving Spouse Issues

The following legislative proposals affecting Caregivers and Surviving Spouses failed to move forward: Congress on Shut Down

- **HR 2055 – 119<sup>th</sup> Congress (2025-2026) The Caring for Survivors Act of 2025**
  - It would increase Dependency and Indemnity Compensation paid by VA to surviving spouses from 45% of 100% disability compensation to 55%. If you are a disabled veteran, this bill could financially help your spouse.
    - **Action: June 24, 2025, it was in the House:** Subcommittee Hearings Held
- **HR 2278, Survivor Benefits Delivery Improvement Act March 21, 2025**
  - The Survivor Benefits Delivery Improvement Act was reintroduced and would increase the monthly rate for dependency and indemnity compensation (DIC) 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.
    - **Action:** was in the House and failed to pass Congress before the Congress shut down
- This legislation would improve caregiving support for veterans' families. This includes enhancements to the VA Program of Comprehensive Assistance for Family Caregivers (PCAFC), expansion of home health and long-term care services to meet current and future needs of veterans, their caregivers, and families. Access to employment assistance under the Military OneSource Program of the Department of Defense and Reimbursement of fees associated with certificates or licensure renewal necessary for such employment.
- **HR 2148 Veteran Caregiver Reeducation, Reemployment, and Retirement Act**
  - This legislation acknowledges caregivers' invaluable contributions while addressing the significant economic and emotional burdens they face. By **offering education, employment and retirement opportunities**, the legislation empowers caregivers to **improve financial security** while potentially reducing the federal government's long-term economic burden.
- **S 1027 and HR 2033 Military Spouse Hiring Act**
  - (Identical Bill) – “Military Spouse Hiring Act” is a bill aimed at **incentivizing employers to hire military spouses** by **expanding the Work Opportunity Tax Credit (WOTC) Program**. The legislation would add military spouses as a new target group within the WOTC, aiming to address the high unemployment rate among military spouses. This act is a response to the challenges military spouses face in finding and maintaining employment due to frequent moves and deployments associated with military life.
- **Note: The Work Opportunity Tax Credit Program** was established to support populations who face significant barriers to employment, and adding a military spouse target group is long overdue. Passing the Military Spouse Hiring Act will provide another important level needed to address the critical issue of spouse unemployment.

- The Act would amend the Internal Revenue Code of 1986 to make employers of spouses of military personnel eligible for the work opportunity credit.
- S 1027 read twice and referred to Committee on Finance and Subcommittee on Disability Assistance and Memorial Affairs Legislative Hearing on Pending Legislation – Congress Shut Down

### Caring for Survivors Act of 2023 – H 2055

- **Summary: This bill increases the monthly rate of dependency and indemnity compensation payable to surviving spouses through the Department of Veterans Affairs (VA). It does two (2) things.**
  - Dependency and indemnity compensation is a monthly payment made to eligible survivors (i.e., spouses, parents, or children) of (1) certain veterans who died as a result of a service-connected condition; (2) service members killed while on active military duty or active or inactive duty for training; or (3) veterans who **did not die from a service-connected condition, but were totally disabled by a service-connected disability** for a certain period of time. These bills would **increase Dependency and Indemnity Compensation** paid by the Veteran's Administration to surviving spouses **from 43% of 100% disability compensation to 55% to equal other survivor programs**. If you are a disabled veteran, this bill could help your own spouse
- The bill:
  - Reduces **from 10 years to 5 years of total disability**, in order for a survivor to qualify for benefits
  - Specifies the **amount that is payable to survivors of veterans who were rated totally disabled for a period of less than 10 years before their death**
  - **Failed to pass before Shut Down**

### The Pact Act Surviving Spouse Information

- The Pact Act has added more than 20 presumptive diseases to the initial list
- **Male breast cancer and urethral cancer, additional blood cancers, and new conditions like hypertension and Monoclonal Gammopathy of Undetermined Significance (MGUS)** for Agent Orange exposure. Other additions include more gastrointestinal and head cancers
- **Surviving spouses may now submit claims for DIC** if their spouses had any of the conditions on the expanded list. Go on [www.va.gov](http://www.va.gov) for other presumptive conditions from Agent Orange and other exposures
- **\*\*March 5, 2024 – VA expanded health care years earlier than previous.**
- **Veterans who served in the Vietnam War, the Gulf War, Iraq, Afghanistan, the Global War on Terror, or any other combat zone after 9/11** and were exposed to toxic substances **will be eligible to enroll in VA health care starting March 5.**
- Veterans who **never deployed but were exposed** to toxins or hazards while training or on active duty in the U.S. will also be eligible to enroll
- **Veterans** eligible for VA health care under these authorities **do not have to apply** for VA benefits before enrolling

## HOW WE ORGANIZE

- **Website Updated – 08/15/25** – LukeMOAA.org Programs: Surviving Spouses
- We can assist with seeking answers
  - Caregivers
    - Dealing with PTSD issues in caring for your loved one
    - Respite Care and Tips
    - Our Thinking Changes as We Age
  - Planning for the Loss of Your Loved One
    - Understanding what documents are important, what passwords are used, what are the ordinary household maintenance bills, what are bills that are unique
    - What are yours and your spouse's wishes for care
    - What are yours and your spouse's wishes for end-of-life matters
    - Wills and Trusts
  - Casualty Assistance Programs for the 8 uniformed services
    - Casualty Assistance documents
    - Tragedy Assistance Program for Survivors (TAPS)
    - IRS Tax Preparation Assistance for new surviving spouses
    - Gold Star information
  - Planning for Your Own Death as a widow/er
  - Military Officers Association of America (MOAA) References

## Resources

- Chapter Website
- National MOAA
  - SS Virtual Meetings
  - Publications
    - Help Your Survivors Now, a Guide to Planning Ahead
    - Estate Planning Guide
    - Turning the Corner: Surviving the Loss of a Loved One
- Casualty Assistance Programs Information (one website) for all: **Army, Air Force, Space Force, Navy, Marine, Coast Guard, NOAA, USPHS**
- Be Connected
- TAPS
- 

## Questions?

- Linda Wolverton, SS
  - [Linda.wolverton@lukemoaa.org](mailto:Linda.wolverton@lukemoaa.org)
-

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

- If you think all MOAA councils and chapters are equal, they are not. I've been to others and found this to be true. You should all be very proud of your chapters.
- Arizona chapters are what MOAA envisioned for chapters to be.
- Arizona has a great reputation with MOAA staff.

## **Chapter Metrics/Chapter Affairs Liaison – Col Pete Kloeber**

### **AZ Chapters – Membership**

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

### **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 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 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 other attendees.

## **Committee Module Reminders**

- **NRT and DNC: Not available 2 October – Approximately 1 December 2025**
  - Implement New Privacy Policy – notified 1 October 2025
- New members can only be shown **one time** on CM (Member or Leader position)
  - Now have option for **Multiple leader positions**
- Only show “MOAA 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 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**
  - Two (2) per Chapter by Position (default President and Membership ... or as requested)
  - If deactivated ... contact [chaptets@moaa.org](mailto:chaptets@moaa.org)
- Notify MSC of deceased members, moves, contact info changes
- Review CM – Update for changes in leader positions

## Info/Reminders

- Find C&C on website – moaa.org
  - “About MOAA” / “Councils and Chapters”
- Pay Chapter Dues Online – New system/vendor: “Cheddar UP”
  - 88 Chapters enrolled, 15 applications in process
- Send newsletters to MOAA ([blaird@moaa.org](mailto:blaird@moaa.org)) and also to [chapters@moaa.org](mailto:chapters@moaa.org)
- MOAA Web Presence for Chapters
  - <https://www.moaa.org/content/chapters-and-councils/council-and-chapter-enewsletters/council-and-chapter-communications/chapter-web-template/>
  - Need Chapter Alias and Chapter ID
- Opt-in TMN – just enter email
  - [https://moaa.highroadsolution.com/moaa\\_preference\\_page/EmailSearch.aspx](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/>
  - POC: **Rachel Sanks**, [rachelsa@moaa.org](mailto:rachelsa@moaa.org), 1-800-234-6622, ext. 120
- MOAA Chapter Recruiting Program Guide (downloads)
  - <https://www.moaa.org/content/chapters-and-councils/chapters-and-councils/council-and-chapter-recruiting-and-membership/>
- Near Real Time (NRT) Recruitment List – use it ... it helps!
- 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 January – 31 May
  - Contact: [dave.shidler@getamba.com](mailto:dave.shidler@getamba.com) (515-365-6632)
  - Info: <https://www.moaainsurance.com/lp/council-and-chapter.html?>
- MOAA Vacations Ad Campaign – \$100
  - Ad in at least 1 newsletter and banner ad on website (proof required)
  - Contact: [jon@MOAAvac.com](mailto:jon@MOAAvac.com) or [mike@MOAAvac.com](mailto:mike@MOAAvac.com) (800-211-5107)

## 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*
  - <http://www.moaa.org/Content/Publications-and-Media/MOAA-Publications/Council-and-Chapters-Policy-and-Procedure-Guide-Details.aspx>
  - *“Chapters should have liability insurance”*
    - MOAA General Counsel
    - AZ = 8 of 9

### **Value of Councils**

- **Lead and coordinate efforts in state legislative advocacy**
- Support National MOAA legislative objectives
- Identify/negotiate chapter geographical boundaries
- Help form new chapters or satellites
- **Help established chapters become stronger/more effective**
  - Jim Clenney: Catalina Mountains Chapter, Coronado Chapter, Green Valley Chapter, Tucson Chapter, Yuma Chapter
  - Pete Kloeber: Arizona Chapter, Grand Canyon Chapter, Luke Chapter, Northern Arizona Chapter
- 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/Total Force Conference – Col Pete Kloeber

### MOAA's Top Challenges

- MOAA Long-Term Financial Stability
  - Assets
 

▪ MOAA	\$170.3M
▪ MOAA Scholarship Fund	\$178.1M
▪ The MOAA Foundation	\$ .6M
- MOAA Foundation Stability.
  - Need donations or endowment to help cover program costs
  - MOAA currently provides Grant to balance budget (~\$300K)
    - Project to end Grant = 2030
  - Endowment Goal \$1M
    - \$1M Bequest in process
- Sustaining and Increasing MOAA Membership
  - Overall membership increasing (basic): 346,863
  - Paid membership declining: 181,720
    - Down 38% last 12 years
  - Age
    - 60% > 60
    - 26% > 80
  - Gift Memberships
    - Start with Academy and ROTC Graduations – graduates and families
    - Eventual functionality at moaa.org
- Chapter System Viability
  - Chapter members are our most involved advocates
  - Chapter membership is declining: 32,058
    - Down 9% from 2024
    - Projected EOY 2027: 25,730

- Goal: 1% growth per year above attrition
  - 2025 accession goal: 2,580 (cover est. attrition of 2,256 + 1% growth)
- 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

## GOVERNANCE

### 501 (c) (19) Veterans' Organization

- **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 ...
  - "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 present members of the Armed Forces, or the spouses, widows, or widowers of such members or cadets

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

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

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

- Chart is included with minutes and included with presentations emailed to council officers and staff, chapter presidents, past council presidents and 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 – “Advocacy”**

## ADVOCACY

### 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

### **Tier 1 Priorities**

- VA Health Care
  - **Caregiving Support Improvements** (continue focus in 2<sup>nd</sup> session) – **AiA**
- DoD Health Care
  - **Improve MHS Access to Care** (continue focus in 2<sup>nd</sup> session; pursue standalone legislation) – **AiA**
- Family/Survivors
  - **Military Spouse Hiring Act** (continue focus in 2<sup>nd</sup> session) – **AiA**
- Retirees/Veterans
  - Ending the Wait Report Priorities (Tier 2 as long-term issue; ID new Tier 1)
- Currently Serving
  - Unaccompanied Housing Improvements (Progress in NDAA; Tier 2 to monitor implementation; ID new Tier 1)

### **HOW Can We Help?**

### **MOAA Legislative Action Center**

- Charts (showing number of chapter members registered and number of actions taken) are included with minutes and included with presentations emailed to council officers and staff, chapter presidents, past council presidents and other attendees.

## MOAA Legislative Action Center

- Quarterly Engagement Report
- Council and Chapter Legislative Leaders Webpage
  - <https://www.moaa.org/legisleaders>
- **Reminder:** Do NOT have to be a MOAA member

## MOAA's Simple Message

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

## MOAA Charities

- The MOAA Foundation (TMF)
  - \$230K Crisis Relief Program (40+ events)
  - \$129K Community Outreach Grants
- MOAA Scholarship Fund (MSF)
  - \$18M Loans and Grants 2025-2026 Academic Year
  - 1,800 Students of Military Families

## People's Conference

- Total Force+ - Advancing Solutions for the Military & Veteran Community

## Total Force+

- Preserving the “All-Volunteer Force”
- Themes **People Outrank Everything**
  - 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 **SUCCESS**
    - 2,700+ Registrants
    - 1,400+ Attendees
  - Year 2: 1 – 3 February 2027 **APPROVED**
  - Year 3: 31 January – 1 February 2028
  - Year 4: 29 January – 1 February 2029 (soft hold)
  - Year 5: 4 – 8 February 2030 (soft hold)

## 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 – 4<sup>th</sup> Thursday, 7 pm (Eastern)
  - November 20\* – Advocacy in Action (AiA)
  - December 18\* – 2025 in Review/2026 Outlook
    - *\*Adjusted to avoid conflict*
- November 5<sup>th</sup>, 6 pm (Eastern) – Virtual Surviving Spouse Liaison Training
  - POC: Jen Goodale at [jenniferg@moaa.org](mailto:jenniferg@moaa.org)
- **December 1 – January 31**: Submission dates for LOE, Harris Communications, Strobridge and Surviving Spouse Liaison Excellence Awards
- **December 1 – February 28**: Submission dates for the MOAA Foundation Community Outreach Grants

### 2026

- Monthly: MOAA Roundtables – 4<sup>th</sup> Thursday, 7 pm (Eastern)
- April 17<sup>th</sup>: Advocacy in Action (AiA)
- April 18<sup>th</sup>: Council Presidents Seminar
- **May 28 – 30**: Western Leader Training Workshop – San Diego

## MOAA Council & Chapter Affairs

**800-234-6622**

- CAPT Frank Michael, USA (Ret)
  - Senior Director, ext. 108; [frankm@moaa.org](mailto:frankm@moaa.org)
- Dena Kilgore
  - Program Director, ext. 818; [denak@moaa.org](mailto:denak@moaa.org)
- Victoria Twyne
  - Program Manager, ext. 118; [victoriat@moaa.org](mailto:victoriat@moaa.org)
- Will Partain
  - Chapter Affairs Specialist, ext. 168; [williamp@moaa.org](mailto:williamp@moaa.org)
- Rachel Sanks
  - Chapter Affairs Specialist, ext. 120; [rachelsa@moaa.org](mailto:rachelsa@moaa.org)

## MOAA ... and You Make a Difference!

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### Old Business

**Action Item #2** – Col Pete Kloeber will contact MOAA with the recommendation that all new MOAA members become members of an Arizona Chapter. **Completed.** Col Kloeber talked with MOAA Councils and Chapters. The plan for now is to continue with the NRT process and hopefully improve that process with implementation of the new privacy policy.

**Action Item #3** – Tabled until May 2026 meeting.

**Action Item #4** – **Completed** prior to June 1, 2025.

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### New Business

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

- **Completed** – Presentations were emailed prior to distribution of minutes.

**Action Item #2** – CAPT Chuck Vaughan asked that the Southern Chapters and the Northern Chapters get information on costs and locations for the November 2026 AZCOC meeting.

**Action Item #3** – CAPT Jim Carman will get a bullet points list of MOAA's accomplishments to Col Kloeber.

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### Adjourn

- A motion to adjourn was made by CAPT Bruce Kosaveach and seconded by Col Tom Waddell. Motion passed. Meeting adjourned at 1438. **(Vote #3)**

Respectfully submitted.

Pam Wojtas  
AZCOC Secretary  
Phone Number: 623-544-4477  
Email: [jp7wojtas@gmail.com](mailto:jp7wojtas@gmail.com)

**NEXT AZCOC Meeting will be on 8 May 2026 – location – Grandview Terrace Ballroom, Sun City West, AZ**