



# **Council & Chapter Affairs**

**PACOC State Convention  
September 12-13, 2014**





# **Chapters & National: Working Together**

- Collaboration is essential
- Peer-to-peer interaction is the best and most effective method for recruitment and retention



# Membership Model

- Membership level determines what products/services a member receives
- Moving away from providing products and services to everyone regardless of what member paid



# Common Foundation

**BASIC**

No Fee

**PREMIUM**

**LIFE**

# Choose the Level That Meets Your Needs



Spouse Benefits  
Mirror Member's  
Category



# **New Membership Model: What Will We Gain?**

- Increase in percentage of younger officers
- Larger pool of members that can later be converted to Premium membership
- Differentiation in value propositions

# Council & Chapters Operational “Snap Shot”

- Today: 412 chapters - 57,000± members
  - 4 new chapters/1 new satellite
  - Recruited 1,570 new chapter members (monetary incentive qualified)
  - 229 rosters submitted
  - 139 council and chapter LOE winners
- Increased legislative chair/liaisons – up 42%
- Gold Bars; 4,321 requests supported to date
- USAA sponsorship supported 80 council and chapter events

# Chapter Recruiting 2014

- Maintained focus on recruiting new chapter members
- Primary effort aimed at 300K+ non-chapter MOAA members
- Roster submissions, reporting new and retaining current chapter members are the key components
- Refined and new recruiting tools



# Refined 2014 Tools

- Slight refinements to incentives/tools
- Retained \$10 per new chapter member (must be national MOAA member)
- Quarterly Awards program
  - Record # (10 councils/3 chapters)
- Online chapter member dues renewal
  - 50+ chapters participating/\$4,000+ disbursed
  - Sharing best practices - listened to treasurers
- Opt-in email addresses
  - Shared 23,000 email addresses to date
  - Pushed out via updated recruiting lists

# New 2014 Tools

- Implemented chapter electronic support messages to publicize events/recruit members
  - Send electronic support messages (2x per year) to non-chapter MOAA members who live within ZIP code area
  - Delivery: easy to use standardized fill-in the blank electronic request form located on the website
  - Phased approach: test/learn with SE region states

# New 2014 Tools (con't)

- Series of online training webinars and videos to train/educate chapter leaders
- Conduct “live” and “record” (post on web)
  - ✓ Jan – on-line chapter membership dues
  - ✓ Mar – communications video
  - ✓ May – event planning
  - ✓ Jun – LC/LL training for
  - ✓ Aug – personal affairs
    - Oct – public relations
    - Nov – tax exemption status

# Electronic Funds Transfer

- Not new or refined, but misunderstood:
- Chapters benefit by receiving monetary incentive funds quicker/greater accuracy
- Started electronic pay-outs in 2011
- Late 2013: only 152 chapters participated
- Campaign to increase participation rates
  - Promoted in communications
  - LOE criteria (5 points)
  - New 2015 incentive: EFT account required to be eligible for roster incentive pay-out
- Halfway there: 188 chapters now enrolled

# Aspirational Goal

- Achieve chapter influence in every congressional district (435)
  - Links chapter mission to national MOAA priorities
  - Personalizes chapter/legislator relationship
  - Provides single focal point
- Two ways to satisfy the goal:
  - Primary - grow chapter/satellites in uncovered districts
  - Secondary - provide a designated legislative chair/liaison from existing chapter/satellite
- Key – council/chapter coordination for coverage

# Chapter Recruiting 2015

## Why modify CRP 2015

- Course corrections based upon council/chapter leader feedback, budget analysis/feasibility and utilization of program tools
- Laser focus on recruit/retain chapter members

## What is it?

- Chapter Recruiting 2015 still built around rosters/annual recruiting lists/quarterly updates – best tool now to recruit chapter members
- Monetary incentives/program goals focused even more tightly on chapter recruiting and retention



# 2015 Refinements

- Slight refinements to incentives and tools
  - Retain \$10 per new chapter member (Note: must be national MOAA member)
  - New roster submission incentive (must have EFT):
    - \$50 (early bird special Jan 1-15)
    - \$25 (Jan 16-31)
  - Annual recruiting awards: \$500 per category
  - Updated LOE criteria (2014 look back)
  - \$750 flat rate chapter development reimbursement
  - USAA sponsorship funding refinements:
    - \$800 per council
    - \$300 per chapter
  - P&P Guide revision to capture program changes

# National MOAA Membership

- Life blood to maintain influence on Capitol Hill
- MOAA membership incentives for paid membership
  - Must be new PREM/LIFE member to qualify
  - \$250 per chapter for participation (min of 10 to qualify)
  - \$500 bonus for 100+
- Voucher program
  - Must be new paid member and new chapter member to receive and qualify
  - PREM good for one year of chapter dues (\$15)
  - LIFE good for two years of chapter dues (\$30)
- Cadet and Gold Bar program
  - Over 4,500 requests/only 1,146 completed BASIC forms
  - \$250 per chapter for participation (min of 10 to qualify)
  - \$500 bonus for 100+



# Communications Platforms

- Military Officer Magazine (monthly/hard copy/electronic)
  - C&C column focused on national (non chapter) members
  - Educate, awareness and inspire them to join a chapter
- The Affiliate (monthly/electronic)
  - Targets chapter leaders
  - Share best practices on effective chapter management
- Council & Chapter Update (monthly/electronic)
  - All chapter members
  - General MOAA and chapter interest items
- Legislative Updates (weekly/electronic)
  - MOAA members signed up to receive messages
  - Very latest advocacy information and action alerts

# 2014-15 Campaign Milestones

- ✓ Jul - LOE Board; mid-year EFT payout, quarterly awds
- Sep - Chapter Leaders' Symposium; 2<sup>nd</sup> e-mail opt-in
- Oct - Quarterly Awds; Annual Meeting/LOE Dinner
- Nov - C&C update to publicize new roster submission incentives
- Dec - Close-out CRP 2014 + Annual/quarterly awds
- Jan - 2015 recruitment packages; roster submission
- Feb - Roster processing; pay-outs; Comm awds
- Mar - Officer updates; recruiting lists
- Apr - Kick-off recruiting; Council Presidents' Seminar
- May - Mini-leaders workshop (NE region)
- Jun - LOE submissions due; 1<sup>st</sup> e-mail opt-in



**Questions?**