



STRATEGIC PLAN

2022 TO 2026

REVISED JANUARY 1, 2024

EXECUTIVE SUMMARY

The Military Officers Association of America (MOAA) 2022 to 2026 Strategic Plan is a vibrant, living document. It establishes and articulates the MOAA Board of Directors' strategic vision, mission, values, goals, and six specific strategies to accomplish MOAA's mission and ensure long-term improvement of the association. The document is frequently referenced, annually reviewed, and periodically refreshed to maintain its currency and relevance.

The plan also provides a blueprint of MOAA's business model and the environment in which MOAA works to set the stage for the staff to prepare an operational roadmap in all MOAA departments for support, alignment, and collaboration for the goals set forth.

MOAA's vision, mission, and values are:

Vision: Be recognized and respected as the foremost organization advocating on behalf of the uniformed services community and its family members.

Mission: To preserve and protect earned benefits for our uniformed services, veterans, their families, and surviving spouses through advocacy, leadership, education, and service.

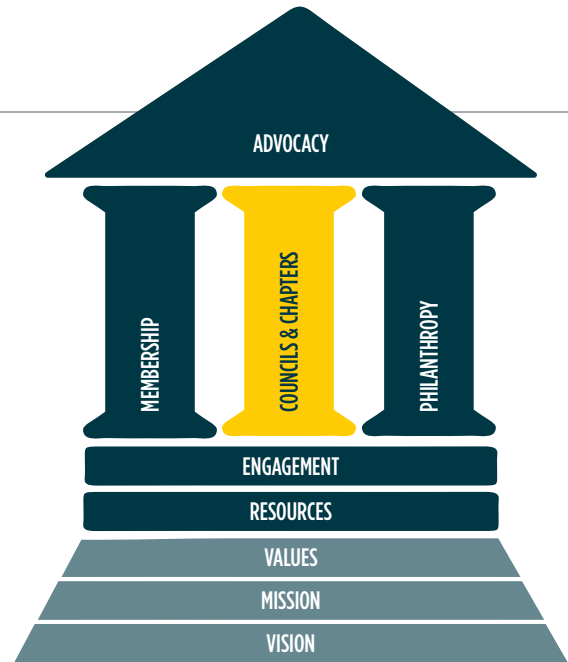
Values: Expressed by our commitment to "Never Stop Serving" and articulated through four tenets: service, leadership, diversity and inclusion, and professionalism.

MOAA's six strategic priorities are Advocacy, Membership, Councils and Chapters, Philanthropy, Engagement, and Resources.

The relationships between the plan's six strategic priorities are illustrated in the form of a neoclassical building. The foundation sits on the bedrock of MOAA's vision, mission, and values, setting the standards and supports for the integrated areas of focus.

Two of the strategic priorities, resources and engagement, are floors that span the length of the entire building. Financial, human capital, technology, and infrastructure resources enable and energize activities, while positive, targeted engagement across the strategic priorities position MOAA for mission success.

Three of the strategic priorities are shown as vertical, structural



columns. Each represents the functional priorities of Membership, Councils and Chapters, and Philanthropy. They are load-bearing columns sufficiently resourced and reinforced to create positive engagements. Together, they support the roof, the strategic priority of Advocacy on behalf of the men and women of the uniformed services, veterans, their families, and the surviving spouses.

The board of directors uses the plan as a guiding and living document in assessing the health of the association and performance of the senior staff. Accountability for attaining MOAA's six strategic priorities rests with the senior headquarters staff and with the relevant committees of the board of directors.

MOAA's success will be measured by the association's commitment to embrace the plan, develop the supporting staff-level operational plans, and track both strategic and operational metrics to ensure all the priorities, goals, and strategies are producing mission success. Strategic metrics, to the extent possible, will focus on lead indicators to measure our progress toward achieving our strategic plan objectives building on our past performance.

This overarching view combines with a disciplined, long-term approach to protect pay and benefits supporting all ranks and uniformed services who serve, will serve, or have served, as well as family members and survivors. Also important are efforts to provide value to members for their continued support and their selfless work to Never Stop Serving — our motto — in their communities.

MISSION AND VALUES



MOAA is a nonprofit, nonpartisan association of officers from America’s military services and the Commissioned Corps of the U.S. Public Health Service and National Oceanographic and Atmospheric Administration, comprising the nation’s uniformed services. We are active duty, retired, former, and National Guard and Reserve officers, and surviving spouses, supporting all ranks and branches who serve or have served, as well as our family members. MOAA advocates with Congress, DoD, VA, Department of Homeland Security (DHS), and other departments to preserve and protect commitments made on behalf of a grateful nation to those who have served and those who continue to serve our country, fulfilling MOAA’s promise to “Never Stop Serving.”

Vision: Be recognized and respected as the foremost organization advocating on behalf of the uniformed services community and its family members.

Mission: To preserve and protect earned benefits for our uniformed services, veterans, their families, and surviving spouses through advocacy, leadership, education, and service.

Values: Expressed by our commitment to “Never Stop Serving” and articulated through four tenets: service, leadership, diversity and inclusion, and professionalism.

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- **Service** – Develop and maintain an engaged nationwide community of support for all Americans who now serve, will serve, or have ever served, and their families.
- **Leadership** – Exemplify leadership to our nation and encourage it to honor commitments made to those who serve or have served, their families, and the surviving spouses. Advocate wisely and collaborate with diverse veterans and military service organizations to protect the welfare and future of our men and women in uniform. Support collaborative solutions to preserve a strong national defense.
- **Diversity and inclusion** – Embrace the growing diversity of our uniformed services and our nation as a strength, attract more diversity among our membership, and include diverse perspectives as we accomplish our mission.
- **Professionalism** – Embody the ideals of “officership” – duty, honor, integrity, selfless service, and excellence – to champion our mission of advocacy for our uniformed services, valuing those who have served while connecting our nation with the people who have sworn an oath to defend it.

THE ENVIRONMENT



SERVING ACTIVE DUTY AND BEYOND

It is nearly universally accepted that the creation of the all-volunteer force (AVF) has led to our nation's military advantage for over five decades. The AVF has proven to be resilient through periods of peace and war, but it cannot be assumed to be permanently sustainable without the continued support of the nation—both its leaders and its citizens..

The AVF is not the cheapest military possible, but it has proven to be the best, with adequate resources necessary to ensure its continued success. To recruit and retain the quality force needed to protect our nation, we must recognize that military service is a continuum including those who serve today, those who served in the past, and those who will serve in the future. How we as a nation support those currently serving, as well as how we keep our commitments to those who have served, will directly impact our ability to attract the next generation to the profession of arms.

MOAA, as an association of officers, is about far more than just officers. We see our leadership and support for the AVF as one of our most sacred obligations, especially in terms of ensuring the welfare of all enlisted members and their families.

The nation is struggling to recruit and retain the force we need to defend our country and support our allies when called upon. Reversing these trends requires a whole-of-government approach, and the nation must use all the tools necessary to keep

the AVF ready and capable, today and in the future. We cannot ignore the documented decreased interest and reduced eligibility for military service among our young people. In addition to 77% of young Americans currently being ineligible to serve without a waiver for being overweight, having a history of drug use, or mental or physical health issues, the propensity to serve has also dropped precipitously. Only 9% of 16-to-21-year-olds have expressed a willingness to serve based on recent polling. This is a dire situation.

MOAA is part of the solution. We will strive to highlight the positive side of military service so future generations will continue the 50-plus-year legacy of the success of the AVF. We recognize the success and viability of the AVF is often directly related to family and community influencers recommending service to the next generation. Influencers include those currently serving and those who have served, as well as their spouses, families, and surviving spouses. The treatment and perceptions of this community are integral to our mission at MOAA, as we are often the last line of defense for health care, compensation, and overall quality of life drivers – protecting these benefits remains our core mission.

We embrace our role as the strongest advocate to ensure commitments and promises made, across the full continuum of service, are honored. This includes pay, housing, health care, child care, prevention of food insecurity, and a variety of other

THE ENVIRONMENT



JOINT HOUSE AND SENATE VETERANS AFFAIRS HEARING ON CAPITOL HILL

family support programs and benefits essential to keep the AVF as a national strategic advantage. Our platform to protect earned benefits is directly tied to the current success and the future success of the AVF.

Future members will be drawn from a much smaller and increasingly diverse pool of eligible officers who view membership in military and veterans service organizations differently than their predecessors. With the 21st-century military's intense operational tempo and continuing demographic changes in the active force, these potential members will have a different service experience and will have different expectations than their predecessors.

Motives for engaging in the work of associations like MOAA also differ among generations. Earlier generations of uniformed servicemembers often sought camaraderie with their peers, while more recent members are more likely to seek hands-on, impactful charitable activities. While previous generations of officers served in a society where most families had a sole breadwinner, today's uniformed service families rely on dual incomes, and women lead more households than ever. Compared to earlier generations, officers today face more com-

plex factors when attempting to secure their financial future.

MOAA's future requires us to support our current members, expand our member base, increase outreach to those currently serving, and invest in understanding and diversifying our organization so our membership is reflective of the uniformed services of today and tomorrow. MOAA will encourage our councils and chapters to recognize that local community outreach strengthens MOAA's effectiveness as an organization by supporting those who have served, those who are currently serving, those who will serve, and their families. MOAA will continue to focus on issues such as education, professional development, spousal employment, and transition readiness – areas likely to appeal to the next generation of officers.

The COVID-19 pandemic accelerated the use of virtual tools and the abilities and preference of many Americans to use virtual forms of communication. MOAA must continue to adapt to meet future members' needs in a technologically advanced and socially connected world. The key to future success will be our ability to leverage innovation and technology to make our suite of services scalable and globally accessible for an increasingly mobile audience. Video, digital, and social media

THE ENVIRONMENT



platforms will be increasingly important to this effort.

Moreover, MOAA must demonstrate this ability in a highly competitive marketplace: According to GuideStar.org, there have been as many as 45,000 nonprofit organizations devoted to serving veterans and their families in this decade, and there are many emerging and transitory groups positioning themselves to cater to the needs of the newest generation of servicemembers and their families.

MOAA's focus on its two charitable subsidiaries, the MOAA Scholarship Fund and The MOAA Foundation, positions us to continue to make significant contributions to all members of the uniformed services (officer and enlisted), veterans, military families, and surviving spouses. While the potential for "donor fatigue" exists, the generosity of our current members, and the commitment to social impact and service exhibited by the next generation of members, creates a unique opportunity to further establish MOAA as a leader among Veterans Service Organizations (VSO) and Military Service Organizations (MSO).

The legislative environment offers an increasingly high degree of uncertainty and additional challenges. MOAA is uniquely positioned, being both a VSO with a focus on federal, state, and VA actions and an MSO focused on DoD actions. This allows us to bridge the gaps between these two entities.

The national debt and existing budget challenges will require the DoD to make critical funding decisions and identify the right trade-offs between modernization, readiness, and people programs (end strength, pay, health care, and more) to effectively support the National Defense Strategy. People programs, personnel compensation, and benefits must be emphasized

with members of Congress as a balance against any possibility that DoD might consider trading off personnel costs against current or future military capability.

Further, shortages of medical personnel, both military and civilian, suggest the military health system must proceed carefully with direct care system reforms. Both military treatment facility restructuring and proposed medical billet cuts demand rigorous analysis of medical manpower requirements and civilian care availability to avoid unfavorable operational consequences and impaired access to beneficiary care.

In a polarized political environment, MOAA's advocacy for a military constituency valued by members of both parties is a positive attribute. MOAA must continue to ensure its advocacy and messages are bipartisan or nonpartisan. This may be challenging when an issue of concern to our constituents, or one affecting military preparedness, is associated with partisan stakeholders.

MOAA will always strongly advocate for our current and future uniformed servicemembers, veterans, their families, and survivors. Issues like health care, disability compensation, toxic exposure, military pay and benefits, recruiting challenges, and many others will be prominent among our advocacy agenda. Given the financial backdrop, we will need to sharpen our focus, and we may need to recognize incremental progress on key issues. We are in it for the long haul, and as our victory on eliminating the Survivor Benefit Plan-Dependency and Indemnity Compensation offset for surviving spouses showed, we'll stay on task for decades, if necessary, until we achieve the results our servicemembers, veterans, families, and survivors deserve.

CURRENT ACTIVITIES AND BUSINESS MODEL



MOAA's business model is based on membership, with significant funds also derived from investment income, royalties, and advertising. As a membership-based organization that relies on annual dues, it is critical to demonstrate value to our members and positive impact in the communities we serve. This is achieved with a comprehensive advocacy action plan, relevant news and information, discounted products and services, community engagement opportunities through MOAA councils and chapters, philanthropic initiatives, and a robust suite of programs and services, all designed to support servicemembers, veterans, military families, and survivors at every stage of their life and career.

Dues from Premium and Life members finance about 30% of the cost of supporting our advocacy efforts and other operations. Additionally, our Basic membership program connects us to a new generation of members and provides us the opportunity to convert them to dues-paying status once we have proven our value and acquired their trust. While Basic members do not bring in dues revenue, they participate in our advocacy efforts, bring value to our affinity partners and advertisers, and in some cases, deliver royalty revenue to MOAA.

DIGITAL PUBLICATIONS



Dues revenue also contributes to other critical MOAA programs, along with investment income (about 30% of MOAA's revenues) and non-dues income (about 40%, from royalty agreements and advertising). MOAA's royalty and advertising revenues depend on maintaining a membership base large enough to attract corporate marketing. The size of MOAA's membership also contributes to our influence on Capitol Hill as we work to advance our advocacy agenda.

MOAA expects royalties and advertising strategies to evolve within a competitive insurance marketplace and a digital future for information and advertising. To address the changing marketplace, we will evaluate new products, enhance current products to make them more competitive, and increase digital advertising opportunities.

The MOAA Foundation and the MOAA Scholarship Fund offer additional support to the uniformed services community and further enhance the MOAA brand. The Scholarship Fund is a 501(c)(3) program providing educational assistance benefits to children of all military families (officer and enlisted) in the form of interest-free loans and grants. The MOAA Foundation, also a 501(c)(3), offers professional development, education and transition support, and emergency relief to more than 100,000 currently serving members and veterans of all ranks, their families, and their survivors each year.

Providing member value is the association's focus, with an objective to strengthen membership.

CURRENT ACTIVITIES AND BUSINESS MODEL

We seek to achieve this objective in these ways:

- MOAA co-leads a coalition of 35 VSOs and MSOs in The Military Coalition (www.themilitarycoalition.org). Our leadership role in the coalition and our record of legislative successes on Capitol Hill are unmatched. We have been at the forefront of efforts to secure lifetime health care with TRICARE For Life and the groundbreaking passage of the Post-9/11 GI Bill. We led the repeal of “COLA minus 1%” legislation and consistently protected housing allowances from significant reductions. In 2019, we achieved repeal of the decades-long Survivor Benefit Plan-Dependency and Indemnity Compensation offset, resulting in an average of nearly \$12,000 of additional compensation annually for 66,000 surviving spouses, the vast majority of whom are former enlisted spouses. MOAA was instrumental in the passage of the Blue Water Navy Vietnam Veterans Act of 2019, supporting claims for those who served at sea and were exposed to Agent Orange. Further, MOAA’s continued engagement with Congress on behalf of these veterans resulted in the addition of six conditions to the Agent Orange presumptive-conditions list: bladder cancer, hypothyroidism, Parkinsonism, asthma, rhinitis, and sinusitis. Following that success, MOAA partnered with several veterans advocacy groups to pass the Sergeant First Class Heath Robinson Honoring Our Promise to Address Comprehensive Toxics (PACT) Act of 2022, adding nearly two dozen conditions with presumed connection to toxic exposure and positively impacting tens of thousands of veterans.
- Our 10 registered lobbyists engage Congress across the spectrum of pay and benefits, health care, recruiting, and other issues impacting the quality of life for those in and out of uniform and their families. They also engage the White House, DoD, Department of Homeland Security, the VA, and other governmental and nongovernmental stakeholders as needed. As fiscal challenges persist in Congress, MOAA will



PRINT PUBLICATIONS

continue to be vigilant to ensure costs of essential programs are not funded on the backs of our servicemembers, our veterans, or their families. Our nation’s promise to those who serve, and those who have completed a career of service, is to protect the value of their compensation, access to health care, and other service-earned benefits.

- A network of nearly 400 affiliates — councils and chapters — offers members the opportunity to connect with other military officers, future AVF candidates, family members, and surviving spouses to generate grassroots support for our legislative agenda, support membership growth at the local and national levels, and provide MOAA “ambassadors” who promote patriotism, service, and engage with young people who have the potential to serve in communities and schools across the country. They are part of the nonprofit fabric in their community, providing support and assistance for local causes while building the MOAA brand.
- *Military Officer* magazine and our digital media platforms, email newsletters, and video and social media channels inform and engage members and prospects.
- We offer best-in-class insurance and a range of financial and other products at advantageous rates.
- Our Transition Center professionals prepare servicemembers and their spouses for civilian employment and subsequent advancement, advise them on career-development strategies, and provide financial education and benefits assistance.
- We maintain a library of easy-to-understand resources that offer insight on financial matters and benefit programs pertinent to the uniformed services, veterans, and surviving spouses.
- Our Member Service Center engages with current and prospective members regarding member services, legislative advocacy, access to earned benefits, and other issues of concern.
- Building on the success of The MOAA Foundation’s COVID-19 Relief Fund, MOAA has created a Crisis Relief Program to assist uniformed services personnel, veterans, and their families during natural disasters, catastrophic events, and other emergency situations.

GOALS AND STRATEGIES

MOAA's strategic plan sets priorities for the organization within six major areas: Advocacy, Membership, Councils and Chapters, Philanthropy, Engagement, and Resources. It also identifies specific goals and strategies for staff and board members to operationalize over the period of the plan. Accountability for attaining MOAA's goals rests with the senior headquarters staff and with the relevant committees of the board of directors.



MOAA NETWORKING FORUM & HIRING EVENT



ADVOCACY IN ACTION



ADVOCACY UPDATE



CRISIS RELIEF DINNER

STRATEGIC PRIORITIES: ADVOCACY



The **ADVOCACY** strategic priority is to encourage the federal government to enact and maintain policies, compensation, and benefits that sustain an AVF of the size and quality needed to maintain a strong national defense, that fulfills commitments to those who have served, and that supports currently serving personnel and their families.

Our focus will consider the political and fiscal climate, as well as the legislative priorities of Congress.

OUR SPECIFIC GOALS:

- Ensure regular military compensation and service-earned benefits for active duty, Guard, and Reserve members are not eroded by cost-saving measures that shift financial burdens to servicemembers and their families.
- Ensure military pay increases are consistent with the private sector (Employment Cost Index) and sustain COLA raises for retirees.
- Ensure changes to the military health system sustain beneficiary access to high quality care and prevent negative impacts on military medical readiness.
- Protect the value of the earned TRICARE benefit by opposing disproportional fee increases and ensuring coverage policy is regularly updated.
- Protect the TRICARE pharmacy benefit and advance program improvements that address beneficiary complaints and remove barriers to prescription medication compliance.
- Ensure timely access to service-earned VA benefits and oppose efforts to use veterans' disability compensation, health care, or other benefits to pay for VA improvements.
- Strengthen DoD-VA collaboration.

- Strengthen services that support wounded warriors, an expanding population of servicewomen and women veterans, and the caregivers who provide essential support.
- Improve survivor benefits.
- Protect the commissary benefit.
- Guard against cuts to uniformed service quality-of-life programs and advocate for oversight of public/private initiatives.
- Increase incentives for businesses to hire veterans and spouses, such as the Work Opportunity Tax Credit for employers.
- Support military service recruiting by protecting military and health care benefits from erosion.

OUR STRATEGIES:

- Maintain our collaborative leadership role in The Military Coalition and on its committees regarding compensation, entitlements, and health care issues for servicemembers, retirees, veterans, their families, and surviving spouses.
- Conduct strategic congressional engagements, including Advocacy in Action (AiA) programs, aimed at fostering relationships with key legislators on committees and caucuses aligned with MOAA priorities. Develop and maintain strategic relationships between MOAA leadership and key legislators, and leading members of the executive branch, including the secretaries and staffs of the Departments of Defense, Veterans Affairs, Homeland Security, Health and Human Services, and Commerce.
- Maintain and enhance MOAA's reputation of integrity and nonpartisanship via objective analysis and assessment of legislation impacting uniformed servicemembers and veterans.
- Increase member and nonmember participation in state and federal advocacy activities.
- Develop an advocacy narrative for internal and external consumption, with emphasis on valuation in terms of financial impact to uniformed servicemembers, retirees, veterans, their families, and surviving spouses.

STRATEGIC PRIORITIES: MEMBERSHIP



The **MEMBERSHIP** strategic priority is to grow membership, thereby increasing MOAA's powerful voice in advocacy where it matters most. We will employ strategies that contribute to long-term growth of our overall membership with an intense focus on increasing paid membership levels (Premium and Life categories) and identifying opportunities to increase dues revenue. To achieve success, we will strive to deliver relevant value to our members in ways that enhance their engagement and identification with MOAA.

OUR SPECIFIC GOALS

- Maintain Premium renewal rates at or above 78.5% each year and keep pace with industry benchmarks for professional membership organizations.
- Increase pool of Basic members while converting at least 2.5% of these members to paid status each year.
- Increase brand awareness within the universe of prospective members and their families as indicated by familiarity levels in periodic benchmark studies.
- Embrace and advance inclusion in MOAA's membership as we strive to ensure our organization reflects today's uniformed services. As the demographics of the eligible officer population changes, so must MOAA's demographics change.
- Increase commitment and participation levels to ensure all MOAA members and their families appreciate and under-

stand the value of membership and to further strengthen our association.

OUR STRATEGIES

- Enhance and refine the member experience to ensure messaging and engagement opportunities align with a current or prospective member's unique needs and awareness levels of the organization.
- Expand outreach initiatives to enhance engagement of current and prospective members and allow them to better experience the benefits MOAA provides.
- Identify opportunities to better understand the unique needs of the diverse segments within MOAA's membership to create a welcoming and supportive environment in which all MOAA members can thrive.
- Monitor the effects of the approved dues strategy and adjust, if needed, to ensure membership dues continue to contribute to MOAA's overall financial health.
- Align efforts related to membership, councils and chapters, member services, and charities with the aim of increasing engagement, relevance, and membership.
- Review membership eligibility requirements and related considerations, including potential changes to the association's name and tagline.

STRATEGIC PRIORITIES: COUNCILS & CHAPTERS



The **COUNCILS AND CHAPTERS** strategic priority is to grow and strengthen a powerful nationwide network of active and engaged affiliates to influence legislation, serve their local communities in impactful ways, grow membership at the local and national levels, and increase MOAA brand awareness nationwide. We recognize that affiliates — councils, chapters, and satellites, both geographic and virtual — are volunteer-led independent entities with limited resources. The execution of the below goals and strategies will require a tailored approach to stimulate success in affiliates with varying sizes, recruiting environments, and organizational characteristics.

OUR SPECIFIC GOALS:

- Increase overall chapter membership, encouraging younger members to join to mitigate attrition and leadership succession challenges inherent in an aging volunteer membership.
- Strengthen and grow virtual chapters that provide unique and valuable engagement with military personnel, veterans, and family members that desire to share specific military experience and support.
- Expand headquarters support to all affiliates in the areas of non-dues revenue generation, advocacy engagement tools, recruiting and retention, leadership succession, communications, administrative and technology assistance, and leadership development.
- Share information across the affiliate network on best-in-class practices, emphasizing advocacy, membership growth, and community service, thereby increasing MOAA brand awareness among prospective members and their families.
- Strengthen affiliate legislative advocacy to maintain legislative influence in every state.

OUR STRATEGIES:

- Increase the percentage of national members participating in the affiliate system, in part by improving prospect and member data provided to affiliates. Likewise, increase the percentage of affiliate members becoming national members by communicating the value of national membership.
- Stimulate growth in the virtual chapter network by identifying prospective virtual chapter leaders and providing them with appropriate resources to conceptualize and establish additional chapters.
- Explore and pursue alternate affiliate structures and means of recruiting as necessary to adapt to variations in recruiting environments and other characteristics of geographic areas or affinity groups.
- Maintain a vibrant, welcoming, diverse, and accessible affiliate system through programs that incentivize recruitment and retention of younger members and other underrepresented populations.
- Increase the role and influence of councils within the independent affiliate system in training, recruiting, and communications. Incentivize council involvement in chapter development and, likewise, incentivize active chapter participation in councils.
- Continue to strengthen the effectiveness of communications with and within the affiliate network by various means, to include: a) conducting periodic leadership workshops around the country with specialized training tracks for key volunteer leaders; and b) offering and encouraging acceptance of a MOAA national visit with every council annually, and with every chapter at a minimum of every three years, with the aspirational goal being every two years.
- Explore new technological solutions to provide affiliates with improved tools and resources facilitating legislative engagement, recruiting and retention, and networking.
- Encourage chapters to utilize grants from MOAA National to add value to, and engage with, their communities.
- Encourage surviving spouses to maintain their membership and to benefit from the camaraderie of service.

STRATEGIC PRIORITIES: PHILANTHROPY

The **PHILANTHROPY** strategic priority is to improve the well-being of servicemembers and veterans, their families, and surviving spouses. MOAA's two 501(c)(3) charities — The MOAA Foundation and the MOAA Scholarship Fund — support MOAA's community, both officer and enlisted, especially in times of need. The following goals and strategies ensure the charities' ongoing programs and services, as well as their long-term sustainability.

OUR SPECIFIC GOALS:

- Ensure the programs supported by our charities meet the current needs of the communities we serve to the greatest extent possible, and that our charities are equipped to meet emerging needs or fill in gaps in services when possible.
- Expand outreach efforts among our membership and the communities we serve to increase overall awareness of our charities, as well as the importance of the services and support provided through our programs.
- Increase both participation and annual donor contributions to The MOAA Foundation to enable expanded support of MOAA programs.
- Leverage the decades-long level of donor support and investment portfolio performance of the MOAA Scholarship Fund to provide more grants and scholarships to deserving individuals.
- Increase planned and corporate gifts to both charities.
- Secure sufficient annual funding to reduce or eliminate The MOAA Foundation's reliance on MOAA's operating budget.
- Modernize current practices and leverage new technologies to improve performance in fundraising, donor communication, and management of all key programs.

OUR STRATEGIES:

- Regularly evaluate the needs of the communities we serve, reducing gaps in available resources and growing opportunities to offer/expand support in areas aligned within mission scope and scale.
- Improve online presence and donation experience to increase both the number of first-time and recurring donors, and the average gift size.



'My daughter and I are so grateful to find a good-hearted organization that helped us to pay our bills. ... Please continue to help other people who are struggling financially. We really appreciate you.'

Cynthia Farmer, whose husband, a veteran, passed away in 2017. She is one of many grant recipients made possible through The MOAA Foundation's relief efforts.

- Identify and adopt an improved student loan/grant management software solution.
- Enhance and increase stewardship and outreach efforts:
 - Revitalize and implement a more robust planned giving program to include a comprehensive tracking process.
 - Increase communications with current donors about outcomes and how their donations make a major impact on those we serve.
- Build and strengthen relationships with leaders and influencers in the communities we serve.
- Explore opportunities to promote programs through similar nonprofits/VSOs/MSOs, installation staff/leaders, and resource providers.
- Understand, explore, and develop how The MOAA Foundation can utilize grant-writing expertise to apply for and assess grant opportunities in support of MOAA's philanthropic mission.

STRATEGIC PRIORITIES: ENGAGEMENT

The **ENGAGEMENT** strategic priority is to instill and integrate targeted, positive communications as a cross-cutting foundation directly supporting MOAA's priorities and missions. Engagement underscores how positive connections and value-added communications across MOAA's mission areas are vital and powerful tools to advance MOAA goals and objectives and celebrate successes. Primary activities include leveraging our many communication channels, including *Military Officer* magazine; providing best-in-class career transition assistance, financial and benefits education, and member support programs; encouraging chapter affiliation; and delivering a robust suite of member products and services to enhance the MOAA value proposition.

OUR SPECIFIC GOALS:

- Strengthen MOAA's content across all association communication channels to drive successful outcomes for the association's Advocacy, Membership, Councils and Chapters, and Philanthropy goals and initiatives.
- Provide world-class career transition and financial benefits and education services to engage and support current members while attracting new members and encouraging those in both groups to affiliate with a chapter.
- Maintain a responsive and knowledgeable Member Service Center to provide enhanced member support and to serve as an information resource for both current and prospective members.
- Offer a robust suite of exclusive products, services, and events to enhance the MOAA value proposition and convey relevance for all membership audiences at their stage of career and life.

OUR STRATEGIES:

Overall:

- Collectively leverage MOAA's board of directors, the MOAA staff, the network of MOAA council and chapter affiliates, and an informed membership-at-large to advance the association's goals and objectives.
- Be a trusted source for information ensuring that MOAA remains a recognized expert in advocating for and contributing to the health and welfare of members of uniformed services past and present, as well as their families and survivors.



- Maximize positive engagement opportunities to maintain, diversify, and expand MOAA's membership by informing current members of the outstanding value MOAA delivers and by communicating this same value proposition to officers who have not yet become members, helping them understand MOAA's role in protecting their future benefits and the benefits of all who serve, as well as the veteran and surviving spouse communities.

Communications:

- Keep *Military Officer* magazine modern and diverse to broaden the publication's appeal and to increase revenue.
- Implement capabilities and user experiences on MOAA.org that encourage site visitors to stay longer and visit more pages during their sessions. This includes implementing business rules to aid in membership and revenue generation.
- Maintain best-in-class standards for The MOAA Newsletter, continually growing the number of recipients and maintaining an open rate above industry standard. Use metrics and product developments to remain current.
- Deploy calls to action, multimedia, and social media to attract younger prospects and to engage members on key topics in advocacy, member benefits, chapter activities, and educational events.

STRATEGIC PRIORITIES: ENGAGEMENT



- Ensure a broad range of calls to action are embedded in communications on all platforms, covering membership outreach, benefit promotion and expansion, and chapter opportunities.
- Create content in print and digital formats to support awareness of MOAA's charities, including the stories of those who have benefitted from member generosity, the variety of programs offered, and the many ways to donate.

Career Transition, Career Development, Financial Benefits, and Education:

- Offer exclusive programs and services, to include career development, as well as education about benefits available following military service to enhance member value and encourage membership at all levels, with an emphasis on paid membership levels.
- Present career development and financial and benefits education content including relevant topics from the association's advocacy agenda, along with value-added member services and special events.
- Enhance MOAA brand awareness and increase family engagement to attract and retain members.
- Maintain a robust events calendar of education services and programs supporting career transition as well as financial

and benefits education, all backed by a multichannel promotion campaign, with the goal to increase participation in these events.

Member Services:

- Measure and track Member Service Center interactions, ensuring member experiences remain positive and satisfactory, including responses to email inquiries within 24 business hours.
- Advance means of interaction through mobile and website platforms.

Products, Services, and Events:

- Research, evaluate, and implement best-in-class products and programs that offer innovative, tiered benefits with relevant and personalized value for a diverse audience of current and prospective members and their families.
- Leverage access to benefits to differentiate the value and encourage upgrading for each of MOAA's three membership categories. This includes civilian career development and financial and benefits education support.
- Work with affinity partners to streamline online experiences and enhance data collection efforts for greater analytic insights about member behaviors when engaging with our partners.

STRATEGIC PRIORITIES: RESOURCES



The **RESOURCES** strategic priority goal, through good governance and strategic planning, is to secure the required financial, human capital, technology, and infrastructure elements as a cross-cutting foundation directly supporting MOAA's priorities and missions. Resources fuel the association and drive successful outcomes across the enterprise. When responsibly achieved, they position MOAA to thrive in the near and long term.

OUR SPECIFIC GOALS:

- Our overall governance and strategic planning goal is to ensure good governance of the board of directors across its fiduciary and legal responsibilities, ensure program oversight, and provide the board an informed, engaged, effective, and forward-looking focus on MOAA's mission accomplishment.
- Our overall financial goal is to enable the success of MOAA's many vital programs, and to serve as prudent and effective stewards of MOAA's financial resources. MOAA relies on disciplined and professional financial management to meet its core funding needs, to provide the resilience needed to withstand adverse economic conditions, and to maintain strategic flexibility.
- Our human capital goal is to recruit and retain people with the skill sets MOAA requires for its rapidly changing environment.
- Our technology goal is to both leverage and optimize MOAA's investment in technology by increasing work efficiency and effectiveness across the organization while protecting our critical systems and sensitive data.
- Our infrastructure goal is to efficiently utilize MOAA's head-

quarters building to enhance collaboration, optimize space utilization, and maintain excellent physical working conditions.

OUR STRATEGIES:

Governance and Strategic Planning:

- Develop and implement sound governance policies and procedures for the board of directors, ensuring all voices are heard and have an equal opportunity to influence board policies and strategic planning goals.
- Ensure board members are capable, diverse, enthusiastic, fully oriented, participating financially, and informed; ensure they are selected based on merit and are fully engaged in advancing MOAA's programs and initiatives through effective and efficient corporate governance and planning processes.
- Continuously assess MOAA's business practices and activities to mitigate risk of loss to MOAA's resources and reputation.
- Monitor the board's effectiveness through regular self-assessments — testing the board's knowledge of MOAA's programs and priorities, its revenue constraints, and its external operating environment.
- Monitor the degree to which board members have the knowledge and experience to guide MOAA as it prepares for future challenges. Identify any areas requiring additional education and training, particularly those involving financial management and membership development.
- Maintain a five-year Strategic Plan, and its associated forward-looking metrics, as a living document that is regularly

STRATEGIC PRIORITIES: RESOURCES

reviewed, referenced, and refreshed by the board and MOAA staff.

Financial:

- Continue to grow our investment portfolio to meet long-term financial needs faced by MOAA, the MOAA Scholarship Fund, and The MOAA Foundation.
- Continue to focus on reducing our dependence on investment income to balance our operating budget.
- Coordinate with the Investment Committee to ensure oversight of our investment portfolio and our advisers is provided on a periodic basis.
- Explore creating new strategic alliances that offer win-win opportunities with other organizations and enable us to increase revenue, reduce expenses, or do both through collaboration and partnership.
- Work with all business units to identify non-dues revenue opportunities including digital advertising income, events, royalties, and e-commerce.
- Evaluate and control future expenditures in a strategic manner to meet operational needs and remain within board-approved budgeted portfolio investment return targets.
- Upgrade our financial management systems and accounting procedures, including our internal controls, to streamline and manage our resources more efficiently.

Human Capital:

- Continue to review and enhance our policies and procedures — especially our employee recognition, compensation, and performance appraisals — to enhance effectiveness and efficiency in the workforce.
- Significantly increase the extent and effectiveness of collaborative engagement among the staff.
- Continue developing staff training and professional development plans and programs.
- Recognize and integrate diversity and inclusion into MOAA's human resources processes.



- Build a culture where employees are encouraged to seek and exploit opportunities for innovation, including incremental gains, breakthroughs, and potential game-changing ideas.

Technology:

- Ensure MOAA's association management software and other third-party solutions provide the most cost-effective and adaptable means of capturing and maintaining data and managing our relationships and communications with members.
- Review and apply new technology across all MOAA's workflows and business processes with the goal of measurable improvements in efficiency and cost reduction.
- Leverage technology to deliver and enhance member value and allow members and potential members to consume and interact with MOAA's content in a secure, efficient, and engaging manner.
- Maintain cybersecurity protocols across the MOAA information technology enterprise.

Infrastructure:

- Optimize the use of MOAA's capital assets, facility, and equipment through comprehensive planning and a commitment to preventative and routine maintenance to extend service life and maximize value.
- Evaluate future opportunities to utilize the infrastructure to develop possible non-dues revenue resources.

CONCLUSION

MOAA has gained universal recognition for its advocacy successes. We remain committed to that goal. As organizations across our nation face challenges in membership growth and revenue, MOAA has a unique opportunity to utilize our strategic goals to enhance growth and increase revenue while providing the foundation that appeals to our newest generation of servicemembers and veterans. We firmly believe this plan complements our overarching goal: Never Stop Serving.





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