

# Monthly Leadership Roundtable: Visit Program Overview

August 29, 2024



# Agenda

- Welcome
- Program Updates
- Upcoming Training Opportunities
- Council and Chapter Visit Program
  - Colonel Ted Janosko, USA (Ret), Affiliated Councils and Chapters Cmte, MOAA BoD
- Discussion
- Closing

# Program Updates

- Committee Module and NRT
  - Making progress
- Survey: 214 Responses, Remains Open
- October MOM: Council and Chapters
- MOAA 2024 Elections
  - August 1-31, 2024 Members cast votes by going to <https://www.moaa.org/> and following the voting instructions provided.
- Resource Manual Mailing to All Presidents
  - Council Survey to advise on intentions
  - Bring personal copy to workshops

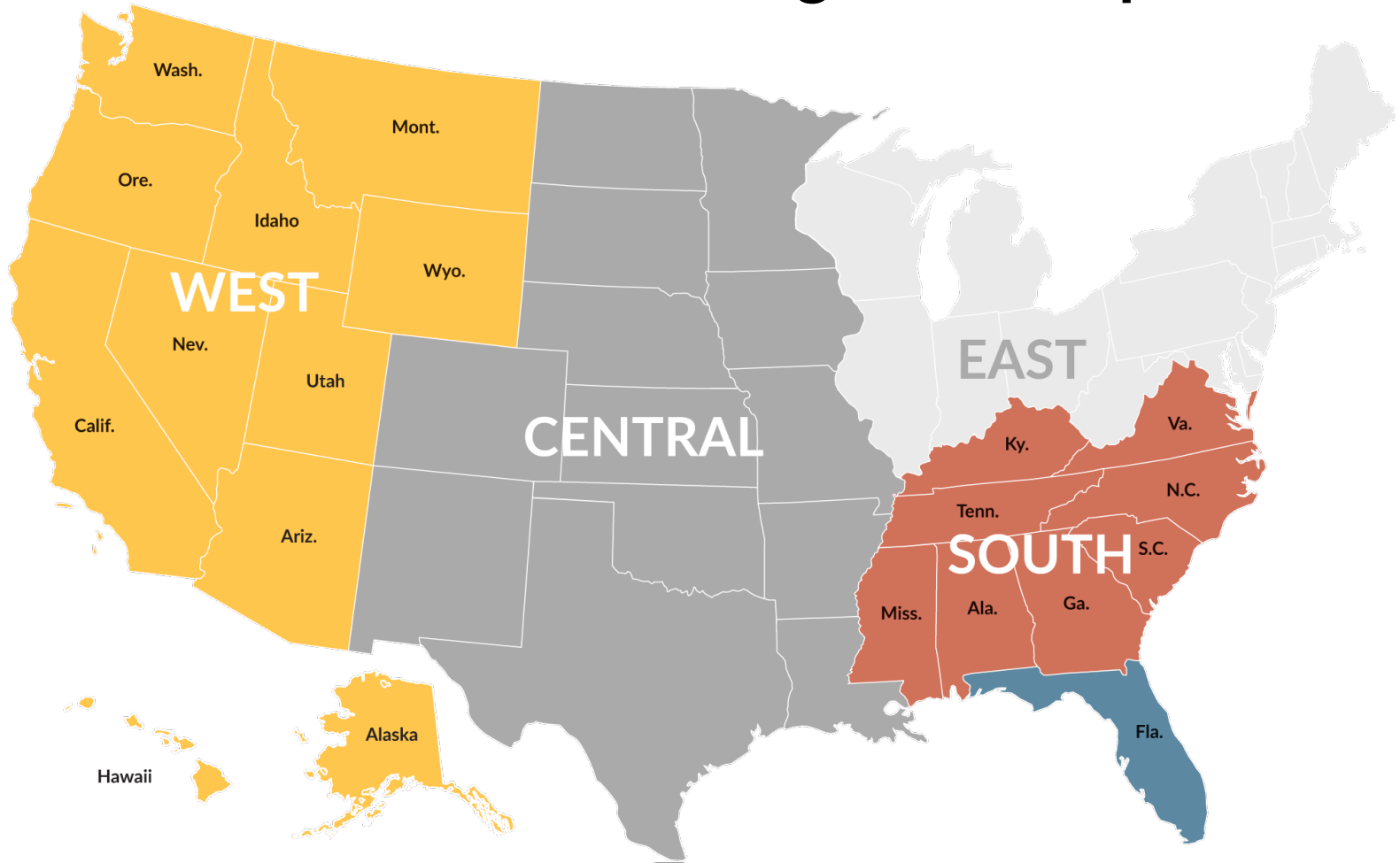
# Program Updates

- Summer Advocacy in Action Program
  - Focus on targeted pay raise for junior enlisted, restoring BAH to 100 percent, and continued advocacy for Richard Star Act
- Public Affairs and Communication Professionals Virtual Chapter
  - Contact Contact CDR Linc Smith, USN (Ret) at [mvng288@aol.com](mailto:mvng288@aol.com)
- Chapter Pay Portal Replacement Ongoing

# Program Updates

- 2023 Harris Communications and LOE Feedback Provided to Leaders
  - 2024 Annual Awards Criteria Coming Soon
  - Survey Monkey Apply
- Beneficial Ownership Information (BOI) Reporting Requirement
  - Associated with The Financial Crimes Enforcement Network, U.S. Department of the Treasury.
  - Current guidance **exempts all tax-exempt entities that fall under 501(c)** of the Internal Revenue Code.

# 2024 Leader Training Workshops



**Leadership Seminar**  
Orlando, FL  
January 25-27  
FL, Other C&C by invitation

**Virtual Workshop**  
New Leaders  
March 27  
Focused on New Chapter Leaders

**South Workshop**  
Greenville, SC  
May 17-18  
AL, GA, KY, MS, NC, SC, TN, VA

**Virtual Workshop**  
Experienced Leaders  
August 14  
Focused on Experienced Leaders

**West Workshop - Reno, NV**  
November 15-16  
AK, AZ, CA, HI, ID, MT, NV, OR, UT, WA, WY



# 2024 Roundtable Schedule

January 18* Compliance and Legal Topics	February 29 Committee Module	March 28 Advocacy in Action	April 25 Marketing
May 30 Individual Awards Program	June 27 Generational Recruiting	July 25 Chapter Health Update	August 29 Council/Chapter Visit Program
September 26 New Chapter Dues Portal	Oct 17 Community Outreach	November 21* MOAA Annual Awards	December 19* 2024 review 2025 preview

\* Adjusted from 4<sup>th</sup> Thursday to Avoid Conflict



# Travel Program



# Eligibility

- Councils are Eligible Annually and Chapters Every 2-3 years
- Limited Space in 2024. Plan now for 2025!
- Periodic Eligibility Emails Sent
- To Check Eligibility: [chapters@moaa.org](mailto:chapters@moaa.org).
- POC: Fahria Hossain, [FahriaH@moaa.org](mailto:FahriaH@moaa.org),  
1-800-234-6622, ext. 120

# COUNCIL AND CHAPTER LEADER RESOURCES

## Council and Chapter Awards

Learn about the many honors available to MOAA councils and chapters, and their members.

[READ MORE](#)

## Council and Chapter Recruiting and Membership

Resources for chapter leaders to grow and maintain their membership rolls.

[READ MORE](#)

## Council and Chapter Administration

Forms, links, downloads, and other materials.

[READ MORE](#)

## Council and Chapter Communications

Resources for chapter leaders to grow and maintain their membership rolls.

[READ MORE](#)

## Council and Chapter Community Involvement

Resources for chapter leaders to reach out to their communities.

[READ MORE](#)

## Council and Chapter Training Materials and Opportunities

Leaders and members alike have many learning tools at their disposal.

[READ MORE](#)

1. Council or Chapter Name / Alias (Locate your [council](#) or [chapter](#) alias): \*

MOAA01

2. What kind of event will this be? \*

Chapter Meeting ▾

3. Will this meeting be virtual or in-person? \*

In-person ▾

Please provide your chapter's mission: \*

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

In addition to the general MOAA overview, please select any topics that you would like us to potentially discuss.

- MOAA Overview
- Legislative Priorities
- Levels of Excellence (LOE)
- Other

Is there anything else we should know about the this meeting and the nature of the visit?

Not at this time

Next >>

**4. Date of event - Please list at least 3 different dates in your preferred order:**

**NOTE: Face-to-face meetings must be requested at least 30 days in advance and must adhere to COVID-19 safety guidelines if applicable (i.e., social distancing and face masks, etc.).**

Same location for each date? \*

 Yes No

Date 1 \*



Date 2 \*



Date 3 \*

**5. Location of Event / Address - If you are unsure, please list a general location in your state:**

Location:

(if unknown, please include city, state) \*

Closest/Recommended Airport (if applicable): \*

**6. Time of Event, start time for Social/Meet & Greet Hour or leadership meeting (if applicable) - If you are unsure of the time, please list a general time of day, or "TBD":**

Start Time \*

 ▼

End Time \*

 ▼

Type of Meeting: \*

 ▼

67% Complete

7. Your Name: \*

Fahria Hossain

Service \*

Civilian Chapter Leader

Title \*

Ms.

8. Your preferred email address: \*

fahriah@moaa.org



9. Your chapter/council president's email address (\*a confirmation of this submission will be sent to the listed email address): \*

chapters@moaa.org

10. Please note that once your visit is approved, we will facilitate an email blast. Please acknowledge this by selecting, I agree. \*

I agree

<< Previous

Submit



# Submission Notification

Thank you for your submission.

An automated confirmation of submission will be sent to the email address(es) provided in your application. You should receive additional correspondence from MOAA National regarding this visit request within a few weeks. If you have any questions or concerns, please email [chapters@moaa.org](mailto:chapters@moaa.org) or call (800) 234-6622, and include your reference number with the inquiry.

Reference #: 21647262



# What Happens Next

- CCA Staff Reviews Request, Confirms Speaker, and Notifies the Requestor
  - Confirmation email will include name and bio of the speaker
  - Link for additional meeting details
  - Electronic Support Message form/link
  - Speaker will make contact

# Best Practices

- CEO/Chairman requests come with scheduling risks
- National support with “Email Blasts”
- Leadership meetings in conjunction with event are a must
- Keep us apprised of schedule changes
- PPT presentations to fit the venue/event
- Plan award presentations



# After the Event

- “Trip Report” filed
- Follow-up with questions and due-outs
- Match resources to challenges
- Consider this as a first step in the process
- Critique the visit
- Follow up with status of new chapter members

# Current Program Activity

- 103 Visits for 2024

Affiliate Group	Completed Visits	Remaining Visits
Councils	12 (3 BOD, 8 Staff, CEO/Chairman)	7 (5 Staff, 2 CEO/Chairman)
Chapters	45 (7 BOD, 30 Staff, 8 CEO/Chairman)	39 (9 BOD, 24 Staff, 6 CEO/Chairman)

BOD: Members of MOAA Board of Directors  
Staff: Staff from Council & Chapters, Government Relations, Communications Department  
MOAA CEO/Chairman



# Open Discussion



**MOAA<sup>®</sup>**

Military Officers Association of America

# Visit Request Form

- <https://www.moaa.org/content/chapters-and-councils/council-and-chapter-management/initial-chapter-visit-request/>

# Additional Notes

- In conjunction with your visit, please consider submitting an awards request
  - <https://www.moaa.org/content/chapters-and-councils/moaa-awards/moaa-national-awards-application/>
  - Covered during our May 2024 roundtable: <https://www.moaa.org/content/chapters-and-councils/chapter-and-council-webinars/may-2024-council-and-chapter-virtual-roundtable/>