

Monthly Leadership Roundtable: Chapter Health and Effectiveness

July 25, 2024



Agenda

- Welcome
- Program Updates
- Upcoming Training Opportunities
- Chapter Health v. Effectiveness
- Tracking Chapter Health
- Goals
- Discussion
- Closing

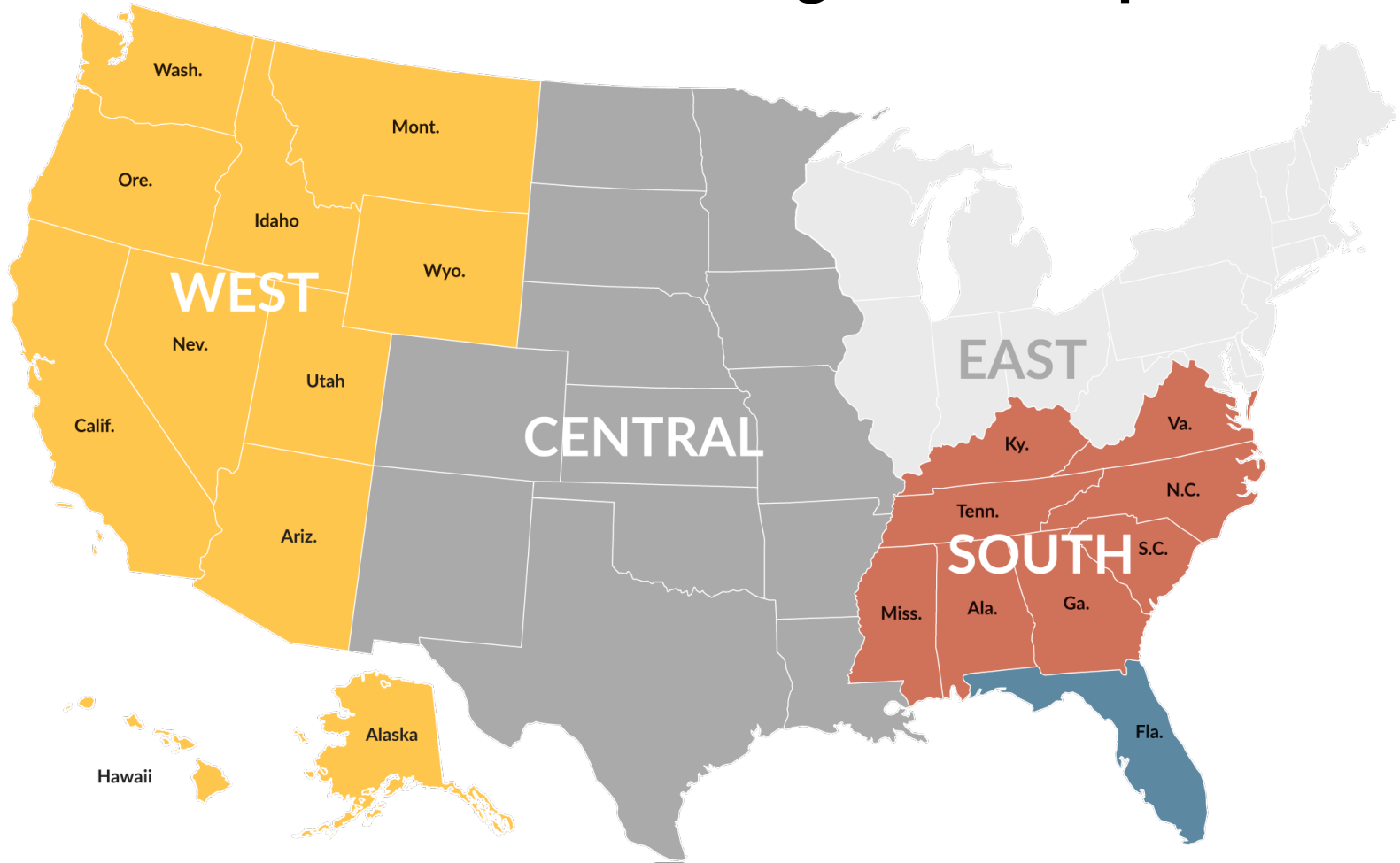
Program Updates

- Committee Module and NRT
 - Beta testing last week, weeks away from access
NRT is not accessible
- Basic Members Upgrades
 - Currently 6,400 chapter basic members
 - Encouraging elevation to paid membership
- Survey: 148 Responses
- MOAA 2024 Elections
 - August 1-31, 2024 Members cast votes by going to <https://www.moaa.org/> and following the voting instructions provided.

Program Updates

- Copyright Infringement Continues
- Summer Advocacy August
 - August 5–September 6, more to follow
 - Focus on targeted pay raise for junior enlisted, restoring BAH to 100 percent, and continued advocacy for Richard Star Act
- Public Affairs and Communications Professionals Virtual Chapter
 - Contact Contact CDR Linc Smith, USN (Ret) at mvng288@aol.com
- Chapter Pay Portal Replacement

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 Committee Module Training	Oct 24* Community Outreach	November 21* MOAA Annual Awards	December 19* 2024 review 2025 preview

* Adjusted from 4th Thursday to Avoid Conflict

Chapter Health v. Effectiveness

Initial Survey Results

“Our chapter health is best categorized as...”

- Healthy
- Stable
- At-Risk
- Other

47

66

21

14



*As of July 25, with 148 responses.

Health V. Effectiveness

A healthy chapter is an organization that is able to sustain itself over time.

An effective chapter is one that positively impacts MOAA's mission.

MOAA's Mission

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



Chapter Health v. Effectiveness

Why does this matter?

- Identifying those at risk across a vast affiliate network
- Understanding our local impact
- Identifying challenges, sharing successes
- Developing resources and strategies
- Keeping our Mission as our North Star

Assessing Health and Effectiveness

- Need to identify the right objective data
- Understand gaps between where we think you are and the reality of how each affiliate is operating
- Take a more holistic approach to include survey data, leadership meetings, etc
- Recognize differing levels of resources
- Not trying to recreate awards criteria
- Address basic health to improve effectiveness and impact

CCA Areas of Focus

- Leadership
- Membership
- Community Outreach
- Advocacy

Leadership



Leadership

Health

- Keeps key officer positions filled
- Officers opted-in to MOAA newsletter
- Submits for MOAA LOE and Communications awards
- Nominates for Strobridge, SS, and individual awards
- Ensures messaging is non-partisan
- Has a bank account and EFT set up

Effectiveness

- Has a leadership succession plan
- Understands and shares MOAA priorities
- Implements best practices and communicates well
- Recognizes and celebrates members' efforts
- Welcomes diverse perspectives
- Funds meaningful projects with MOAA stipends, grants

Leadership

Health

- Develops budget and regularly reviews finances
- Develops meeting agendas and plans ahead
- Participates in MOAA training opportunities
- Requests visits from MOAA national
- Participates in council activities (if there is one)

Effectiveness

- Prioritizes resources with annual budget and strategy
- Stays focused on MOAA's mission
- Shares ideas and helps mentor new leaders
- Engages with MOAA staff and leaders as a team
- Collaborates with other chapters

Membership



Membership

Health

- Promotes camaraderie and maintains a steady membership
- Uses the Committee Module to update rosters
- Accesses the Near Real Time (NRT) Report to see prospects
- Participates in MOAA membership incentive program

Effectiveness

- Implements strategies to recruit new members and grows membership
- Identifies and tracks membership trends
- Develops specific recruitment activities to draw in new members
- Promotes the value of paid MOAA membership

Membership

Health

- Honors MOAA new paid member vouchers for free chapter membership
- Has a website and a newsletter for sharing information
- Has active social media account(s)
- Encourages members to opt-into TMN
- Hosts regular meetings

Effectiveness

- Invites MOAA members in catchment area to events (CCA supported)
- Shares current and relevant details on issues and events; earns awards
- Engages with younger members in real-time
- Underscores the value of MOAA membership
- Engages members with speakers

Advocacy



Advocacy

Health

- Designates a legislative chair or liaison
- Ensures that key leaders are signed up for the MOAA Legislative Action Center
- Supports council representation at AiA
- Participates in the State Legislative Exchange Network

Effectiveness

- Discusses legislative priorities as a chapter
- Encourages all members to amplify the voice of MOAA and impact legislation via the LAC
- Humanizes MOAA priorities on Capitol Hill
- Collaborates across chapters on legislative challenges and successes



Community Outreach



Community Outreach

Health

- Organizes meaningful events for members in the community
- Submits for MOAA stipends and grants
- Raises funds or provides scholarships for ROTC, JROTC, etc
- Interacts, partners with other VSOs, MSOs

Effectiveness

- Represents MOAA in the community, promotes the MOAA brand
- Implements strategy to make the most impact
- Promotes an all-volunteer force, awareness of MOAA
- Positions MOAA as part of the broader local military community

Community Outreach

Health

- Supports and helps promote the opportunities available through MOAA Charities
- Promotes MOAA Scholarship Fund for the children of members
- Shares information on Crisis Relief Program for all ranks, all services
- Coordination of programs for surviving spouses, career transitions, etc

Effectiveness

- Connects MOAA Foundation and Scholarship Fund with those in need
- Honors family sacrifices that may make other scholarships challenging
- Underscores that we are an organization of officers, not for officers
- Establishes MOAA as a trusted resource at all life stages

Tracking Chapter Health ...and then what?

Tracking

- Who are our affiliates?
- What type of affiliate are they?
- How many of each type do we have?
- What is their current operating status?
- Where are they in terms of health?
 - What does the objective data say?
 - What can we learn from discussions, trip reports, survey responses, etc?
- How do we create a fuller understanding of chapter health?

New Tracking System

smartsheet

Q co

File Automation Forms Connections Dynamic View

Example of Council and Chapter Health ☆

Grid View Filter Off Arial 10 B I U S % A

	STATE/ALIAS (Blue=No Council)	NAME	OPERATING STATUS	TYPE	HEALTH ASSESS... (need to reassess)	HEALTH SCORE (as of 3/29/24)	MENTOR ASSIGN...	CLOSURE PROGRESS (update with most recent action)	CHAPTER LETTER DATE (indicating intent to close)	OFFICIALLY CLOSED
1	FRUIT STATE									
2	FR00	FRUIT COUNCIL OF CH	Active	Council	Healthy					
3	FR01	Apple Chapter	Active	Geo	Stable	67				
4	FR02	Banana Chapter	Active	Geo	Healthy	98				
5	FR03	Cherry Chapter	Active	Geo	Healthy	82				
6	VEGGIE STATE									
7	VG01	Pepper Chapter	Active	Geo Independ	Healthy	98				
8	PASTA STATE									
9	PS00	PASTA COUNCIL OF CH	Active	Council	Stable					
10	PS01	Spaghetti Chapter	Active	Geo	At-Risk	58	Colonel Sanders			
11	PS02	Lasagna Chapter	Unknown	Geo Is not inv	Stable	79		Unsure/Council suspects closure		
12	PS03	Linguini Chapter	Active	Geo	Healthy	98				
13	PS04	Ravioli Chapter	Inactive	Geo	At-Risk	52	Captain Crunch	Revitalization planned	6/15/24	
14	PS05	Ramen Chapter	Deactivated/CLC	Geo					11/3/2023	1/1/2024
15	PS06	Fettuccini Chapter	Unknown	Geo	Healthy	90				



Broadening Our Assessment

smartsheet

Search...

File Automation Forms Connections Dynamic View

Example of Council and Chapter Health ☆

Grid View Filter Off Arial 10 B I U




	STATE/ALIAS (Blue=No Council)	NAME	OPERATING STATUS	TYPE	HEALTH ASSESS... (need to reassess)	HEALTH SCORE (as of 3/29/24)	MENTOR ASSIGN...	CLOSURE PROGRESS (up with most recent action)
1	FRUIT STATE							
2	FR00	FRUIT COUNCIL OF CH	Active	Council	Healthy			
3	FR01	Apple Chapter	Active	Geo	Stable	67		
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13	PS04	Ravioli Chapter	Inactive	Geo	At-Risk	52	Captain Crunch	Revitalization planned
14	PS05	Ramen Chapter	Deactivated/CLC	Geo				
					COUNT: 7	SUM: 79	AVG: 79	

Attachments

Row Sheet All

Row 11: PS02

Actions ↑↓ Uploaded (newest)

- 
2024 Survey Results for the...
Row 11
07/22/24, 11:29 AM by Dena ...
- 
Example Speaker Trip Repor...
Row 11
07/22/24, 11:27 AM by Dena ...
- 
Inactive Chapter.msg

Attach Files to Row 11



Understanding At-Risk Affiliates

- What are the challenges?
- Is the council involved?
- What resources can we share?
- Can we connect you to a mentor?
- Can we help support revitalization efforts?
- Is closure imminent? If so, what are the next steps?
- How can we ensure members stay connected?

Developing a Gameplan

HEALTH ASSESS... (need to reassess)	HEALTH SCORE (as of 3/29/24)	MENTOR ASSIGN...	CLOSURE PROGRESS (update with most recent action)	CHAPTER LETTER DATE (indicating intent to close)	OFFICIALLY CLOSED
Healthy					
Stable	67		<input type="text" value=""/>		
Healthy	98				
Healthy	82				
Healthy	98				
Stable					
At-Risk	58	Colonel Sanders			
Stable	79		Unsure/Council suspects closure		
Healthy	98				
At-Risk	52	Captain Crunch	Revitalization planned	6/15/24	

- Revitalization requested
- Revitalization planned
- Unsure/Council suspects closure
- Chapter shared intent to close
- Marked inactive in MOAA's system
- Chapter letter received
- Closed in MOAA's system
- Closure letter sent from CCA

Our Goals

- Better understand how to evaluate health v. effectiveness
- Help you with basic health so you can be most effective
- Have a dialogue on how to improve impact
- Develop strategies to assist at-risk chapters
- Focus time during the August virtual leaders' workshop to dive more deeply into this discussion

Open Discussion



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