

**2017**  
**Chapter Recruiting Program**  
**Guide**



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## 2017 Key Dates

- |                  |   |
|------------------|---|
| <b>January</b>   | <ul style="list-style-type: none"><li><input type="checkbox"/> Campaign Announcement</li><li><input type="checkbox"/> Recruitment Packages mailed to council/chapter presidents</li><li><input type="checkbox"/> Chapter Roster Submissions (due NLT Jan 31)</li><li><input type="checkbox"/> Tabulation of final results for 2016 Chapter Recruiting Program</li></ul>   |
| <b>February</b>  | <ul style="list-style-type: none"><li><input type="checkbox"/> Calculate 2016 Retention Incentive</li><li><input type="checkbox"/> 2016 Col Marvin J. Harris Communications Awards (Packages due on Feb 1)</li><li><input type="checkbox"/> 2016 annual awards winners announced and end of year incentive disbursements</li></ul>  |
| <b>March</b>     | <ul style="list-style-type: none"><li><input type="checkbox"/> 2016 Levels of Excellence Awards (Packages due NLT Mar 1)</li><li><input type="checkbox"/> Council/Chapter Officer Updates (due NLT 18 Mar)</li><li><input type="checkbox"/> Recruiting list sent to chapter presidents and membership chairs</li></ul>  |
| <b>April</b>     | <ul style="list-style-type: none"><li><input type="checkbox"/> Competition officially begins on Apr 1</li><li><input type="checkbox"/> Process new chapter members (submit via online reporting tool or Excel spreadsheet)</li><li><input type="checkbox"/> 2016 Col Marvin J Harris Communications Award winners recognized</li><li><input type="checkbox"/> Council Presidents' Seminar/Storming the Hill</li></ul> |
| <b>May</b>       | <ul style="list-style-type: none"><li><input type="checkbox"/> Quarterly Leaders' Workshop (NE region 5-6 May)</li></ul>  |
| <b>July</b>      | <ul style="list-style-type: none"><li><input type="checkbox"/> Announce quarterly council and non-affiliated chapter winners by region</li></ul>  |
| <b>August</b>    | <ul style="list-style-type: none"><li><input type="checkbox"/> Visit Congressional delegation in home district</li></ul>  |
| <b>September</b> | <ul style="list-style-type: none"><li><input type="checkbox"/> Quarterly Leaders' Workshop (Location/Date TBD)</li></ul>  |
| <b>October</b>   | <ul style="list-style-type: none"><li><input type="checkbox"/> Announce quarterly council and non-affiliated chapter winners by region</li><li><input type="checkbox"/> Present 2016 Levels of Excellence Awards at the MOAA Annual Meeting</li></ul>   |
| <b>December</b>  | <ul style="list-style-type: none"><li><input type="checkbox"/> Competition closes on Dec 26<sup>th</sup> (quarterly council and non-affiliated chapters by region and annual award winners by categories announced in 2018)</li></ul>   |

## **Chapter Recruiting Awards and Incentives**

The chapter recruiting competition means more members and monetary incentives for your chapter. You'll earn \$10 for every new incentive-qualified chapter member recruited!

Please recognize some new chapter members might not qualify for a monetary incentive credit during Chapter Recruiting 2017. Each new chapter member is eligible to receive only one monetary incentive, and incentives cannot be combined with other Chapter Recruiting 2017 incentives.

Your chapter will not receive a monetary incentive credit if the new chapter member:

- 1) is not eligible for national MOAA membership or failed to join MOAA;
- 2) is submitted as a new chapter member gain but previously was reported to MOAA as a chapter member within the past three years

### **Council Incentives and Awards**

- \$250 awarded quarterly to the councils in each of our four regions based on new chapter membership (minimum of 40 new incentive-qualified chapter members).

### **Chapter Incentives and Awards**

- \$10 for each new incentive qualified chapter membership.
- \$15 for each new PREMIUM Member and \$30 for each new LIFE Member who joins your chapter. Chapter membership vouchers are included in the membership kits sent to new PREMIUM members, who will receive one-year membership vouchers, and new LIFE members, who will receive two-year membership vouchers. Those new chapter members who submit a voucher should not be required to pay chapter dues for the time period specified in the voucher. NOTE: This offer does not apply to current chapter members.
- \$250 retention incentive awarded to chapters that retain 95 percent or more of their membership, as determined by national MOAA. To be eligible for the retention incentive, your chapter must have met the Jan 31, 2016 cutoff date to submit a roster to national MOAA. The next suspense date to submit a roster is no later than Jan 31, 2017.
- \$500 award for chapters that recruit the newest incentive qualified chapter members— awarded in six categories based on chapter size. In the event of a tie both chapters will receive the \$500 award.
- \$100 awarded quarterly to the top recruiting non-affiliated chapter (no state council) (minimum of ten new incentive qualified chapter members).
- \$50 for rosters submitted before Jan. 15, 2017, and \$25 for rosters submitted between Jan. 16 - 31, 2017. NOTE: To receive this incentive, your chapter must have reported a surviving spouse liaison and legislative chair or liaison serving in a chapter officer position and be enrolled in MOAA's Electronic Funds Transfer (EFT) program.

## Seven Good Reasons to Join a Chapter

You know the value of belonging to MOAA and your chapter. But when you're talking to a potential new chapter member, it's important to remember that many officers may have only limited knowledge of MOAA's chapter system. Now is the time for them to join their local chapter to add their voice to the thousands of other MOAA members making a difference on the legislative front and in their communities.

Here are seven good reasons for any officer—active duty, Guard, Reserve, former, or retired, or their surviving spouse—to join a MOAA chapter today.

1. **Make yourself heard.** MOAA's chapters provide critical grassroots support for MOAA's national legislative agenda. Our benefits are under attack and MOAA is in the fight to preserve them. Chapter members let their legislators know what's on their minds and open doors for MOAA's legislative team in Washington, D.C. In these difficult times, MOAA members need to stick together and our chapters are the best way we know to do that.
2. **Giving back to the community.** Chapter members are MOAA's ambassadors in their communities, supporting countless programs that make a difference in the lives of others. These members continue their "officership" service and are giving back in the truest sense.
3. **Value added to chapter member lives.** MOAA chapters sponsor interesting programs and opportunities to interact with civic, political, military, and business leaders on issues important to members.
4. **Networking with fellow officers.** Chapters include second career members in the work force and retired service members who have contacts in their communities that can be valuable to transitioning officers.
5. **Stay informed.** Chapter newsletters, websites, and meetings provide you the latest information on local, state, and national issues and changes to military benefits.
6. **Influencing state legislation.** Most states have a council of chapters that unites every MOAA chapter in the state. These councils and independent chapters in states without a council often lobby for and pass state-level legislation that affects military members and their families, such as exempting military retired pay from state income tax or increasing funding for state-run VA programs.
7. **Camaraderie with a purpose.** MOAA chapters unite active duty, former, and retired officers from every branch of service, including National Guard and Reserve, as well as surviving spouses. These centers of camaraderie not only give you a chance to connect with other members with similar backgrounds and interest, but to also develop close and lasting friendships.

**Never Stop Serving. ®**

## Chapter Membership Talking Points

- National MOAA board of directors approved the formal affiliation of councils and chapters in 1953
- Over 400 affiliates nationwide( affiliates are defined as councils, chapters, virtual and satellites)
- Councils and chapters are independent, self-governing and self-supporting organizations who voluntarily choose to affiliate with national MOAA for the purpose of cooperation and mutual support in attaining common goals
- Personal and professional responsibility to never stop serving
- Affiliate members are highly encouraged to be national MOAA members
- Grass-roots advocacy: influence local, state and federal legislation
- Community Ambassadors: opportunities to volunteer in local community
- Support JROTC, ROTC and newly commissioned officer programs
- Provides opportunities for local networking for second career service members
- Scholarship funds to support the local community
- Camaraderie with a purpose: maintain connection to the military family by developing close and lasting friendships with other members with similar backgrounds, core values, and interests

## How to Work the Recruiting List

In early April of each year, national MOAA provides a recruiting list to each of its chapters, which can serve as the foundation for the chapter's annual recruiting campaign. Because the 2017 Chapter Recruiting Program focuses on recruiting and retaining chapter members, the recruiting list contains the names of current national MOAA members (active duty, retired and former officers and surviving spouses) who live in the chapter's catchment area, but who do not belong to your chapter. In addition, we periodically ask national MOAA (non-chapter) members to share their email addresses with their local chapter. Each recruiting list will incorporate all the national MOAA (non-chapter) member email addresses that have opted in for this correspondence from those living within a chapter's geographic area for membership.

Two additional times a year (July and October), an update will be sent to each chapter. This list will be much shorter and only contain the names of national MOAA members in good standing who moved into the chapter's catchment area after the recruiting list was sent or whose contact information has changed.

Depending on where you live, the annual recruiting list can contain dozens or even hundreds of names—especially if your chapter resides near a military base. This list is sent out via email to all chapter presidents and membership chairpersons. You'll need a copy of Microsoft Excel or Microsoft Works software to open and use this file. (You can [download a free trial version](#) at Microsoft's website.) You'll want to leave the original list with your annotated corrections untouched for reference. Make a copy to form your own recruiting list by cutting and pasting the material you need into one or more Microsoft Excel spreadsheets.

As you move through your list, please identify any incorrect names, addresses, phone numbers, or other contact information you may find and send your annotated list to MOAA via email ([chapters@moaa.org](mailto:chapters@moaa.org)) or send a hard copy via snail mail to: MOAA, 201 N. Washington St., Alexandria, VA 22314, ATTN: Council and Chapter Affairs Department. We will note your changes so they don't appear on the next recruiting list sent to you. Your feedback is vital to make the recruiting lists more accurate and we appreciate your efforts.

Listed below are tips and best practices gleaned from MOAA's best chapter recruiters to use when working the recruiting list.

When you open this document, you will notice there are three categories of non-chapter MOAA members – BASIC, PREMIUM, and LIFE. Begin by targeting the members who are easiest to recruit. Next, sort the data into manageable segments.

### **Sort the list based on whether you are an urban chapter or a rural/large geographic area chapter.**

- If you belong to a chapter in an urban area, sort the list by ZIP code, paying attention to the last four digits of the ZIP code. Example: A prospect's ZIP code is 65810-2510. The "2510" part lets you know what part of the city the prospect lives in.
- Rural chapters and chapters that cover a large geographic area have better success if they sort the list by town.
- Use your knowledge of the area to determine what prospects are most likely to join. Look at the prospect's ZIP code or see what town they live in. If it will take the prospect more than an hour one way to attend chapter meetings in an urban area or the prospect lives more than 60 miles away from where the chapter meets, he or she

probably is less likely to join. Focus on the prospects whose geographic location makes them more likely to join.

**Make recruiting a team effort. Once you've done the initial sort to the recruiting list, divvy it up among members of the board of directors or members of your recruiting committee.**

- Board members who share the same ZIP code as a prospect should call them.
- Chapters in rural areas or those that cover a large geographic area should divvy up the list by town, assigning board members to contact prospects who live in their same town or the immediate area.
- If no one lives near someone who is a prospect, a same-service member should call that person. Likewise, have a surviving spouse member call a prospect who is a surviving spouse.
- Look for people you know. Have board members look for people they know or have served with in the past. If a board member knows someone on the list, have them contact that person— even if they live in a different ZIP code or town.

**Continue sorting the list to identify your best prospects.**

- Target MOAA LIFE members first. These prospects often are easier to recruit because they are already sold on the benefits of being a MOAA member.
- Look for younger officers. Some chapters target prospects in the 50- to 70-year-old age range. Remember, you're not just looking for new members. You're looking for new members who will participate in the chapter and be willing to hold leadership positions.
- If the prospect is older, provide information about your chapter's ride-sharing program to meetings, if one exists. Some older members find it difficult to participate in a chapter, particularly if they have to drive to a chapter meeting that's held at night.
- Look at where the person resides, as well as their age. If the prospect is older and lives more than 60 miles from where the chapter meets, and your chapter meets at night, odds are you won't be able to recruit that person.

Now that you've identified the best targets, decide how to contact them. Do you have many people to contact? Are you getting help from other members? If you're the only person who is doing recruiting for the chapter, or have very large list to work even after dividing it up among members of the recruiting committee or board of directors, the easiest approach may be to mail out invitations to join.

#### *First-class Mail vs. Nonprofit Standard Mail*

Some chapters use first-class mail when sending out invitations to join the chapter. If you use first-class mail, you will be given several options—called ancillary service endorsements—on what you would like to have happen if the letter is undeliverable as addressed.

Most chapters choose the “Return Service Requested” option. This option costs nothing when letters of invitation are sent via first-class mail. If the prospect's address is bad, the letter is returned to the chapter, along with the prospects' correct address. (Please note that incorrect address information always should be given to MOAA at the end of the recruiting effort.)

Sending out invitations to join the chapter via first-class mail isn't cheap—particularly if your prospect list contains hundreds of names. You may want to consider sending invitations to join the chapter via Nonprofit Standard Mail. The minimum amount needed to qualify for a Nonprofit Standard Mail rate is 200 pieces or 50 lbs. per mailing.

Larger chapters, which already have purchased a Nonprofit Standard Mail permit, usually use this method to mail out invitations to join the chapter. However, if you've never used Nonprofit Standard Mail before, this may not be your best or cheapest option. Why? For starters, you'll need to prove you're a nonprofit veterans' organization and purchase a Nonprofit Standard Mail permit that costs around \$200. Also, be prepared to do some work. Nonprofit Standard Mail costs less because you do some of the post office's work. This means you'll need to learn how to sort and prepare the letters of invitation prior to mailing. If you are mailing a few hundred pieces at a time several times a year, or if you plan to make a large one-time mailing, Nonprofit Standard Mail may be a good deal.

However, Nonprofit Standard Mail is not forwarded or returned unless you print an ancillary service endorsement, such as "Address Service Requested" underneath your chapter's return address on each mail piece. Be aware that forwarding and return services will result in additional fees or postage, and MOAA does not currently reimburse chapters for this expense. Before using Nonprofit Standard Mail to send out invitations, do the math and see which option is more cost-effective. You also can contact your local postmaster to see if they can help you decide if Nonprofit Standard Mail is the right choice. It is also highly recommended that you have the chapter personnel who will be responsible for processing the nonprofit standard mail attend the free training courses offered by most regional post offices. If not properly prepared (and the regulations are quite involved and specific), Nonprofit Standard Mail may be rejected and given back to you for re-work. Note: You should check with your local post office for current fees and pricing.

Some chapters use the personal touch and call each prospect, if a phone number is given. Not only is it cheaper to call prospects, it also may help increase your success rate and give you an opportunity to gain information you can use for future recruiting efforts. Make notes on who is not responding and why. After several contacts, it's obvious that some people just don't want to join a MOAA chapter. However, many prospects are receptive to the idea—but want to be contacted at a later date. Be sure to note that information.

If you call prospects, ask for their e-mail address—just so you can let them know if a terrific speaker is slated to talk at an upcoming meeting or if an interesting event happens in the chapter. Recruiters in the St. Petersburg Area (Fla.) Chapter ask prospects for this information. This provides the chapter with a direct link for contacting potential members in the future. The chapter also generates interest by periodically e-mailing their newsletter—at no cost—to prospects.

Follow up. If you decide to call prospects, but can't reach someone or no phone number is listed, follow up by mailing them an invitation to join the chapter.

Be sure to note bad addresses and phone numbers on your recruiting lists, and e-mail or snail mail that information to MOAA so changes can be entered in the association's database.

Keep a copy of your annotated recruiting list when you're done. Match it against future recruiting lists—just to make sure your corrections were made. Keeping the old list also will help you identify who the best prospects are to contact in the future.

## **How to Sign Up New Chapter and MOAA Members**

The chapter recruiting program is designed to provide monetary incentives to chapters that comply with the intent of the program. As always, we encourage you to aggressively recruit and report new chapter members, but you should be aware some new recruits might not qualify for an incentive. You also should understand each new chapter member is eligible for only one monetary incentive. Incentives cannot be combined with the others offered under Chapter Recruiting 2017.

Your chapter will not receive a monetary-incentive credit if the new chapter member:

1. is not eligible for national MOAA membership or failed to join MOAA;
2. is submitted as a new chapter member gain but previously was reported to MOAA as a chapter member within the past three years

Please note, for an individual to qualify as a new recruit, he or she must know, understand, and consent to becoming a local chapter member. This acknowledgment is most often accomplished by signing a chapter membership application, by completing an online application, or during a conversation with the potential member. In all good faith, individuals who sign up multiple new chapter members without any personal engagement and simply forward completed national MOAA BASIC membership applications or email new prospective members to inform them they are now chapter members do not comply with the spirit and intent of the chapter-recruiting program.

To have a healthy and vital council and chapter system, we need to recruit new chapter members who can become engaged. With your continued support and recruiting efforts we can achieve our goals.

### **How do you report each of the new chapter members you sign up?**

Please note – you can sign up any new chapter member to include newly commissioned officers, cadets and former members of your chapter. However, you must comply with the paragraphs above to receive a monetary incentive.

1. Sign up new members from the pool of BASIC, PREMIUM and LIFE members who are in good standing with national MOAA, but not a member of your chapter. Please remember surviving spouses when working your recruiting lists.
2. Report the new chapter member via the online Chapter Member Gain Form at this link: [https://fs20.formsite.com/moaaweb/2013ChapterRecruiting/secure\\_index.html](https://fs20.formsite.com/moaaweb/2013ChapterRecruiting/secure_index.html). We developed this online option to simplify and automate the process of reporting new members. However, if you prefer to consolidate and send in the information on an excel spreadsheet, that is an acceptable option, particularly when reporting more than 5 new chapter members at a time. Please send the spreadsheet electronically to [chapters@moaa.org](mailto:chapters@moaa.org).

**How do you report new national MOAA members and/or what if the new chapter member you reported above is not a national MOAA member?**

1. We encourage you to sign up new national MOAA members at the same time as you recruit them for the chapter.
2. Sign up new national MOAA members from the pool of currently serving active duty, National Guard and Reserve members, former officers, lapsed MOAA members, non-members, surviving spouses of former national MOAA members, and chapter members who do not belong to national MOAA.
3. Use the membership enrollment form and have the new member fill it out completely.
4. Enroll BASIC (Free) memberships on the enclosed BASIC membership postcard. No additional monetary incentives are provided for BASIC members. As a reminder, a valid email address is required for BASIC membership.

**Mail BASIC (Free) Membership Forms to:**

MOAA, 201 N. Washington St., Alexandria, VA 22314-9975

5. Enroll PREMIUM/LIFE members on the MOAA membership enrollment form. A signed check or credit-card instructions, must accompany their enrollment forms. When mailing in your enrollment forms we encourage you to enclose more than one form in each envelope, but each new paid member enrollment must be accompanied by an individual payment.

**Mail PREMIUM/LIFE (Paid) Enrollment Forms to:**

MOAA, P. O. Box 1488, Merrifield, VA 22116-9820

6. If you decide to mail the enrollment forms to prospective members, be sure you include your chapter's name before sending them out!
7. A printer-friendly version of the MOAA membership enrollment form is available and suitable for downloading and printing from your computer.

[http://www.moaa.org/uploadedFiles/Content/Chapters\\_and\\_Councils/Chapter\\_Recruiting/Bridge\\_to\\_MOAA\\_National/CR2013-MOAA%20Basic%20Premium%20Brochure.pdf](http://www.moaa.org/uploadedFiles/Content/Chapters_and_Councils/Chapter_Recruiting/Bridge_to_MOAA_National/CR2013-MOAA%20Basic%20Premium%20Brochure.pdf)

Another option is to make black and white copies of the enclosed forms at your location. In addition, you can also request additional hard copies of all forms and brochures by contacting the MOAA Member Service Center by emailing [msc@moaa.org](mailto:msc@moaa.org) or calling (800) 234-6622. Please be sure to identify your chapter and the name of the requestor.

## **Sign Up For Electronic Funds Transfer**

The EFT account is used by national MOAA to disperse monetary incentives, earned by the chapter under the chapter recruiting program, directly into the chapter's checking or savings account.

In an effort to speed up the distribution of incentive money earned through the Chapter Recruiting campaign, national MOAA requests maximum participation by council and chapters in the EFT program. Not only will you receive the funds sooner, EFT will also reduce instances of lost, misplaced, and/or uncashed payout checks.

Participating councils and chapters will receive a follow-up report on earned incentives from MOAA's Council and Chapter Affairs Department. In order to accomplish the above, we will need the following information regarding your council/chapter checking or savings account:

- name of banking institution;
- routing number of banking institution;
- account number to which funds are to be transferred; and
- account type (i.e. checking or savings)

Due to security concerns, we prefer you relay the requested information via telephone by calling MOAA at (800) 234-6622 and asking to speak with one of the following Council and Chapter Affairs staff: Victoria Twyne, ext. 120, or Amy Wood, ext. 168. If you choose to mail the requested information, you may send it to Council and Chapter Affairs, MOAA, 201 N. Washington St., Alexandria, VA 22314.

## 2017 Roster Submission and Retention Incentives

As a self-reporting affiliate, update chapter membership rosters before the annual deadline (Jan 31, 2017) remains critical. Rosters are a foundational component of the chapter recruiting program and serve as a key measurement of the health and vitality of the chapter system.

Roster processing is meant to serve as an accurate accounting for chapter membership. The update process will fill in missing information on an individual's member record, but it will not replace existing information with new information. For example, if we have a blank email record for a member and the roster submission lists an email address in the appropriate column, this email address will be added to the record. If we already have another email on file, no update will be made. Therefore, the roster process cannot be treated as an information update. All address, email, rank/service updates must be made through the MOAA Member Service Center at (800) 234-MOAA (6622) or [msc@moaa.org](mailto:msc@moaa.org) or online at [www.moaa.org](http://www.moaa.org).

To encourage annual roster submissions, we will provide a monetary incentive of \$50 for rosters submitted on or before Jan. 15, and \$25 for rosters submitted between Jan. 16 - 31. NOTE: To receive this incentive, your chapter must have reported a legislative chair or liaison, and a surviving spouse liaison serving in a chapter leadership position and be enrolled in MOAA's Electronic Funds Transfer (EFT) program.

Looking forward to the end-of-year \$250 retention incentive, a chapter must retain 95 percent or more of its members, as determined by national MOAA. Adjustments are made for newly recruited members, those who move away from the local area or die, and chapter members who are not national MOAA members in good standing. Please note in order to receive the end of year retention incentive, a chapter must have submitted a membership roster in two consecutive years to establish a baseline for comparison.

## Online Chapter Member Dues Join and Renewal Program

National MOAA is pleased to provide you with this opportunity to collect your chapter membership dues electronically. New enhancements to the Online Chapter Membership Dues Join and Renew tool will allow participating chapters to offer members: multiyear renewals to both regular members and surviving spouses; and the option of including a donation (up to \$100) in addition to their dues. Best of all, national MOAA pays all set-up, transaction, and administrative fees.

- You must comply with all MOAA security and [privacy standards](#).
- Each chapter sets its own annual chapter dues rate. A minimum of \$12 per year is required.
- The annual dues cycle is established by each individual chapter.
- Regardless of the date submitted, the chapter membership expiration date will be the last day in the final month of the annual dues cycle as established by the chapter.
- Renewing members are required to pay a full year of annual dues, regardless of the date they submit the dues payment. Their local chapter membership expiration date will be the last day on the final month your chapter's dues cycle.
- Newly joining members enter the chapter's annual dues cycle based solely upon the month/day in which they submit their chapter membership payment via the online tool. If they submitted their chapter membership payment within the first six months of the chapter's dues cycle, they would be required to submit a payment for the full annual rate. For those new members joining after six months of the chapter's annual dues cycle, the amount due offers a six-month prorated credit toward their annual local chapter dues.
- All new joins and renewal confirmations will be sent directly to the account and email address established by the chapter and the newly joining and renewing chapter members.
- The system will collect the online payments (credit and debit cards only) and distribute to the chapter on or before the fifth day of each month.
- Please ensure you have your chapter bank account information readily available. You will have an opportunity to review your information before final submittal.

We encourage chapter leaders to learn more about the program and enroll today at <http://www.moaa.org/Content/Chapters-and-Councils/Chapter-Recruiting/Recruiting-Materials/Online-Chapter-Membership-Dues-Join-and-Renewal.aspx> or please email [chapters@moaa.org](mailto:chapters@moaa.org).

## Chapter Electronic Support Messages

To assist our councils and chapters in their efforts to promote events and recruit new chapter members, national MOAA will email council/chapter electronic support messages. These messages, on behalf of chapters that request them, will be emailed to non-chapter MOAA members who live within your chapter's ZIP code area and who have opted to receive emails from national MOAA.

We will email up to two messages a year per council/chapter. To ensure standardization for our membership and ease for our chapter leaders, a [fillable template](#) is provided for your convenience. Be prepared to provide the following information:

- Council or chapter name
- Location, physical address, date, and time of the event
- Program or event features (guest speaker, project, etcetera)
- Costs
- RSVP name, email, and phone number contact
- Website address or link to additional information (as desired)
- Council or chapter president signature block information

Due to the large volume of requests, we are unable to accept customized requests at this time. When composing your message, please fill in the blanks with the appropriate relevant content to ensure proper grammar, punctuation, and sentence structure. Unfortunately, we cannot email images, forms, and attachments with recruiting messages. To share these items with email recipients, post them on your chapter's website and provide the link in the body of your message. Be advised MOAA might be required to make edits to meet message-formatting requirements.

National MOAA requires 60 days' advance notice to pull the appropriate email distribution listings, process the message, and email the message to non-chapter members in your ZIP code area with sufficient time to RSVP for the event. We look forward to assisting our councils and chapters in marketing their events and with your recruiting efforts.

Please access the Chapter Electronic Support Message Form to submit your request on the website at <http://www.moaa.org/recruitingmessage/>

If you have questions on this program, email [chapters@moaa.org](mailto:chapters@moaa.org).

## Chapter Voucher Program

The chapter voucher program provides an incentive for national MOAA members to join a chapter at no cost. All new PREMIUM and LIFE national MOAA (non-chapter) members receive chapter vouchers in their new membership kits. PREMIUM members receive vouchers good for one-year chapter memberships, and LIFE members receive two-year vouchers. A new PREMIUM or LIFE member should submit the voucher to the chapter membership chair when he or she joins. National MOAA will reimburse the chapter through an Electronic Funds Transfer (EFT).

For a chapter to receive reimbursement, the PREMIUM or LIFE member **must** be reported as a new chapter member. Membership chairs should report these **new** members via an excel spreadsheet to [chapters@moaa.org](mailto:chapters@moaa.org) or through the online Chapter Member Gain Form. To access the form, visit the Chapter Recruiting 2017 website at: [www.moaa.org/chapterrecruiting](http://www.moaa.org/chapterrecruiting) and scroll down to tools and click on the icon titled Report A New Chapter Member.

Return of the voucher to MOAA is not required since member records are electronically flagged. The Council and Chapter Affairs Department updates chapters monthly on new chapter member gains and their incentive status.

Those new chapter members who submit a voucher should not be required to pay chapter dues for the time period specified by the voucher. During the year-end payout process, MOAA will provide your chapter with a rebate of \$15 for each eligible PREMIUM member and \$30 for each eligible LIFE member who joins your chapter. All voucher payouts are through EFT.

NOTE: Existing PREMIUM or LIFE members **and/or** chapter members on your current chapter roster, and chapter members on your chapter roster within the past three years are not eligible to receive a voucher. Also, the chapter voucher program cannot be combined with other Chapter Recruiting 2017 incentives. Each new chapter member recruited is eligible for only one type of incentive payout.

## National MOAA Membership Model

Effective Jan. 1, 2013, MOAA launched a new three-tier model of membership. The new membership model will provide a new connection with currently serving officers; a better bundled package of services for those nearing military retirement and those in their second careers; and a renewed emphasis to be all we can be to LIFE members.

### **BASIC Membership**

This model expands MOAA's reach to younger officers currently in uniform by offering a relevant and compelling electronic experience (at no fee), and emphasizes no one advocates more strongly for them than MOAA. Features include:

- Promoting a strong national defense. MOAA advocates for a strong, top quality career force with compensation and benefits for military members, retirees, veterans, and their families and survivors that is commensurate with the extraordinary demands and sacrifices imposed upon them.
- BASIC members will receive tailored communications about the legislative issues that impact them and their families.
- Includes information on the importance of chapter membership and how to locate the nearest chapter.
- Anyone can join as a BASIC member, but members over age 35 are limited to two years. After two years, these BASIC members will either lapse to a Prospect or upgrade to a PREMIUM or LIFE membership.

### **PREMIUM Membership**

We offer a more comprehensive package of products and services to help these members navigate personally and professionally throughout every stage of their lives by:

- Providing second career search and transition assistance.
- Providing valuable advice on financial and insurance needs.
- Becoming their new unit of assignment in retirement. We wore their same uniforms and now work to protect what they've earned through a career of service and sacrifice.
- Building on the idea of chapter membership as part of their MOAA membership experience, new PREMIUM members (non-chapter members) receive a voucher good for a one-year membership in their local chapter.

### **LIFE Membership**

LIFE members are the regular commissioned component of MOAA membership, which represents half of all MOAA members today. MOAA will capitalize on the activism of LIFE members by encouraging them to continue to serve in their communities by:

- Further connecting them to our council and chapter network by offering them opportunities to make a difference. New LIFE members (non-chapter members) receive a voucher good for a two-year membership in their local chapter.
- Offering enhanced LIFE Membership benefits and privileges with transferability to spouse.
- Note: Anyone can be a LIFE member at any time. You can access the LIFE rate schedule through the "Why Join" section on the MOAA home page and by calling the MOAA's Member Service Center (800) 234-6622. LIFE Membership has a separate Dual Military Spouse rate schedule.

## **National MOAA Membership Incentives**

The new national MOAA membership model increases the value of membership for all officers. In addition, it helps MOAA to continue growing in the coming years; thereby, strengthening our voice on Capitol Hill.

Check out these incentive programs to help recruit new MOAA national members.

### **MOAA memberships for currently serving/former/retired officers/survivors**

- \$100 chapter incentive for recruiting new PREMIUM members (minimum of 5 to qualify)
- \$200 chapter incentive for recruiting new LIFE members (minimum of 5 to qualify)
- Note: Recruiters must return a completed PREMIUM or LIFE application form with a valid membership information accompanied by an individual payment.



## National MOAA Membership Talking Points

- MOAA has been in existence for over 86 years
- The largest association of officers with over 390,000 members
- Over 400 affiliates nationwide
- We're co-chair of the 33-member Military Coalition
- Even though we're an association of officers, our primary focus is advocacy on the Hill for all uniformed service members in all components and their families
- Noteworthy legislative gains are:
  - Fought for TRICARE for Life
  - Eliminated "Widow's Tax" for Survivor Benefit Plan by Social Security Payments
  - Repealed CPI-1% COLA cut for military retirees entering service after Jan 1, 2016
  - Retained dual military couple housing allowance eligibility
  - Fought for and won the Post 9/11 GI Bill
- Legislative Goals:
  - Remove the sequester
  - End disabled/survivor financial offsets and penalties
  - Ensure TRICARE reform sustains access to and performance of top quality care
  - Prevent disproportional TRICARE fee hikes and inordinate program changes
  - Guard against erosion of earned compensation and commissary benefits
- Numerous discounts on products and services:
  - Dell and Apple products
  - Insurance plans
  - Benefits information
  - Transition and job assistance
  - Scholarships and education assistance
- BASIC membership is free and all electronic
- 2017 PREMIUM membership rates are \$43 annually (\$40 surviving spouse) and \$105 for a three year (\$95 surviving spouse) membership
- LIFE membership rates are tiered based on age

## Training Tools

MOAA national sponsors council and chapter leaders' training opportunities, to bring council and chapter leaders together for specialized training.

To better address key chapter-management issues, MOAA national will offer webinar tutorials and quarterly regional workshops to supplement council leadership training events. No singular factor influences a chapter's success more than its leadership, so we hope this tool provides you with information to make chapter management a little bit easier while you address the needs of your members.

All webinars are recorded and archived so you can view them at your convenience from your personal computer. Visit MOAA's website to view these recently archived <http://www.moaa.org/Content/Chapters-and-Councils/Council-and-Chapter-Management/Webinars.aspx> such as: legislative affairs, event planning, online chapter membership dues joins and renewal, chapter membership roster submission and more.

## USAA/MOAA Sponsorship Program

We're fortunate -- our affinity associate, USAA, recognizes that many noteworthy community-focused programs and events initiated by MOAA Councils and Chapters need financial support to "get to the finish line"! So USAA, in partnership with MOAA National, has established a fund to provide some financial backing to councils and chapters.

Each council and each chapter may make one request per calendar year. The council must be at the state level; the program does not apply to area and regional subsets of the council system. To fair share the funding across the council and chapter system, the maximum you can expect is \$300 to support your chapter event or \$800 to support your state council event. Please note the council and chapter cannot make a request for the same event. Approved requests are distributed on a first come – first serve basis, so we highly encourage you to submit your 2017 request in as early as possible.

Please read the instructions and frequently asked questions before proceeding to the online submission form: <http://www.moaa.org/USAAsponsorship/>.

**Step 1:** Determine whether your project or program meets the established guidelines for USAA/MOAA sponsorship funding support. Generally, the event must be something that serves the community at large and extends beyond your immediate council and chapter. Some examples which would meet the spirit and intent of the program would be state council conventions; chapter events which recognize ROTC/JROTC students and enhance relationships with those schools; and golf tournaments or fundraising events for chapter scholarship or awards programs. Some examples, which do not meet the criteria for funding support, would be political or advocacy events, stand-alone chapter recruiting activities, chapter luncheon/dinner events to offset chapter member meal costs, and direct contributions to your chapter scholarship program.

**Step 2:** Gather all the information you will need to complete the online form. The required information will include name and date of event, location, expected attendees, brief description and summary of your community service project/program needs, how you plan to recognize USAA and your council/chapter contact information.

**Step 3:** Complete the form and submit. You will receive an email that confirms your request and lets you know when you can expect an answer. MOAA National will review all requests for appropriate use of funding. If MOAA national has any questions or requires additional clarification, they will contact the POC listed on the form via email or phone, prior to forwarding to USAA for approval.

**Step 4:** MOAA National forwards the sponsorship request to USAA for final approval. The council and chapter will be notified promptly, if the request has been denied. Upon approval, USAA will disburse funds to the council/chapter 5-7 days prior to the actual event. As a reminder, please note that in return for USAA's sponsorship, you accept a commitment to recognize USAA as a sponsor or contributor at the applicable event. We anticipate many requests so we ask that you allow at least 45 business days for processing.

## Frequently Asked Questions

**Q: WHAT IS THE CHAPTER RECRUITING CAMPAIGN?**

**A:** Chapter Recruiting 2017 provides a single effort to recruit new chapter members. The ultimate goal for MOAA is to remain the premier military advocacy organization that can affect legislation and make a difference in the quality of life for all members of the military and their families. Our chapter system is critical to attaining that goal.

**Q: CAN I REALLY MAKE A DIFFERENCE?**

**A:** Yes, MOAA chapter members are more than just members. They successfully influence federal, state and local government. They recognize outstanding young people such as junior ROTC and ROTC cadets, and run service projects that benefit their communities. And, while doing so, they develop close and lasting friendships with other members with similar backgrounds and interests.

**Q: WHO IS ELIGIBLE TO PARTICIPATE?**

**A:** All MOAA council and chapter members.

**Q: WHAT ARE THE INCENTIVES OR AWARDS FOR CHAPTER RECRUITING AND RETENTION PARTICIPATION?**

**A:** Please see Chapter Recruiting Awards and Incentives section of this guide for details.

**Q: HOW DO I GET MORE ENROLLMENT FORMS?**

**A:** The MOAA membership enrollment form is available and suitable for downloading and printing from your computer.  
[http://www.moaa.org/uploadedFiles/Content/Chapters\\_and\\_Councils/Chapter\\_Recruiting/Bridge\\_to\\_MOAA\\_National/CR2013-MOAA%20Basic%20Premium%20Brochure.pdf](http://www.moaa.org/uploadedFiles/Content/Chapters_and_Councils/Chapter_Recruiting/Bridge_to_MOAA_National/CR2013-MOAA%20Basic%20Premium%20Brochure.pdf). You can also request additional hard copies of all forms and brochures by contacting the MOAA Member Service Center by emailing [msc@moaa.org](mailto:msc@moaa.org) or calling (800) 234-6622. Please be sure to identify your chapter and the name of the requestor.

**Q: HOW DO WE NOTIFY NATIONAL OF THE CHAPTER MEMBERS WE HAVE RECRUITED?**

**A:** Chapter Recruiting 2017 features a reporting mechanism — the online Chapter Member Gains Form — to report new chapter members in real time to MOAA, where we will enter them to your chapter roster and provide weekly reports by chapter size category and by state. You can access the form on the MOAA website.

Fill out the information requested, and MOAA will acknowledge receipt of the information and list the names of the new chapter members submitted. We developed this on-line form in an attempt to simplify the process of reporting new members. If you prefer to consolidate and send in the information on an excel spreadsheet, that is an acceptable option, too, but it slows down the process. Please send your information on an excel spreadsheet to [chapters@moaa.org](mailto:chapters@moaa.org).

**Q: WHEN DOES THE CHAPTER RECRUITING CAMPAIGN RUN?**

**A:** The campaign runs throughout the calendar year Jan 1 – Dec 26, 2017. However, any new chapter members reported after your official roster submission will not be processed until April 1, 2017. Note: all the new incentive qualified chapter members recruited in the Jan 1<sup>st</sup> to Apr 1<sup>st</sup> window will be credited on the 1 Apr – 30 Jun quarterly awards.

**Q: HOW WILL WE KNOW HOW WE'RE DOING IN THE COMPETITION?**

**A:** MOAA's Council and Chapter Affairs office post weekly updates beginning Apr 2017 on the MOAA web site along with monthly email updates to each council and chapter president.

**Q: WHAT ARE THE INCENTIVES FOR OTHER NATIONAL MOAA MEMBERSHIP OFFERS?**

**A:** One of MOAA's strengths has been the significant number of members we represent—over 390,000—giving us the strength to be heard on Capitol Hill and preserve your benefits. Recruiting new national MOAA members will not only strengthen chapters, it will also help MOAA maintain a strong and effective advocacy presence for our members. We encourage councils and chapters to recruit chapter members who are not currently members of the national MOAA organization, as well as other prospective members (former, retired, active duty, Guard and Reserve officers, and surviving spouses). They can be recruited as BASIC, PREMIUM or LIFE members.

No additional monetary incentives are provided for BASIC members. As a reminder, a valid email address is required for BASIC membership. For every 5 new paid PREMIUM members the chapter is eligible to receive \$100 and for every 5 new paid LIFE members the chapter is eligible to receive \$200.

**Q: HOW DO WE NOTIFY NATIONAL OF THE NEW NATIONAL MOAA MEMBERS WE HAVE RECRUITED?**

**A:** When mailing in your completed enrollment forms we encourage you to enclose more than one form in each envelope, but each new paid member enrollment must be accompanied by an individual payment. If you decide to mail the enrollment forms to prospective members, be sure you include your chapter's name before sending them out!

**Mail PREMIUM/LIFE (Paid) Enrollment Forms to:**

MOAA, P. O. Box 1488, Merrifield, VA 22116-9820

**Mail BASIC (Free) Membership Forms to:**

MOAA, 201 N. Washington St., Alexandria, VA 22314-9975

**Q: WHAT IS THE DIFFERENCE BETWEEN THE ONLINE CHAPTER MEMBER DUES TOOL AND ELECTRONIC FUNDS TRANSFER (EFT) PROGRAM?**

**A:** The online chapter member dues tool offers chapter members an option to renew their chapter memberships online using their debit/credit card, with all funds collected deposited electronically in the chapter's bank account on the 5<sup>th</sup> of each month. Check out details here: <http://www.moaa.org/Content/Chapters-and-Councils/Chapter-Recruiting/Recruiting-Materials/Online-Chapter-Membership-Dues-Join-and-Renewal.aspx>

The EFT program is utilized by national MOAA to speed up the distribution of incentive money earned through the Chapter Recruiting 2017 campaign. Not only will you receive the funds sooner, EFT will also reduce instances of lost, misplaced, and/or uncashed payout checks. Call MOAA at (800) 234-6622 to sign up today!

**Q: WHERE CAN I FIND SOME ADDITIONAL KEY INFORMATIONS?**

**A:** Please visit the MOAA website for important information on these topic areas:

Officer Updates - help national MOAA keep records up to date on your organization's leadership: <http://www.moaa.org/components/templates/Council-and-Chapter-Management.aspx>

The [Council and Chapter Policies and Procedures Guide](#) contains everything council and chapter leaders need to start, run, and manage a MOAA affiliate.

Webinar training series - national MOAA facilitates periodic training webinars to address key council and chapter management issues. All training webinars are recorded and available for viewing here by chapter and council leaders. [http://www.moaa.org/main\\_article.aspx?id=14390](http://www.moaa.org/main_article.aspx?id=14390)

Council and Chapter Communications - find useful information on how to create your council and chapter MOAA Website and newsletter <http://www.moaa.org/Content/Chapters-and-Councils/Council-and-Chapter-eNewsletters/Council-and-Chapter-Communications/Council-and-Chapter-Communications.aspx> .

Col Marvin J. Harris Communications Awards - Each year, national MOAA holds Communications Awards to identify those councils and chapters that do an outstanding job communicating with their members. Find out more: <http://www.moaa.org/communicationawards/>

Certificates of Recognition and Pins - National MOAA has certificates available for various types of recognition of individuals. Find out more: <http://www.moaa.org/Content/Chapters-and-Councils/MOAA-Awards/MOAA-Certificates-of-Recognition-and-Pins.aspx>

Levels of Excellence Awards - Councils and chapters may be recognized for one of two Levels of Excellence awards, find out more: [http://www.moaa.org/main\\_simplelist.aspx?id=9131](http://www.moaa.org/main_simplelist.aspx?id=9131)

Leadership Awards - Learn about two new awards we've instituted so we can better recognize your efforts to strengthen our association. <http://www.moaa.org/Content/Chapters-and-Councils/MOAA-Awards/Leadership-Awards.aspx>

Attention chapter treasurers! Get the details and sign up for MOAA's online chapter membership dues renewal tool. <http://www.moaa.org/Content/Chapters-and-Councils/Chapter-Recruiting/Recruiting-Materials/Online-Chapter-Membership-Dues-Join-and-Renewal.aspx>

USAA Sponsorship program - USAA is providing financial support to councils and chapters for various sponsorships. Find out more: <http://www.moaa.org/USAAsponsorship/>

The MOAA Store has a wide range of products: <http://www.targetlogosonline.com/moaa/>