

2022

Chapter Recruiting Program Guide



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1 February 2022

Dear Council / Chapter Leader:

Thank you for your continued support of the Military Officers Association of America and our members. You spearhead a critical component of mission accomplishment. By fostering camaraderie, conducting impactful community service, and engaging in grassroots advocacy, you raise awareness of our Association. Through awareness, you grow membership for national MOAA and your local chapter.

As our country emerges from a challenging health crisis that had many chapter recruiting programs at a standstill, we ask you to double down on recruiting: hold a “grand re-opening” event or a chapter happy hour and invite eligible recruits to join you. Think out of the box about changing-up meeting times, locations, and activities to attract new members. Create new interest groups (e.g., military history book club, ski club) in your chapter. Think about an event that welcomes spouses and children to join. Explore new ways to spread the word and promote your chapter. In this Guide, you will find tools, ideas, and incentives to help with your recruiting efforts. Please check out the chapter pages on www.moaa.org to find even more ideas for running an effective chapter. Take advantage of our monthly roundtables and other live and virtual training events to network with your counterparts and brainstorm solutions and best practices. Let us know if you have feedback or other ideas.

Your Council and Chapter Affairs team and your Association appreciate everything you do to demonstrate your commitment to Never Stop Serving!

Very respectfully,

Erin E Stone
CAPT, JAGC, USN (Ret)
Sr. Director, Council and Chapter Affairs
Military Officers Association of America (MOAA)

MEMBERSHIP INFORMATION

MOAA Membership Eligibility

Membership in the Military Officers Association of America is open to active duty, former, retired, and National Guard and Reserve commissioned and warrant officers of the eight U.S. uniformed services and their surviving spouses.

Background Information on MOAA's Affiliate System

- National MOAA board of directors approved the formal affiliation of councils and chapters in 1953. The first virtual chapter was chartered in 2016.
- Affiliates are independent, self-governing, and self-supporting organizations that choose to affiliate with national MOAA for the purpose of cooperation and mutual support in attaining common goals.
- There are nearly 400 affiliates nationwide (affiliates include councils, chapters and satellites).
- Affiliate members are highly encouraged to be national MOAA members.

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 might have only limited knowledge of MOAA's chapter system. Creating a dialogue and asking open-ended questions is the best way to find out if and how a chapter membership could help a prospective member. Find out as much as you can about their priorities in order to tailor a response that is more likely to resonate with them personally. Here are some aspects of membership that may appeal to them.

1. **Make yourself heard.** MOAA's chapters provide critical grassroots support for MOAA's national legislative agenda. Chapter members let their legislators know what's on their minds and open doors for MOAA's legislative team in Washington, D.C.
2. **Give 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 to serve and are giving back in the truest sense.
3. **Value added to chapter members' 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 servicemembers who have contacts in their communities that can be valuable to transitioning officers.
5. **Stay informed.** Chapter newsletters, websites, and meetings provide you with 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 chapters 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 veterans' 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, offering the opportunity to connect with others with similar backgrounds and interest and develop close and lasting friendships.

Recruiting Best Practices

- Every member is a recruiter!
- Establish recruiting budget line
- Create internal recruiting competition
- Build a recruiting package (invitation letter, current newsletter, membership application)
- Always carry recruiting info
- Place chapter membership applications on website
- Have a website or web presence
- Use social media to expand your reach (i.e., chapter Facebook page)
- Conduct meetings at different venues and times to meet member needs and encourage active participation
- Connect with base Retirement Services Office (RSO) or transition center
- Strive for and earn recruiting and retention incentives and awards
- Utilize Sales Training techniques

RECRUITING TOOLS

Electronic Funds Transfer Account

All active chapters should have an Electronic Funds Transfer (EFT) account, which is used by national MOAA to disperse monetary incentives, chapter dues, sponsorship money, etc., directly into the chapter's checking or savings account. EFT is the only method MOAA will use to disburse funds.

To register your chapter's bank account, we will need the following information:

- routing number of banking institution;
- account number;
- account type (i.e., checking or savings); and
- Chapter Point of Contact (name and email) to be notified whenever funds are transferred

To protect your information, we prefer you relay the requested information via telephone by calling MOAA at (800) 234-6622 and asking to speak with a Chapter Affairs Specialist, ext. 120, or ext. 168. If you choose to mail the requested information, you can send it to Council and Chapter Affairs, MOAA, 201 N. Washington St., Alexandria, VA 22314.

Weekly Recruitment Tracker

By the end of the business day each Friday, MOAA will post an updated recruitment tracker in the [Recruiting Section](#) of the chapters webpage. This tracker was developed so that chapter leaders can see their progress and should reflect updates Committee Module Administrators have made to their roster. The weekly tracker will display chapter name by category size, and two columns: (1) Chapter Members Added and (2) Receiving Incentives for (i.e. Incentive Qualified Members). The data will reflect calendar year recruits to date. At the end of the calendar year, the data will be used to calculate the annual recruiting incentive.

Chapter Voucher Program

The chapter voucher program invites national MOAA members to join their local chapter at no cost to the individual. All new (or upgraded) PREMIUM and LIFE national MOAA (non-chapter) members receive chapter vouchers in their new membership kits in the mail which can be redeemed for their free chapter membership. The letter also includes the name of their local chapter and how to contact them. PREMIUM members receive a voucher good for a one-year chapter membership, and LIFE members receive a two-year voucher. These same members will appear on the chapter's near real time (NRT) report on the Committee Module (see NRT section below). Chapters should connect with these new members and honor the free year(s) of chapter membership. Submission of the voucher to National MOAA is not required since member records are electronically flagged. Chapter membership dues are not reimbursed by national MOAA. The intent is for the chapter to embrace the new member so that they are compelled to stay and become a paid chapter member in future years.

Online Chapter Member Dues Join and Renewal Program

The Online Chapter Membership Dues Join and Renew tool is offered at no cost to chapters and allows participating chapters to offer single and multiyear chapter membership renewal to members, as well as an option to make a donation.

- Chapters must comply with all MOAA security and privacy standards. (Go to www.moaa.org/privacy for more information.)
- Each chapter sets its own annual chapter dues rate. A minimum of \$12 a 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 of the final month of your chapter's dues cycle.
- Newly joining members enter the chapter's annual dues cycle based on the month/day in which they submit their chapter membership payment via the online tool and their dues will be prorated for that year.
- All new joins and renewal confirmations will be sent to the account and email address furnished by the chapter as well as the new/renewing chapter member.
- Members may also make donations up to \$500 to the chapter.
- The system will collect the online payments (credit and debit cards only) and distribute to the chapter by EFT by the fifth day of the month following payment.

We encourage chapter leaders to learn more about the program and enroll today [using this link](#). You can also email chapters@moaa.org with any questions.

Common Join Form

In 2019, MOAA released the [Common Join Form](#) which consolidates enrollment for MOAA National membership and chapter membership. The form is intended to be customized with your chapter logo and information, duplicated, and either filled-in electronically or by hand by prospects. Detailed instructions on how to add your chapter's name and logo on the Fillable PDF or Word Document are available at this link: (1) [Fillable PDF Instructions](#). The (untailored) form is shown on the following page.

THE LARGER OUR NUMBERS, THE GREATER YOUR VOICE.

Why MOAA chapter membership matters.



MEMBERSHIP ENROLLMENT FORM FOR MOAA AND [REDACTED]

Name [REDACTED]
Rank [REDACTED] Branch of Service [REDACTED]
 Active Retired Former Reserve National Guard Surviving Spouse
Spouse name [REDACTED]
Address [REDACTED]
City [REDACTED] State [REDACTED] ZIP [REDACTED]
Date of birth [REDACTED] Telephone [REDACTED]
Email [REDACTED]

(To ensure deliverability of MOAA communications, please provide a personal email address.)

Are you a member of MOAA? Yes No Unknown
MOAA Member Number (if known) [REDACTED]

Not a MOAA national member yet? Check here to receive a BASIC Membership at no cost to you. **BASIC**

And, for less than \$5 a month, you can upgrade to **PREMIUM** membership, giving you immediate access to a full spectrum of career and financial resources, exclusive publications, college scholarships for dependents, and countless discounts on products and travel. Visit moaa.org/join to learn more.

How did you hear about MOAA Chapter involvement? [REDACTED]
Are you a member of any other MOAA Chapter(s)? Yes No
If yes, which one(s)? [REDACTED]

To complete enrollment:

- Fill in this form on your computer, save it, and email it to [REDACTED] as an attachment. Do not include credit card information. We will contact you to finalize payment if required; or
- Print it out, fill it in by hand, and mail it with a check made out to [REDACTED]; or
- Go to [REDACTED]

You will be opted in to receive e-communications from MOAA and your local chapter. You will be able to opt out of any further e-communications at any time. MOAA will not sell or share personal information.

Chapter membership and dues information:

[REDACTED]

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 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 (or virtual platform information), 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), and
- council or chapter president signature block information.

When composing your message, fill in the blanks with the appropriate relevant content and ensure proper grammar, punctuation, and sentence structure. We cannot email images, forms, or 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 may edit to meet message-formatting requirements.

National MOAA requires 60 days advance notice to process the message and allow sufficient time for you to promote the event. We look forward to assisting our councils and chapters in marketing their events.

To submit your request for the Chapter Electronic Support Message [use this link](#).

If you have questions on this program, email chapters@moaa.org.

Near Real Time (NRT) Report

The Near Real Time (NRT) report is a monthly recruiting list which includes non-chapter MOAA members for chapters to recruit into their chapter. Members listed on this report are in the chapter's catchment area and fall into one of three categories:

- (1) brand new MOAA member [BASIC, PREMIUM or LIFE];
- (2) MOAA members who recently moved into the chapter's geographic catchment area; and
- (3) members who recently opted-in to receive chapter communications.

Each chapter will have a refreshed list of NRT recruits on the Committee Module every month. (If there were no new joins, people who recently moved into your catchment area, or people who recently opted to receive chapter communications the previous month, your list will not contain any member data for the new month.) Chapter Committee Module administrators are encouraged to make contact with people on the list as soon as possible, at least prior to your next month's NRT report. We suggest saving the list each month, as it is not cumulative and the names will not reappear the following month. Committee Module administrators can find instructions about accessing and saving the NRT report, [using this link](#).

You should also check for updates on the "No Contact report" which indicates anyone who *opted-out* of chapter communications since the previous month's update. Any new person who opts-out of chapter communications will show up at the top of the cumulative "No Contact report".

Comply with the following MOAA guidelines concerning email addresses provided by MOAA national:

- The email addresses may only be used for official chapter communications inviting the addressees to join the chapter, attend chapter events, or participate in chapter activities.
- No more than three email messages may be sent to any addressee during a single calendar year.
- The email list may not be shared with any other organization or individual without the advance written authorization of the Director, Council and Chapter Affairs.
- Any files containing MOAA-provided email addresses shall be maintained in a secure manner, password-protected and accessible only by authorized chapter officers.
- Once an individual joins the chapter and becomes a chapter member, their email address may be added to the chapter's membership records and normal chapter correspondence from that date forward may occur. However, in today's environment it is prudent for chapter leadership to routinely take the appropriate steps to ensure the security and safe guarding of all members sensitive personal information.

As you move through your list, please identify any incorrect names, addresses, phone numbers, or other contact information you might find, and send your annotated list to MOAA via email (MSC@moaa.org) or send a hard copy to MOAA, 201 N. Washington St., Alexandria, VA 22314, ATTN: Member Service Center. 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 NRT report (aka "recruiting list").

- BASIC members – this class of members has a very limited amount of data. You might consider a short email message inviting them to your chapter for a meeting and including a newsletter so the new recruit can see what community engagement your chapter is/has been involved with.
- Premium and LIFE members – these prospects often are easier to recruit because they are already sold on the benefits of being a MOAA member. If there’s a phone number or email listed in their record, use this method first. If not, the mailing address can be used to send them a note inviting them to a chapter meeting of their choice.
- Surviving spouses are an untapped resource. Besides recruiting those on your NRT report, use the surviving spouse virtual chapter and spouses’ clubs in your area to find and recruit them.
- 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.
- Follow up by mailing an invitation to join the chapter, particularly if you’ve not received a response to phone calls and emails.
- Get help from other members in your chapter. Everyone should be engaged in the recruiting effort.

Recruiting and Documenting New Chapter Members

We encourage you to ensure all existing chapter members are national MOAA members (at least at the BASIC level), and recruit new members for national MOAA when you recruit them for the chapter. The Common Join Form is an easy way to do both at the same time.

For existing chapter members, chapter leadership needs to obtain and document consent of the chapter member to join national MOAA, even at the free BASIC level. It is acceptable to document consent at the local level by either the chapter leader or the member initialing a print-out of the chapter roster, or some similar means. Notify MOAA national of the change in membership status using any of the below methods.

Enroll new BASIC (free) memberships on the enclosed “[Common Join Form](#)” or bulk multiple memberships via [Excel spreadsheet](#). As a reminder, a valid email address is required for BASIC membership. We encourage providing BASIC enrollments electronically. However, you prefer to mail them, please retain a copy of these memberships for your records.

Mail BASIC Membership Forms to:

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

Enroll PREMIUM/LIFE members electronically or using a paper MOAA membership enrollment form. A printer-friendly version of the MOAA membership enrollment form for PREMIUM and LIFE is available for downloading and printing from your computer: [online enrollment](#)

A signed check or credit-card instructions must accompany each enrollment form.

Mail PREMIUM/LIFE (Paid) Enrollment Forms to:

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

Note: For an individual to qualify as a new recruit, they must know, understand, and consent to becoming a local chapter member. This acknowledgment most often is accomplished by signing a

chapter membership application or common join form, by completing an online application, or during a conversation with the potential member.

New chapter members need to be added to the chapter’s roster in order to notify National MOAA of the membership. New chapter members can be added in one of two ways.

1. Add a new chapter member (who is already a MOAA member) using the Committee Module by first locating their record through the module. When conducting a search, you must have the person’s customer ID or email address. If you know the new member is **NOT** a MOAA member and has never joined MOAA before, use method 2 below. For instructions on adding the new chapter member to the Committee Module, review the [Committee Module instructional guide](#).
2. For a new chapter member who does not already belong to MOAA:
 - a. For a single member, use the [online enrollment](#) form for paid membership; or, use the [Common Join Form](#) for basic membership enrollment.
 - b. Particularly when reporting more than five new members at one time, it is acceptable to consolidate and submit the information on an Excel spreadsheet to MSC@moaa.org. See below for instructions:
 - i. [file:///C:/Users/victoriat/Downloads/c-c-guide-to-basic-membership%20\(10\).pdf](file:///C:/Users/victoriat/Downloads/c-c-guide-to-basic-membership%20(10).pdf)

3 STEPS – WHEN SUBMITTING AN EXCEL SPREADSHEET TO MOAA HEADQUARTERS FOR MULTIPLE NEW BASIC MEMBERS

Step One:

Prepare Excel list of eligible prospects (**below is an example**)

Last Name	First Name	MI	Addr	City	St	Zip	Email	Rank	Serv	Status	Category	Type of Consent	Date of Consent
Smith	Robert	L	123 Foster Ln	Lake Forest	MD	20744	Rob987@icom.com	Col	USAF	Ret	Prosp	Signature	6/6/19
Lane	Mrs. Julie	S	321 Foster Ln	Lake Forest	MD	20744	Julie345@icom.com				Surviving Spouse	Signature	6/6/19

Step Two:

Ensure that the Excel list includes these column headings: Prefix (i.e. Mr., Mrs., Ms. or Miss for Surviving Spouses or Former Officers) / First Name / Middle Initial / Last Name / Rank / Service / Status (i.e. active duty, retired or former officer) / ***Email address** / Surviving Spouse – include: all of the above except rank/service

Optional for Basic Membership: Mailing address / Phone number / DOB (if known) / Spouse Name

Step Three:

Provide completed Excel list to MOAA’s Member Service Center (MSC) at MSC@moaa.org; Copy email with Excel list to Chapters@moaa.org

Verification and Add to CM:

Please allow the MSC staff up to 3 – 5 business days to process memberships;

Committee Module Administrator can then use the email address to verify and add these members to their CM roster.

RELATED RESOURCES

Training Opportunities

National MOAA sponsors council and chapter leaders' training workshops to bring council and chapter leaders together for specialized training, to include recruiting and retention. Contingent on the state of health-related travel restrictions, we tentatively plan to schedule 2022 workshops in the following locations. Affiliates in the local area will be invited to attend.

Jan 7-8	Florida Leadership Seminar
June 3-4	Northwest W/S Tacoma, WA
Aug 12-13	Mid-Atlantic W/S Raleigh, NC
Sep 23-24	Middle U.S. Omaha, NE
Nov 18-19	Texas

The workbook and recordings from the most recent workshop are available on the training resources section of our webpage. Additionally, to better address key chapter-management issues, national MOAA offers recorded webinars on individual topics which may be viewed at your convenience from your personal computer. Visit MOAA's website (<https://www.moaa.org/content/chapters-and-councils/chapter-and-council-webinars/>) to view archived webinars such as legislative affairs, event planning, online chapter membership dues joins and renewal, chapter membership roster submission, and more. We also recommend watching and using the following two videos to refresh yourself and educate potential recruits on the benefits of MOAA:

[Year in Review](#)

[Why MOAA](#)

Finally, the MOAA National staff and directors make visits to chapters every 2-3 years, in part to provide individualized assistance with recruiting and retention challenges. In person and virtual visits can be scheduled here: <https://www.moaa.org/content/chapters-and-councils/council-and-chapter-management/initial-chapter-visit-request/>

Awards

Consider affiliate awards (such as Communications Awards and Levels of Excellence awards) and individual awards (such as leadership awards, legislative liaison awards, and surviving spouse liaison awards) as ways to build morale and encourage retention and leadership succession. More information on all of these can be found here: <https://www.moaa.org/content/chapters-and-councils/chapters-and-councils/council-and-chapter-awards/>

Community Relations Support

Being active and visible in the community is one way to attract new members to your chapter, and national MOAA encourages activities that contribute to community welfare. Studies have shown that younger generations, in particular, are attracted to organizations that make an impact, and are prone to joining those that offer "activities." To maximize recruiting potential, wear MOAA gear, advertise the event in advance, and try to follow-up by posting stories about the event in the local newspaper, installation publications, your chapter and national MOAA newsletters, and social media. National MOAA has two programs to assist with funding community relations projects.

Community Outreach Sponsorship Program

MOAA provides financial support for community relations activities and supplies which aid in outreach and recruiting (such as a banner or table covering with your chapter logo). An event must encompass the entire geographic area of the applying council and chapter. Some examples that would meet the spirit and intent of the program would be council conventions, chapter events that recognize ROTC/Junior ROTC students and enhance relationships with those schools, and recruiting events. Political or advocacy events and direct contributions to your chapter scholarship program are not supported by this program.

Councils can receive one sponsorship of up to \$800 and chapters can receive up to \$300 each calendar year. Requests are addressed by MOAA on a first-come, first-served basis until funds are expended. The council or chapter will be notified of approval status and will receive the funds via EFT within 30 business days after the application is submitted.

View instructions and apply here: <https://www.moaa.org/content/chapters-and-councils/council-and-chapter-management/community-outreach-sponsorship-for-moaa/>.

The MOAA Foundation Community Outreach Grants

The MOAA Foundation Community Outreach program provides grants to MOAA councils and chapters delivering services-either directly or through partnerships with other community organizations- in one of nine areas of critical military and veteran family need:

- Housing
- Food Assistance
- Employment
- Health (including Behavioral Health)
- Family Support
- Community Reintegration
- Financial Assistance
- Legal Assistance
- Transportation

Many MOAA councils and chapters are engaged in this high-impact community work. Read about the program, scoring and grant criteria [using this link](#). Apply for a grant [using this link](#).

Internet Presence

Publicity creates favorable recognition of the chapter in the local community, thereby attracting new members. Younger members, in particular, get their news online and a chapter with an established presence online will have greater reach than one relying solely on traditional media. Consult the Policies and Procedures Guide [using this link](#) for more detail on the following tools and/or contact chapters@moaa.org for help on getting any of the following started:

Chapter Web Presence: Every chapter should have a professional and attractive webpage. If your chapter does not already have one, contact national MOAA about free web presence so that potential members can easily find and contact your chapter.

Social Media: Consider a private or public Facebook page, Twitter account, and/or Instagram account to publicize activities and keep members engaged between meetings.

Newsletters: Chapters are highly encouraged to electronically distribute a monthly newsletter.

Virtual Tools: Consider virtual meetings or a virtual option for members or potential members who may be interested in attending meetings but are physically unable to do so. Councils currently receive a stipend from MOAA national to pay for a virtual meeting platform and are encouraged to offer to host meetings for their member chapters.

Annual Recruiting Incentive (Premium and LIFE)

Chapters will earn \$15 for every incentive-qualified PREMIUM member, and \$30 for every incentive-qualified LIFE member who is new or upgrades membership level during the calendar year. **Please note:** Chapters that recruit new members who previously held chapter membership within a three-year gap period will not receive incentives for the members being added to a chapter's committee module (CM) roster. Incentives will be paid by EFT in January of 2023.