

# Monthly Leadership Roundtable: Recruiting and Retention

July 23, 2026



# ACC Updates



# Administrative Updates

- Congrats to Frank on birth of his first grandchild!
- Program Manager Position Filled
  - Teagan O'Bar will be filling the position vacated by Victoria Twyne, starting July 27
- Chapter and Council Surveys Due July 31
  - To date, 95 chapters and 15 councils have responded

# Program Updates

- Support of Prospective Member Data Push Continues
- Virtual Council & Chapter Leaders Workshop for Experienced Leaders
  - August 12, 10:30am – 4:30 pm EDT
  - Open to all
  - Registration coming soon
- August 26 – Space A travel webinar:  
[www.moaa.org/events](http://www.moaa.org/events)

# Program Updates

- MOAA Store Update
  - Finalizing contract with new vendor, expect to be open in August
  - Will include ROTC medals
- Revised Affiliated Councils and Chapter Webpage operational soon
  - New chapter locator, new chapter events calendar

# 2026 Biennial Membership Voting Cycle

- Please encourage participation in Board elections and bylaw votes
- All voting is electronic – portal open 1 – 31 August
- Will send individual URL ballot links to email of record (Member ID) – no cumbersome log in
- Membership roll cutoff is July 15<sup>th</sup>
- One vote per member
- Results gathered and reported by third-party vendor

# 2026 Roundtable Schedule

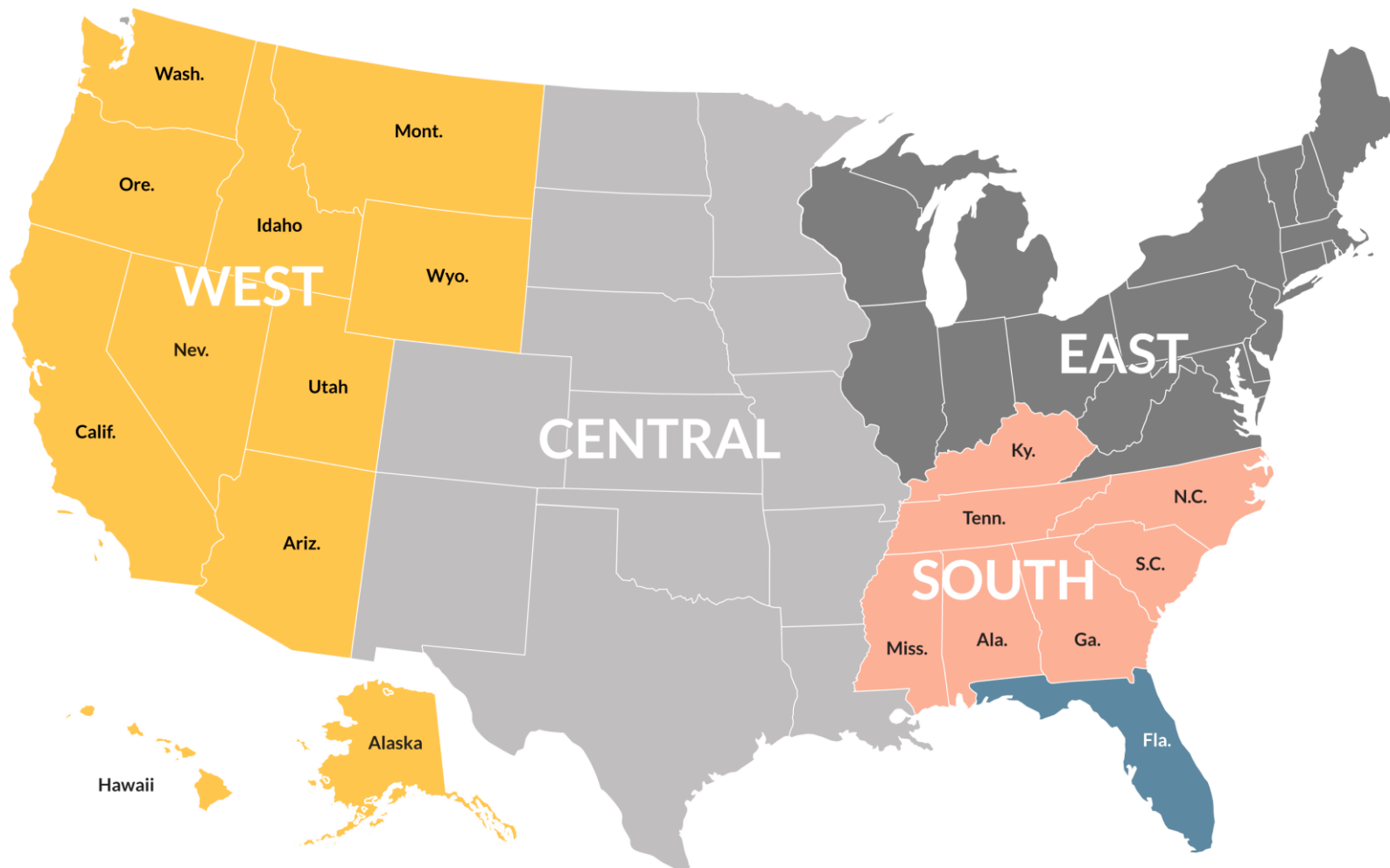
|                                                          |                                        |                                             |                                                   |
|----------------------------------------------------------|----------------------------------------|---------------------------------------------|---------------------------------------------------|
| January 22<br>Privacy Policy<br>Implementation<br>Update | February 26<br>Committee<br>Module/NRT | March 26<br>Advocacy in Action<br>Logistics | April 23<br>Chapter Dues Pay<br>Portal            |
| May 14*<br>Chapter Visit and<br>Awards Programs          | June 25<br>General Counsel<br>Issues   | July 23<br>Recruiting and<br>Retention      | August 27<br>MOAA Virtual<br>Chapters             |
| September 24<br>Council and Chapter<br>Mentorship        | Oct TBD<br>MOAA Charities              | November 19*<br>MOAA Annual<br>Awards       | December 17*<br>Year in<br>Review/2026<br>Outlook |

7:00 pm ET

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



# 2026 Leader Training Workshops



**Leadership Seminar**  
**Orlando, FL**  
**January 29-31**  
FL, Other C&C by  
invitation

**Virtual W/S**  
**New Leaders**  
**March 4**  
(10:30a-4:30p  
Eastern)

**West W/S**  
**San Diego**  
**May 28-29**  
AK, AZ, CA, HI, ID, MT,  
NV, OR, UT, WA, WY

**Virtual W/S**  
**Experienced Leaders**  
**August 12**  
(10:30a-4:30p  
Eastern)

**South W/S**  
**Chattanooga, TN**  
**November 16 & 17**  
AL, FL, GA, KY, MS,  
NC, SC, TN, VA

# Questions and Discussion





# Recruitment & Retention

## National and Chapters Working Together



# 357,041

## Members Strong...and Growing

### Military Status

30% Active  
51% Retired  
6% Former  
14% Surviving  
Spouse + Unknown

### Average Age

Overall: 67.2

LIFE: 78.7  
PREMIUM: 72.3  
BASIC: 56.6

Officer: 65.9  
Surviving Spouse: 86.9

### Membership Category

41% LIFE  
9% PREMIUM  
50% BASIC

# Attracting Younger Officers into MOAA Membership

As MOAA's membership continues to age, MOAA must find ways to increase awareness among younger demographics and identify effective engagement and recruitment opportunities for this audience.

# Fostering Strong Partnerships

## Academy Alumni Associations

- West Point Association of Graduates
- USNA Alumni Association & Foundation
- USAFA Association & Foundation
  - Online portals allowing their members to join MOAA & numerous recognition opportunities
- USCGA Alumni Association
  - Numerous activities & recognition opportunities

## ROTC Programs

- Virginia Military Institute
- University of North Georgia
- The Citadel, Notre Dame, George Mason University
- Existing chapter partnerships – 50 chapters connected with more than 80 programs

## Other Valuable Connections

- The Department of the Air Force Company Grade Officers Council (DAFCGOC)
  - MOAA Fireside Chat Webinar (Aug)
  - Networking social during the AFA Cybersecurity Conference (Sept)
- Focus on working with CGOCs of other branches



# Younger Officer Engagement for Chapters Take-aways



The image shows two pages from the MOAA O-1 Guide. The top page is titled 'UNDERSTANDING ADVOCACY AND BENEFITS' and features a photo of four military officers. The bottom page is titled 'PREPARING FOR YOUR FIRST DUTY STATION' and lists various tasks under 'PAPERWORK & ADMIN' and 'FINANCE & HOUSING'.

**THE O-1 GUIDE**

## UNDERSTANDING ADVOCACY AND BENEFITS

Congratulations! As a newly commissioned officer, you're stepping into a vital leadership role. From the start, it's important to understand how government decisions affect you and those you lead, and to know who's advocating for you. That's where the Military Officers Association of America (MOAA) comes in—to support your transition from cadet or midshipman to officer.

To support your start, MOAA offers a free BASIC membership designed for newly commissioned officers, as well as cadets and midshipmen.

**MOAA'S MISSION**

As champions of the uniformed services community, MOAA is dedicated to both protecting hard-earned benefits and providing resources and programs that make a difference in the lives of those who serve and have served, and their families.

We are a member-based organization, driven by the strength and engagement of our community. We are looking out for you, and the more we grow, the more significant our impact.

**WHAT ARE EARNED BENEFITS?**

From basic pay to the GI bill, from health care to retirement (and much more), your earned benefits recognize your service and commitment by providing support for you and your family.

They also include entitlements that help you financially prepare for your first duty station, such as:

- **Permanent Change-of-Station (PCS)** allowances to help with your move
- **Basic Allowance for Housing (BAH)** to assist with housing costs
- **Temporary Lodging Allowance (TLA)** for short-term

**THE O-1 GUIDE**

## PREPARING FOR YOUR FIRST DUTY STATION

Wondering what your first orders will include, or how to make a smooth transition into your first assignment? This list gives you an idea of what to expect after commissioning.

**PAPERWORK & ADMIN**

Gather and organize essential documents:

- Orders (Permanent Change-of-Station (PCS) orders and any amendments)
- Driver's license, vehicle registration, insurance
- Marriage certificate and birth certificates, including those for your dependents if relevant
- Military ID/Common Access Card (CAC)
- Leave form with signatures
- Medical and dental records, as some locations will ask
- Flight itinerary and travel receipts (if you have Temporary Duty (TDY) en route)
- Vehicle shipping and pickup paperwork, if applicable
- Record of Emergency Data and SGLI (Servicemembers' Group Life Insurance) updated
- Copies of birth certificate and Social Security card, sometimes needed for housing and banking

**FINANCE & HOUSING**

- Set up or update myPay for Leave and Earnings Statement (LES) access
- Double-check Basic Allowance for Housing (BAH) rate for your new location
- Apply for housing on post or find approved off-post housing
- Check Temporary Lodging Allowance (TLA)/Temporary Lodging Expense (TLE) eligibility if staying in temporary lodging
- Request Dislocation Allowance (DLA) to help cover the costs associated with PCS
- Submit travel voucher (through DTS or with Finance office)
- Budget for move-in expenses, like furniture and deposits
- If needed, explore applying for advanced pay, which is an interest free loan against your future base pay

- **For Chapters Without ROTC Relationships:**
  - Initiate personal outreach to local colleges or universities
    - Learn what cadets/midshipmen need and identify where MOAA or your chapter can help
  - Offer national ROTC resources to introduce your chapter and build credibility
- **For Chapters With Existing ROTC Relationships:**
  - Integrate new MOAA resources into your current programming.
- **Access the O-1 Resources:**
  - To receive digital copies of ROTC materials, please email Brittni Rhoads at [brittnir@moaa.org](mailto:brittnir@moaa.org)

# Strengthening Paid Membership

Membership dues power MOAA's mission. The stronger our paid membership base, the more we can accomplish on behalf of the uniformed services community. It's essential that we cultivate our members to move them through the continuum of membership – from BASIC to PREMIUM to LIFE.

# Maximizing PREMIUM + LIFE Digital Campaigns

## Proven Strategies

- Personalized subject lines
- 4-email cadence
- Email delivery during work week
- Final-day SMS
- Including membership drivers from research

Subject Line:  
Control: <First Name>, your exclusive July 4 savings are here



**CELEBRATE INDEPENDENCE DAY  
WITH A 10% DISCOUNT**

The Military Officers Association of America (MOAA) is celebrating Independence Day with a special offer just for you.

Now through July 4,  
[activate your PREMIUM membership](#) to save 10% and receive a \$10 Amazon gift card\*.



A 1-year membership offers special value, but a 3-year membership gives you even greater savings and all the longer-lasting benefits you deserve.

| 1-year membership + \$10 Amazon gift card | 3-year membership + \$10 Amazon gift card |
|-------------------------------------------|-------------------------------------------|
| <del>\$66</del> \$59.40                   | <del>\$449</del> \$134.10                 |

Use Promo Code: JULYUPGRADE26 to save 10%

**UPGRADE NOW**

Respectfully,  
  
Lt. Gen. Brian T. Kelly, USAF (Ret)  
President and CEO

\*Restrictions apply. See [amazon.com/moaa](#).  
Gift cards will be attached in approximately 3-4 weeks.

Military Officers Association of America  
201 N. Washington Street  
Alexandria, Virginia 22314  
Phone: (800) 254-6622  
[Join/Upgrade](#) [Manage Preferences](#)



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moaa.org  
Join now. Get a 10% discount on your PREMIUM Membership.

**Cost of PREMIUM:**  
\$1,188 over 18 years

**Rate Increases:**  
Possibly

**Spouse Continuation:**  
Additional cost

**Cost of LIFE:**  
\$728 one-time

**Rate Increases:**  
Never

**Spouse Continuation:**  
Included



# Paid Membership Chapter Take-aways

- **Reasons for PREMIUM**

- Personalized discounts tailored for the uniformed services community
- Updates & analysis on key legislation and policies affecting your earned benefits
- Volunteer & leadership opportunities positively impacting the uniformed services community
- Expert guidance & resources mean you'll never have to navigate your earned benefits on your own

- **Reasons for LIFE**

- Access to over 200 private clubs worldwide with an invitation to join the Army and Navy Club of Washington, D.C., at reduced initiation fee
- Peace of mind knowing your membership is transferred to your spouse with continued support and guidance
- Savings on member dues versus renewing annually versus never
- Elevated access to MOAA staff experts

## **Amplify MOAA's Digital Campaigns**

Chapters can boost engagement by re-sharing MOAA's organic campaign posts on your own social channels.

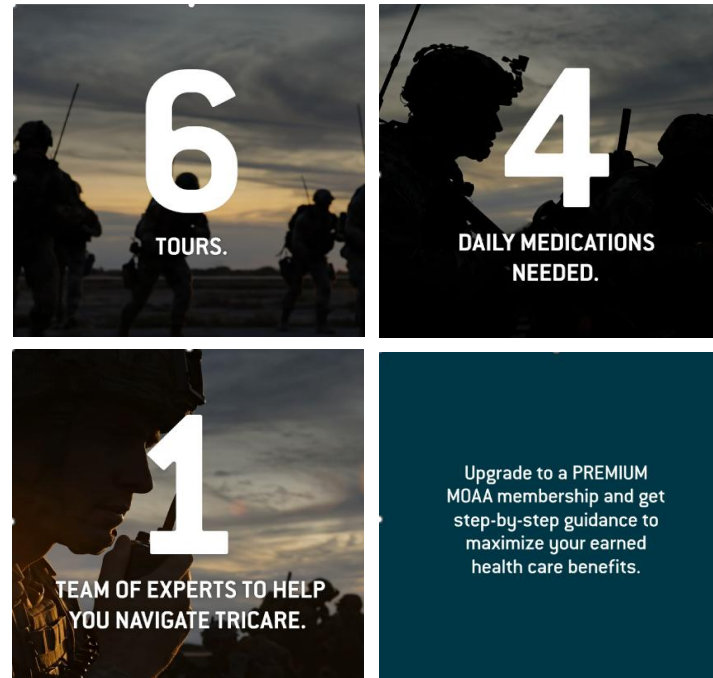
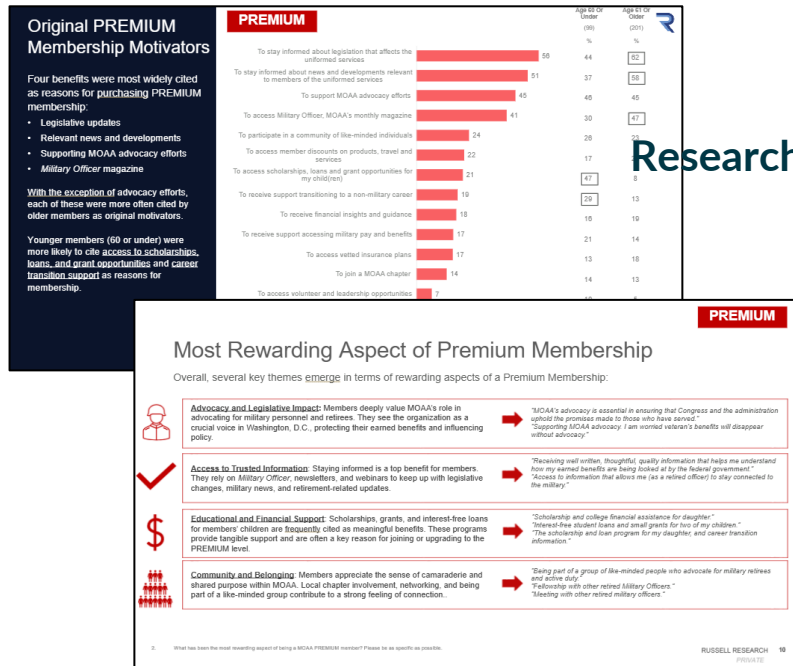


# Understanding the Needs of Current & Prospective Members

Knowing the expectations and needs of current and prospective members is essential in order to deliver relevant messaging that resonates and drives membership – and these needs and expectations are everchanging.

# Grounded in Research: PREMIUM Ad Campaign

- 8 motivators identified through BASIC/PREMIUM member research
- Digital test campaign revealed the strongest 4 motivators
- New creative showing strong results



# Personas: What Does Dillon Value and Need?

## DILLON

25-39 | family formation + mobility | digital-native + value-sensitive

**~63%**

married

**~40%**

married with kids under 18

Core mindset

**"Help me make military life, family decisions, career growth, and finances easier right now."**

### MOAA-READY HOOKS

#### Pocketbook advocacy

BAH, housing, healthcare, pay raises, spouse employment, family readiness

#### Fast utility

Checklists, explainers, benefit updates, resources to share with unit/family

#### Career momentum

Leadership effectiveness, promotion runway, pre-transition planning

#### Credibility cues

Peer proof, testimonials, specifics, clear value exchange



# Personas: What Does Drew Value and Need?

## DREW

40-50 | more established households | planning orientation

**~72%**

married

**~20%**

divorced over-index

### Core mindset

"Help me protect what I have earned and make confident decisions as I transition into the next chapter."

### MOAA-READY HOOKS

#### Protect what I have earned

Retirement, healthcare, pay/benefits protection, policy risk

#### Transition runway

Career transition resources, job-search readiness, financial planning

#### Expert clarity

Authority, proof, outcomes, and structured guidance

#### Membership mindset

Higher affinity for VIP/members-only value and organizational leadership



# Understanding Needs Chapter Take-aways

- Tailor messaging by life stage
- Personalize conversations
- Use MOAA member personas
- Leverage research from MOAA national
- Share insights with fellow chapter members

|                                                                                                                                                                                                    |                                                                                                                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p><b>Personalized Discounts</b><br/>tailored for the uniformed services community</p>                         |  <p><b>Updates &amp; Analysis</b><br/>on key legislation and policies affecting your earned benefits</p>               |
|  <p><b>Volunteer and Leadership</b><br/>opportunities positively impacting the uniformed services community</p> |  <p><b>Expert Guidance &amp; Resources</b><br/>mean you'll never have to navigate your earned benefits on your own</p> |

# Enhancing Member Value

MOAA's value proposition plays a key role in a person's decision to join or upgrade and should:

- Appeal to a wide audience with diverse needs
- Differentiate between membership categories easily demonstrating stronger value for paid categories

# Member Value Via Affinity Partnerships



## Veterans Healthcare

Medicare Advantage  
Available to all members



## Benefits Hub

Available to PREMIUM & LIFE  
members

**COMING SOON!**

## MOAA Store

Available to all members

**COMING SOON!**



## Wealth Management

Available to all members

## Authentically American

Available to all members



## AMU

Available to all members

**[WWW.MOAA.ORG/DISCOUNTS](http://WWW.MOAA.ORG/DISCOUNTS)**



# Enhancing Member Value Chapter Take-aways

- Stay up to date by visiting the “Exclusive Discounts” section of moaa.org
- Watch *The MOAA Newsletter* for announcements of new partnerships
- Remind your chapter members of the many resources that are available

## Chapter benefits to affinity partnerships

- Earn revenue for advertising MOAA Insurance and MOAA Vacations.
  - \$100 annually
  - Must meet advertising requirements and deadlines.
- Earn royalties based on chapter member travel
- Learn more: (<https://www.moaa.org/content/chapters-and-councils/chapters-and-councils/council-and-chapter-administration/>)

# MOAA Resources

**Kathy Partain, CAE**  
Vice President  
Membership & Marketing

[kathyp@moaa.org](mailto:kathyp@moaa.org)

**Elizabeth Limarzi, CAE**  
Senior Director  
Membership & Marketing

[elizabethl@moaa.org](mailto:elizabethl@moaa.org)

