ACC Roundtable: MOAA Charities

October 29, 2026

Program Updates

- MOAA Store Reopened
  - Working solution for ROTC Medal, certs and presentation folders
- Total Force Plus Conference
  - February 1-3 Gaylord National Harbor, MD
  - Free to MOAA members and active duty

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Program Updates

- Affiliate Mentorship Program Active
  - Affiliate leader matched with senior colleagues for:
    - New officer leadership responsibilities
    - Prospective member list recruiting
    - Website and newsletter development
    - Succession planning, etc..
    - https://moaamentorship.cheddarup.com

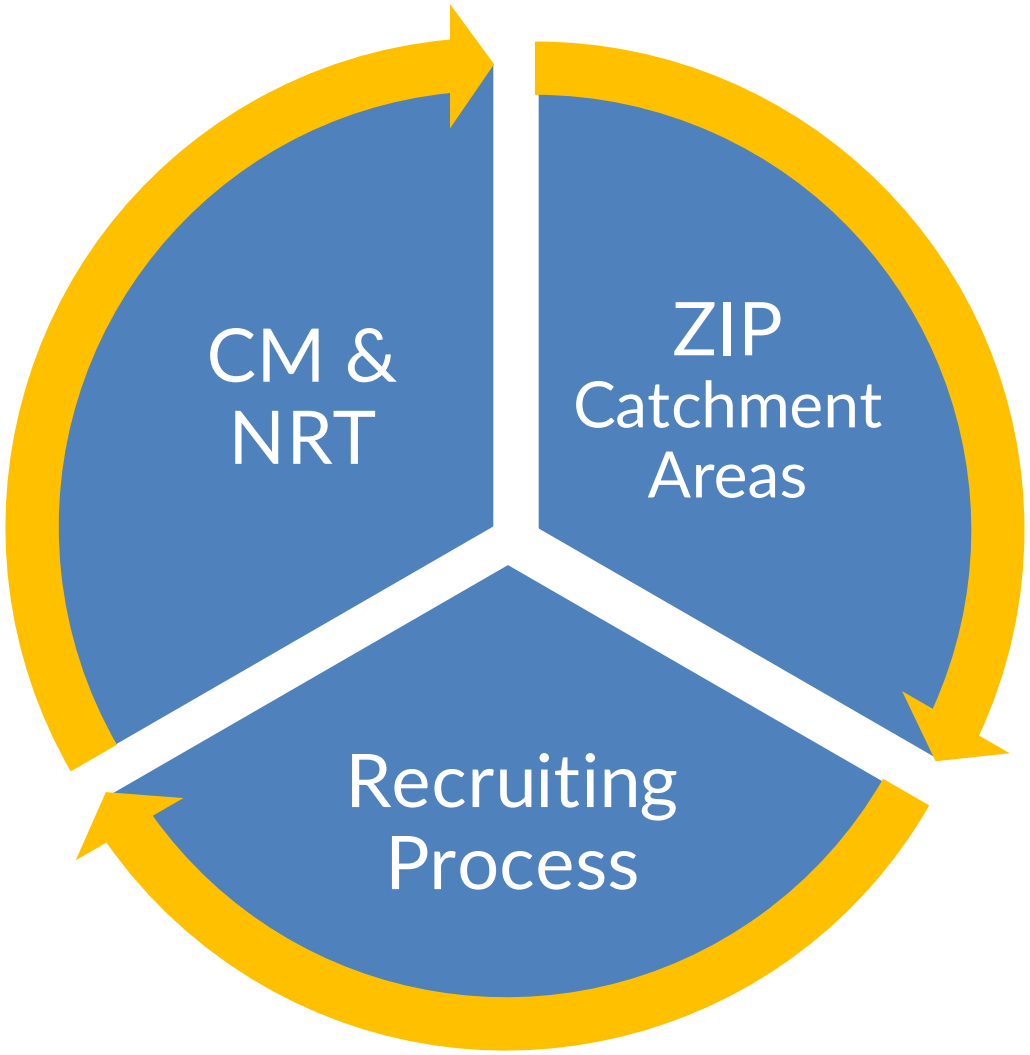
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Program Updates

- Developing National Common Administrative Tools for Affiliates
  - Basic webpage development
  - Data transport and storage applications
  - Mass emailing applications
- MOAA Annual Awards Portal Opens 1 Dec
  - Levels of Excellence Awards
  - Col. Marvin J. Harris Communications Awards
  - Col. Steve Strobridge Legislative Chair/Liaison Award
  - Surviving Spouse Liaison Excellence Award

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Optimizing Membership Growth



- **Recruiting Process**
  - Planning
  - Execution
  - Lessons Learned
- **Chapter Module / NRT**
  - Commitment
  - Training / Proficiency
  - Upkeep
- **ZIP Code Catchment Areas**
  - Council / ICP Presidents
  - Baseline
  - Maintenance

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MOAA Charities Round Table

October 29, 2026

MOAA® Military Officers Association of America

MOAA® CHARITIES

Agenda

- **MOAA Charities Programs**
  - *Professional Development*
  - *Financial & Benefits Education*
  - *Education Assistance*
  - *Crisis Relief*
  - *Community Outreach*

- **MOAA Charities Fundraising**
  - *How are Programs Funded?*
  - *Fundraising Campaigns and Events*
  - *Coming in 2027: New Giving Societies*
  - *Ways to Give*

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MOAA Charities Programs

Professional Development

- programs provide career-transition guidance, spouse and family education, and practical resources that equip servicemembers, veterans, military spouses, and families for success during and beyond their time in uniform

Financial & Benefits Education

- provides expert analysis, personalized resources, and timely updates that help servicemembers, veterans, and their families make informed decisions about their finances, benefits, and long-term security

To view upcoming programs and events, visit www.moaa.org/events.

Education Assistance

- provides scholarships, grants, and interest-free loans that help children of uniformed servicemembers pursue higher education and/or vocational training

Crisis Relief

- provides immediate, compassionate financial assistance to members of the uniformed services community facing unexpected hardship or emergencies

Community Outreach

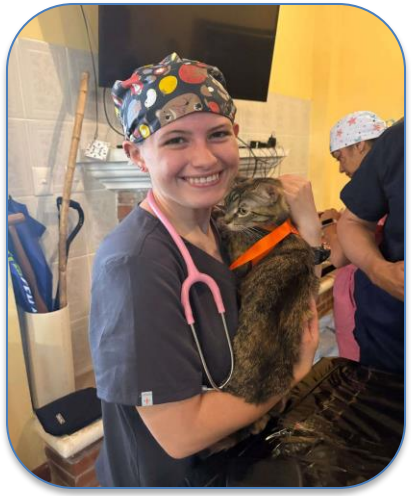
- provides grants and resources that empower MOAA councils and chapters to deliver high-impact, locally focused support to uniformed services families nationwide

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Education Assistance Program

The MOAA Charities Education Assistance Program offers financial support to children of uniformed services families pursuing undergraduate education. Funding packages include a combination of interest-free loans, grants, and scholarships, which are renewable for up to five years or until students complete their undergraduate degrees.







Visit www.moaa.org/education to learn more and submit an application.

Eligibility Requirements

- Under 24 years of age
- Have a parent who is a military officer OR retired/active-duty enlisted personnel.
- Children of former enlisted are not eligible.
- Have a high school GPA of 3.0 or higher **OR** have college cumulative GPA of 2.5 or higher.

Application Process

- Applications are accepted each year from November 1 to March 1.
- Finalists are notified in May and required to submit additional documentation.
- Funds are disbursed in August.

Renewal Process

To remain eligible for funding, renewing students must;

- maintain a min. 2.0 GPA
- remain a fulltime enrolled student
- and complete the renewal application process.

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Crisis Relief Program

Our mission: provide critical support to the greater military and uniformed services community across the country who are experiencing financial setbacks due to unexpected crises at no fault of their own.



Who we help:

- Veterans
- Currently serving and spouses
- Surviving spouses
- Military and veteran caregivers

(Open to all ranks and U.S. uniformed services)

What we help with:

- Housing (rent, mortgage, housing assistance, repairs, groceries, etc.)
- Auto loan/lease/car repair
- Utilities (electric, water, heat, internet/cable, cellphone)
- Bills, including credit card, medical, and insurance



Our impact:

- Awarded close to $1.8M in grants to over 1600 individuals and families

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Crisis Relief Program

Three distinct features set the Crisis Relief Program apart from similar relief programs:

1. A streamlined application that takes less than 20 minutes to complete.
2. Funds reaching the bank account of approved applicants within a week of approval.
3. No requirements for a VA disability rating to be eligible, bridging the gap for the 12 million veterans without a disability rating.



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Crisis Relief Program



Statistics for 2026 YTD

Total number of applications: 810

Total approved: 578

Total awarded: $787,000

Service breakdown: 355 USA; 79 USAF; 85 USN; 54 USMC; 1 USPHS; 4 USCG

Average income: $53,784

FEMA declared disasters: 11

Award breakdown: 8% (<$1000); 78% ($1000-$1999); 9% ($2000-$2999); 5% (>$3000)

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Community Outreach Grant Program

- Program developed in 2017
- Offers funds to MOAA councils and chapters providing assistance to members of the uniformed services and their families within their local communities in one or more areas of critical need:
  - *Housing*
  - *Food assistance*
  - *Employment*
  - *Health and behavioral health*
  - *Family support*
  - *Community reintegration*
  - *Financial assistance*
  - *Legal assistance*
  - *Transportation*
  - *Crisis Relief*



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Community Outreach Grant: Program Timeline

- **Maximum grant amount:** $5,000
- **Grant cycle:** May 1 to April 30 of the following year
- **Grant application period:** Dec. 1 to Feb. 28, annually
- **Grant scoring:** Early March (members of MOAA board)
- **Grantees approved/announced:** MOAA's annual Spring Board Meeting
  - Will be contacted by email regarding grant status in May
  - Memorandum of Understanding (MOU)
- **Funds available for disbursement**: May
  - Funds will be initiated to your Council/Chapter bank account once the MOU is signed and submitted in your applicant portal
  - This process can take anywhere between 5-10 business days depending on document submission date from your Council or Chapter
- **Final Reports**
  - There is no longer a mid-cycle report due in December
  - Final Report due May 31
  - MOAA Charities may ask for additional reports throughout the current grant cycle

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Community Outreach Grant: Application Process

- **Application window opens on December 1 and closes on February 28**
  - Applications are submitted on the Survey Monkey platform
  - 2027 Community Outreach Grant Application will be available on the link below starting December 1 https://moaacharities.smapply.us/prog/

- You must **create a new account** to **start your application**
  - If you have submitted an application before, you will login to your existing Survey Monkey Apply account
  - Once you begin the application you will see tasks that must be completed before you submit the application
  - You will see any outstanding tasks associated with the application and will receive an email reminder if those tasks aren't finished by the deadline
  - Will receive email confirmation once application is submitted

- **4 main questions will be scored** by our judges, 25 points each, total of 100 possible points
  - Other sections of the application will still be reviewed
  - Clear, specific, understandable, complete
  - Ensure each question/prompt has been thoroughly answered before clicking "Submit"
  - You may return to edit your application at any point before the application window closes

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Community Outreach Grant:
Application Resources

Grant Criteria Information

PDF overview of the grant's eligibility, application process, and other resources

Application Worksheet

PDF copy of the ENTIRE application

Application Webinar and Slides

Recording and slides of a recent presentation providing an overview of the Community Outreach Grant program

Grant Fund Usage Report

PDF copy of the final report



Links will be updated for the program year closer to when the application window opens.
https://charities.moaa.org/the-moaa-foundation/cog/

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How to Apply for the Community Outreach Grant



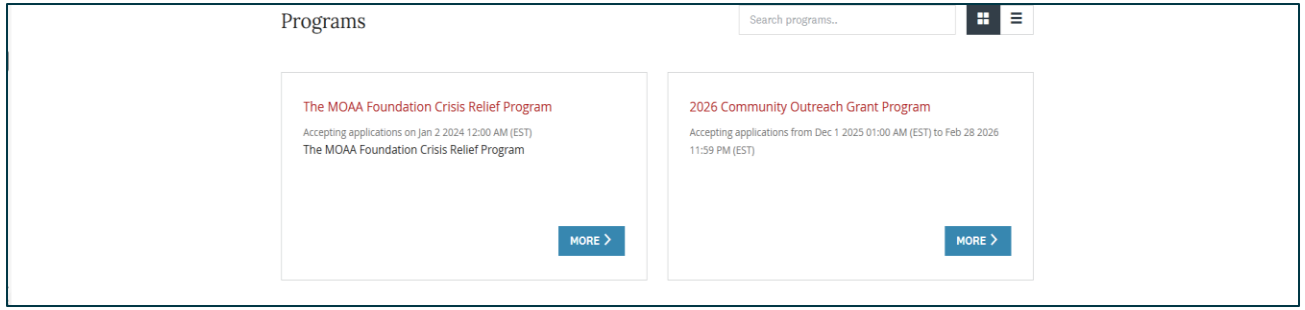
To apply, use the MOAA Charities website and select "**Click here**," or use the direct link below:

https://moaacharities.smapply.us/prog/



Once on the Survey Monkey Apply dashboard, you will be given a welcome screen that provides a brief overview of the MOAA Charities Programs with the additional option to toggle through the tabs at the top for even more program information.

Scroll to the bottom of the page, review the available programs, and **select "MORE"** for the program you want to apply to.

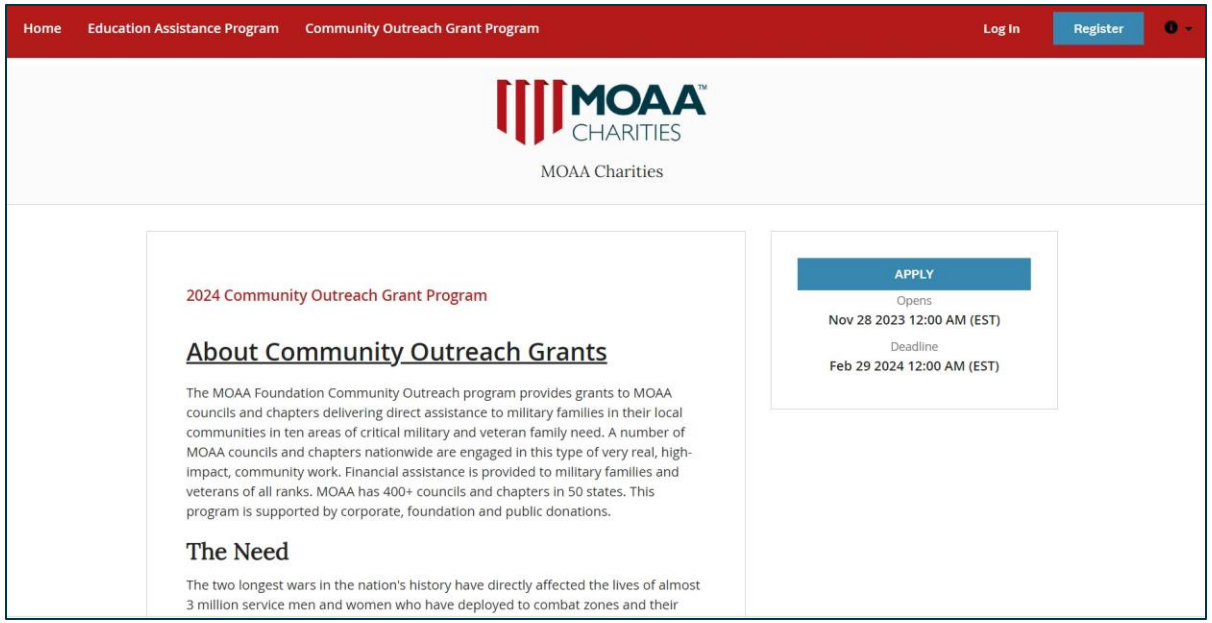


Please note: Education Assistance Program applications and the Community Outreach Grant Program application will appear only during their respective application windows.

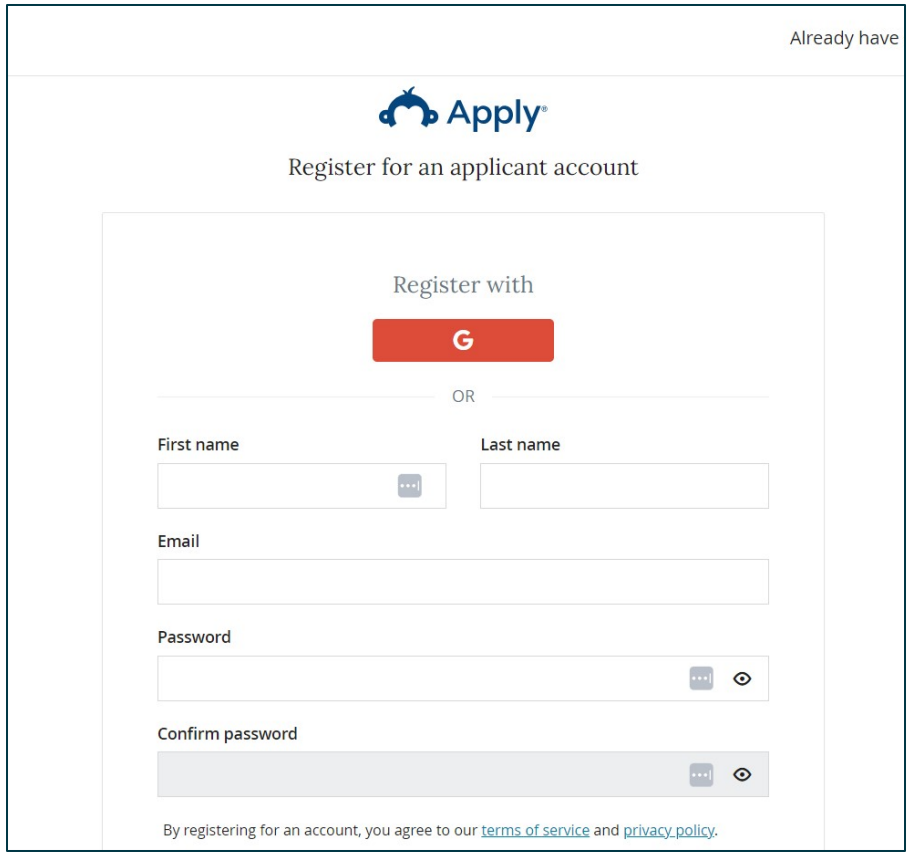
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How to Apply for the Community Outreach Grant



Select "Apply" to begin your application.



Next, you will be prompted to **login** or **create an account** through Survey Monkey Apply.

If you have an existing account but do not remember your login credentials, please contact Survey Monkey Apply for assistance.

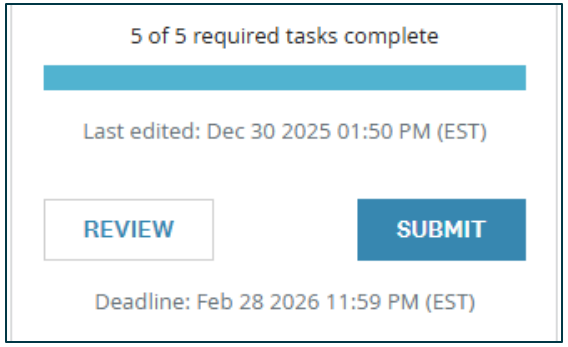
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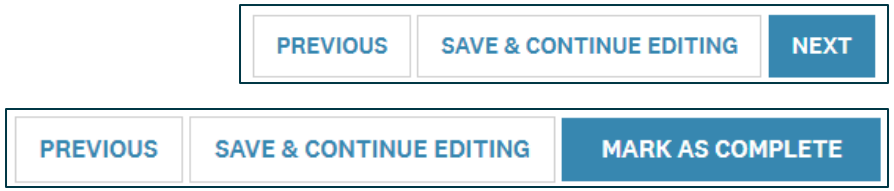
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Community Outreach Grant: Best Practices

- Name Your Application
  - Be consistent year after year
  - Ex: *"Chapter Name_Program Name_Year"*

- Once an account is created, save your work!
  - You can complete your application in one sitting or save and return later to complete
  - When done with a task select '**mark as complete**' and always **SUBMIT** when **done**





Community Outreach Grant: Best Practices

- Communicate with your Council/Chapter member who is submitting the application(s)
  - Clarify who is responsible for submitting specific program applications whether it be for one program or multiple programs. Avoid submitting duplicate applications for the same program

- Use an external platform to write and work on your application
  - Google Drive or Microsoft Word
    - Easy to share with other contributors
    - Provides word and character/word count
    - Protects your work!

- If you are working with an organization who wishes to apply on your behalf, you must be aware that they are making this submission and are directly involved in this process
  - Will not accept passthroughs
  - *This is essentially taking the grant funds and just giving them to an organization or program to use*
  - You must have direct involvement with the program you are applying for, and be directly involved in how the funds are being spent

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Community Outreach Grant:
Photo Submission Examples







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Helpful Links and Resources

Questions?

- Contact the Member Service Center at (800)234-6622
- Email MOAA Charities at charities@moaa.org

Helpful Links

- MOAA Charities: https://charities.moaa.org/
- Survey Monkey Apply: https://moaacharities.smapply.us/
  - *use this link to apply for any of our programs*

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How Are the Programs Funded?

Individual Giving

One-time and recurring gifts, **planned gifts**, and *gifts of securities.*

Corporate Support

Corporate sponsors help sustain charitable programs and impact.

Signature Events

MOAA Charities Golf Classic and Roast & Toast at the TotalForce+ Conference.

Programs are made possible through a mix of individual generosity, corporate support, and MOAA resources.

Upcoming Fundraising Campaigns

End-of-Year Campaign

DEC 1–31

Purpose

Drive a year-end surge in tax-deductible charitable gifts to the MOAA Charities before Dec 31 deadline.

Focus Areas

Year-End Email Series: Urgent, deadline-driven messaging highlighting tax-deductibility and donor impact.

Holiday Messaging: Gratitude-themed content tying seasonal giving to military family support.

Web and Pop-Ups: Homepage placements with simplified giving options through Dec 31.

Recurring Gift Push: Donor thank-you and early-year stewardship outreach

Recurring Gift Push: Early January thank-you campaign to retain and re-engage donors.

Key Message

Your Year-End Gift = Real Impact

MOAA Impact Guide

DEC 2026

Purpose

Showcase the measurable impact of donor contributions to the programs under the MOAA Charities through a professionally published annual guide.

Focus Areas

Military Officer Magazine: Inserted in December issue (print & digital)

Audience: All MOAA members, prospective donors & supporters

Timing: Early December to inspire year-end giving decisions

Key Messages

Your Gift at Work: See how 2025 support changed lives

Trust, Transparency & Impact: Measurable outcomes in education, relief & transition support

You Make the Mission Possible: Foundation for 2026 success

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MOAA Charities 23rd Annual Golf Classic



Learn more at https://charities.moaa.org/events2/UpcomingEvents/

Reach out to Jeff Angers, jeffa@moaa.org, if you are interested in golfing or have an interested sponsor.

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Roast & Toast with Rob Riggle



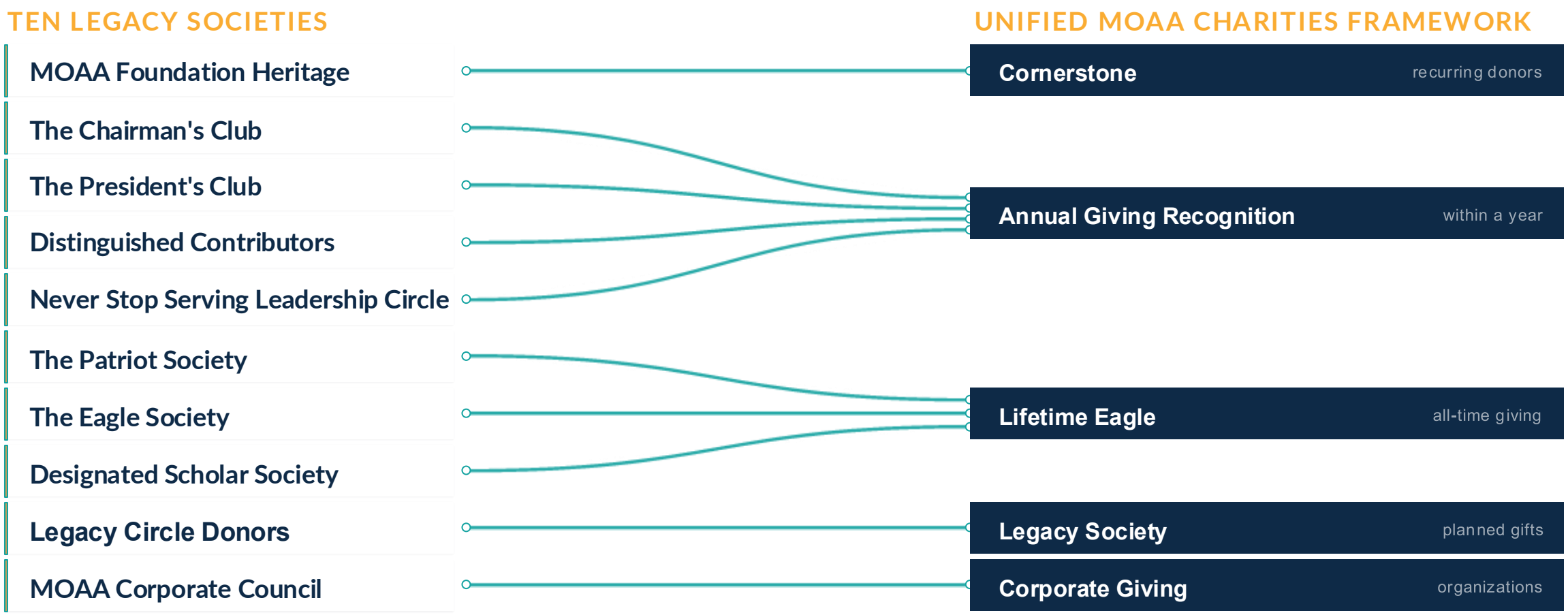
- Entertaining evening at ***TotalForce+*** celebrating service, tradition, and camaraderie
- Hosted by Rob Riggle, featuring a lighthearted roast of the Army
- Representatives from each service sharing good-natured remarks, with an Army rebuttal
- Proceeds supporting MOAA Charities Crisis Relief Program
- Free admission for currently serving military and government employees and their spouses
- Includes beverages and buffet dinner

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Tuesday, 2 Feb 27, 6:00 pm – 10:00 pm
Harbor Social at Gaylord National

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Coming in 2027: *New Giving Societies*



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Ten societies across two legacy charities become five.

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Ways to Give

- **Credit/Debit Card Online.** Donate at https://moaadonate.funraise.org/.
- **Credit/Debit Card by Mail.** Complete form at https://charities.moaa.org/uploadedfiles/moaa-charities/documents/pdf-forms/2026-moaa-charities-donation-form.pdf and mail to:

  MOAA Charities
  ATTN: Finance
  201 N. Washington St.
  Alexandria, VA 22314

- **Check by Mail.** Make checks payable to *MOAA Charities* and mail to:

  MOAA Charities
  P.O. Box 1824
  Merrifield, VA 22116-9917

- **Recurring Donations.**
- Combined Federal Campaign (CFC) ?
- **Securities / Assets.**
- **Giving Societies.**
- **Donor Advised Funds.**
- **Bequests / Planned Giving**

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Questions?

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Appendix: Backup Slides





Frequently Asked Questions

How can I reset my password?

- Located on the application website log-in screen
- Survey Monkey will help with login issues --Use the chat feature on the application page.

Can a Council/Chapter submit more than 1 application?

Yes, so long as they are working with more than 1 program or organization and applying for separate grants for each.

Do chapters need to have general liability insurance before applying for a grant?

No. However, we highly recommend the grantee have in place a general liability insurance policy that will remain active until all grant funds have been used. The chapter will be liable for any and all incidents, regardless of insurance status.

What is the purpose of an IRS 990 form?

This is the nonprofit form for Council/Chapter OR the program they are applying on behalf of.

How can a chapter receive the highest score?

There is no exact science to this process. Chapters should ensure that a complete and understandable application is submitted, including all the requested points of information and documents.

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Frequently Asked Questions

Who scores the applications?

The scoring committee is made up of judges from the MOAA Charities Board, the MOAA Board and in some instances MOAA staff.

When do applications open?

Applications open on December 1 and close on February 28.

What is the most a chapter can receive?

The MOAA Charities awards grants up to $5,000 to MOAA Councils/Chapters.

How do I submit my chapter's mid-cycle and final reports?

Chapters are only required to submit a final report. All final reports are to be submitted via SurveyMonkey. The task will open in December and will close the following April. Our team does not accept emailed in reports.

How can my application receive the highest score?

There is no exact science to this process. Ensure that a complete and understandable application is submitted, including all the requested points of information and documents.

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What is Planned Giving?

- Thoughtful way to include charitable support as part of your:
  - *Estate plan;*
  - *Retirement planning; and*
  - *Long-term financial goals.*
- Planned giving is often misunderstood as something complicated or only for large estates/wealthy donors — it's neither.
- Many planned gifts cost nothing today and can be updated as circumstances change.
- At its core, planned giving is about *intentional planning, long-term impact; and aligning personal values with future legacy.*
- Allows you to make a future gift — or a gift that provides income or tax benefits during your lifetime — while still meeting your personal, family, and philanthropic goals.

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Planned Giving: What is It and Why Do People Choose It?

At its core, planned giving is about intentional planning, long-term impact, and aligning personal values with future legacy.

Benefits to the Donor

- Flexibility and control.
- Potential tax advantages.
- Income options (in some cases).
- Peace of mind.
- A lasting legacy.

Benefits to the Beneficiary

(Family and Loved Ones)

- Clear intentions.
- Reduced estate complexity.
- Potential tax efficiencies.
- Income and financial security.

Many planned gifts are created by simply updating a will or beneficiary form.

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Common Types of Planned Giving

- Bequests through a will or trust.
  - *Name MOAA Charities in your will or trust.*
  - *Can be a dollar amount, percentage, or remainder.*
  - *Easy to update.*
  - *No impact on finances today.*
- Beneficiary designations (IRA, insurance)
  - *Retirement accounts.*
  - *Life insurance.*
  - *Investment accounts.*
  - *Simple to complete.*
  - *Tax-efficient.*
  - *Flexible.*

The most common option is simply naming MOAA Charities in a will or beneficiary form.

It's a great way to start!

- Charitable Gift Annuities (CGAs)
  - *Provides beneficiary a fixed income for life.*
- Charitable Remainder Trusts (CRTs)
  - *Provides variable or trust-based income.*

These options are more structured and usually involve professional advisors

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Coming in 2027: New Giving Societies

What is Changing and Why

MOAA's two charities — the MOAA Scholarship Fund and The MOAA Foundation — have merged into a single entity, **MOAA Charities** . Donor recognition has followed suit: we are consolidating **ten societies into five** to streamline the stewardship experience — one consistent framework, built to deepen stewardship.

WHERE THINGS STAND

The framework, the five societies, and their tiers and thresholds are approved. Build is underway — systems, messaging, and reporting — ahead of launch.

One merged organization

Replace two separate Scholarship Fund and Foundation structures with a single MOAA Charities framework.

Stronger stewardship

Clear tiers and upgrade paths give every donor a defined recognition home and a reason to grow.

Modern, consistent format

Recognition organized around how and when people give — easy to explain and to administer.

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