



Monthly Leadership Roundtable: Recruiting and Retention

July 24, 2025



Agenda

- Program Updates and Training Opportunities
- National Membership Update: Kathy Partain, Elizabeth Limarzi
- Chapter Recruiting and Retention: Dena Kilgore
- Updated MOAA Privacy Policy Discussion: Jim Carman
- Summer 2025 Advocacy in Action Campaign: Terry Waters
- Discussion
- Closing Remarks

Program Updates

- Committee Module (CM)
 - CM, Near Real Time Report, and Do Not Contact List all up and running. Chapters advised to contact chapters@moaa.org with any issues.
 - Ongoing council and chapter survey on CM/NRT involvement <https://forms.office.com/r/NUyWVSH4gL>
- Chapter Dues Portal (Cheddar Up)
 - 64 chapters are live and 19 in process of integration
 - Requests to chapters@moaa.org

Program Updates

- MOAA Data Privacy Policy Rollout
 - Will provide increased chapter prospective member data
 - Detailed guidance to council and chapter leaders forthcoming
 - Clears the way for virtual pilot programs
 - Detailed discussion to follow
- August 13 Leaders Virtual Workshop (Experienced Leaders)
 - Anyone is welcome
 - Invitations this week

Help Promote TotalForce+ Conference

- A variety of social media tiles are available to download at <https://moaa.photoshelter.com/galleries>:



- Share posts from MOAA's social media channels: <https://www.moaa.org/content/MOAA-social-media/>



2025 Leader Training Workshops



Leadership Seminar
Orlando, FL
January 16-18
FL, Other C&C by
invitation

Virtual Workshop
New Leaders
March 5
Focused on New
Chapter Leaders

Central Workshop
Oklahoma City, OK
May 2-3
AR, CO, IA, KS, LA,
MN, MO, ND, NE,
NM, OK, SD, TX

Virtual Workshop
Experienced Leaders
August 13
Focused on Experienced
Leaders

East Workshop
Hershey, PA
November 14-15
CT, DE, IL, IN, MA, MD,
ME, MI, NH, NJ, NY, OH,
PA, RI, VT, VA, WI, WV



2025 Roundtable Schedule

January 23 Advocacy in Action	February 27 Committee Module/NRT	March 27 Advocacy in Action Logistics	April 24 Chapter Dues Pay Portal
May 29* Chapter Visit and Awards Programs	June 26 General Counsel Issues	July 24 Recruiting and Retention	August 28 MOAA Virtual Chapters
September 25 Council and Chapter Mentorship	Oct 23 MOAA Foundation	November 20* MOAA Annual Awards	December 18* Year in Review/2026 Outlook

7:00 pm EST

*Adjusted from 4th Thursday to Avoid Conflict





National Membership Update

Kathy Partain, CAE

Elizabeth Limarzi, CAE



350,000

Members

Strong

Strength in Numbers

The Breakdown

BASIC – 46.72%

Paid Membership – 53.30%

Average Age

BASIC - 55

PREMIUM - 72

LIFE – 79

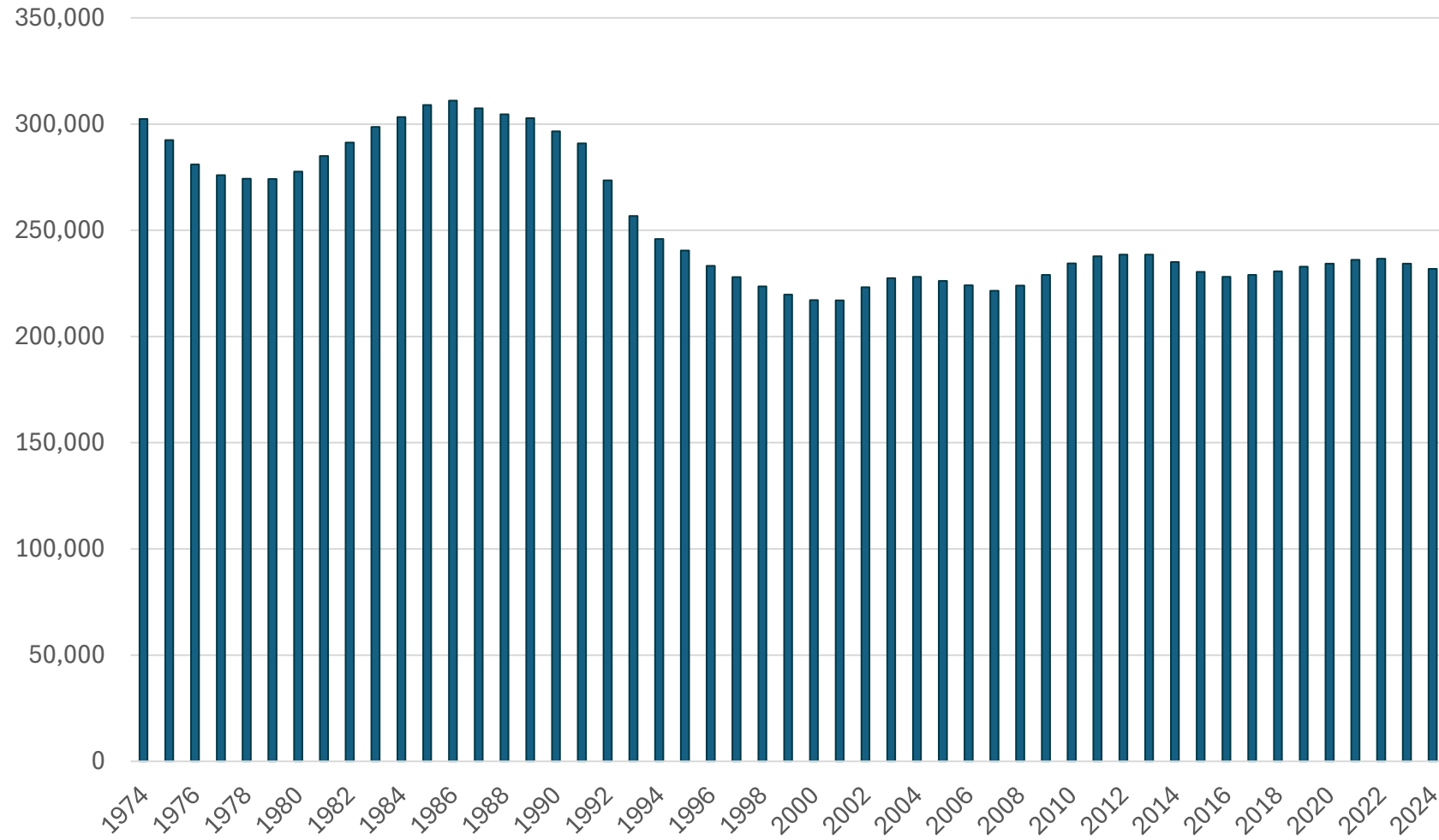
Overall - 67



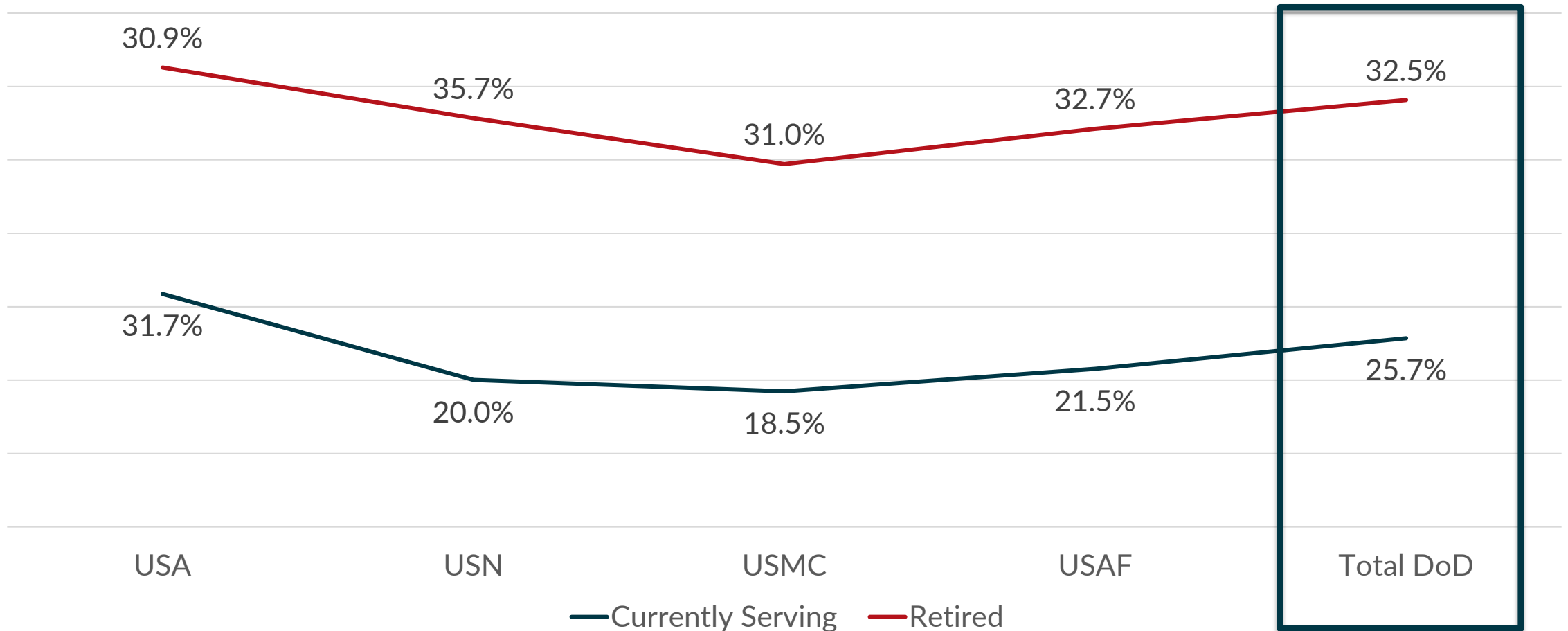
Expanding MOAA's Market Share

As the size of the officer corps fluctuates, MOAA must find ways to increase awareness within the existing population and identify effective engagement and recruitment opportunities.

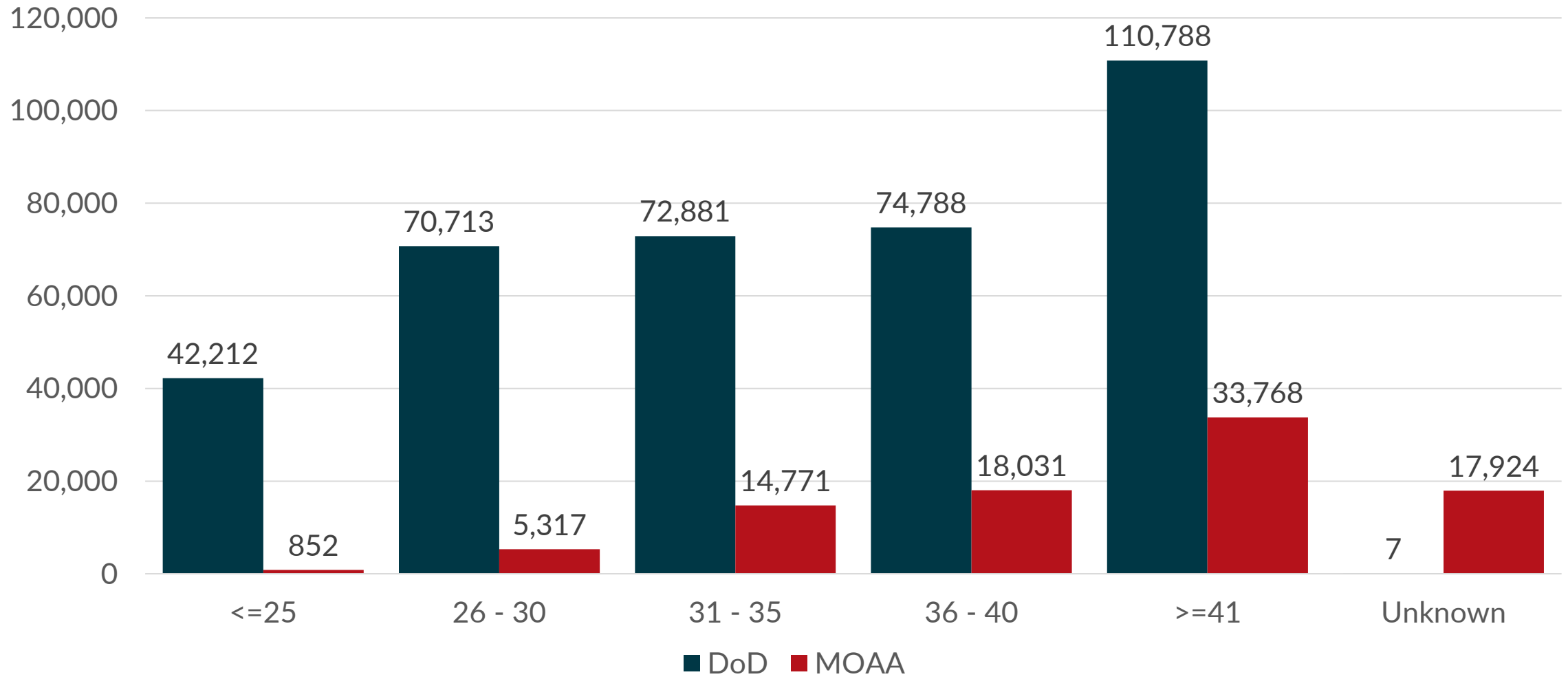
DoD Active-Duty Officers



MOAA's Market Share



Currently Serving by Age Band



MOAA Outreach & Schools & Awards

- Outreach
 - Targeted military conferences nationally
 - Upcoming Events:
 - NHA
 - Tailhook
 - NGAUS
 - AFA Air Space & Cyber
- Schools & Awards
 - Top schools for BASIC member recruitment:
 - WOCS (Ft Novosel, AL)
 - Army OCS (Ft Moore, GA)
 - 90 awards given yearly

Yearly BASICS:
Approx. 2,500

Yearly PREMIUMs:
Approx. 75



Academy Alumni Association Partnerships

- Digital Outreach
 - Targeted digital ads reach current cadets and recent graduates
 - Alumni portal platforms recommend MOAA
- Membership Growth (Opt-Ins)
 - Clear calls-to-action in both ads and event materials
 - Streamlined opt-in process for MOAA BASIC Membership
- Event Presence
 - Strategic participation in academy events (career fairs, commissioning week, etc.)

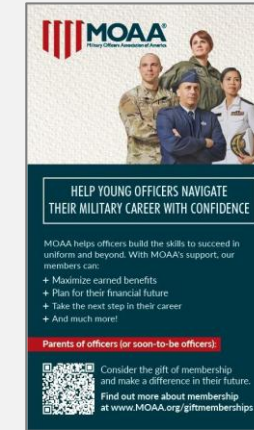


BASIC Membership Advertising

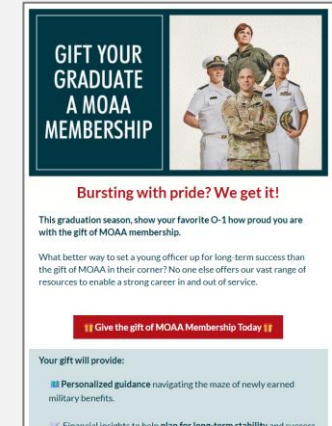
- Maintain core channels to provide efficient targeted reach; providing message frequency Search
 - Website ads
 - Facebook + Instagram
 - LinkedIn
- Focus on new officers/mid-grade officers during key times in market: graduations, WOCS/OCS, athletic events to put MOAA in the forefront when that audience is more likely to be active.
- Utilize larger awareness and impact media to support early prospecting efforts to an audience unfamiliar with MOAA.
 - In-App Mobile Games
 - Match Group

Drivers

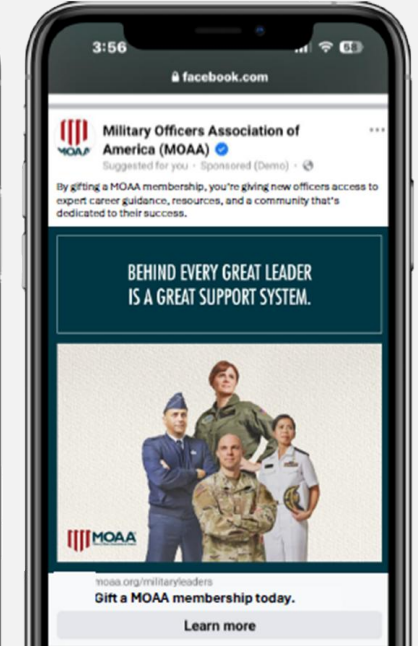
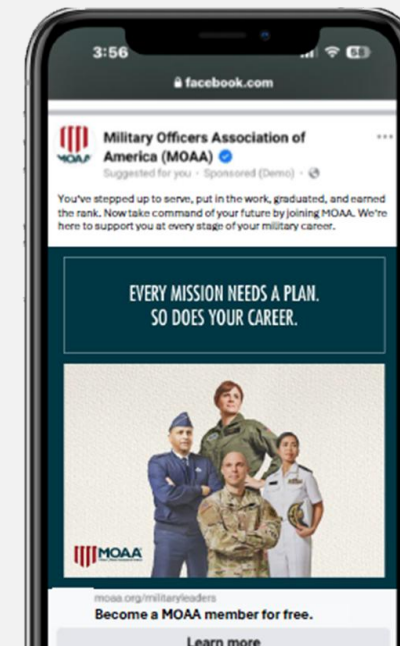
USAFA Parent Membership Guide



Gift Membership Email



META & LinkedIn





CONNECT
COLLABORATE
CREATE CHANGE

JOIN ME + 3,000 OTHERS — OCT. 28-29

TOTALFORCEPLUS.ORG

Membership Opportunities

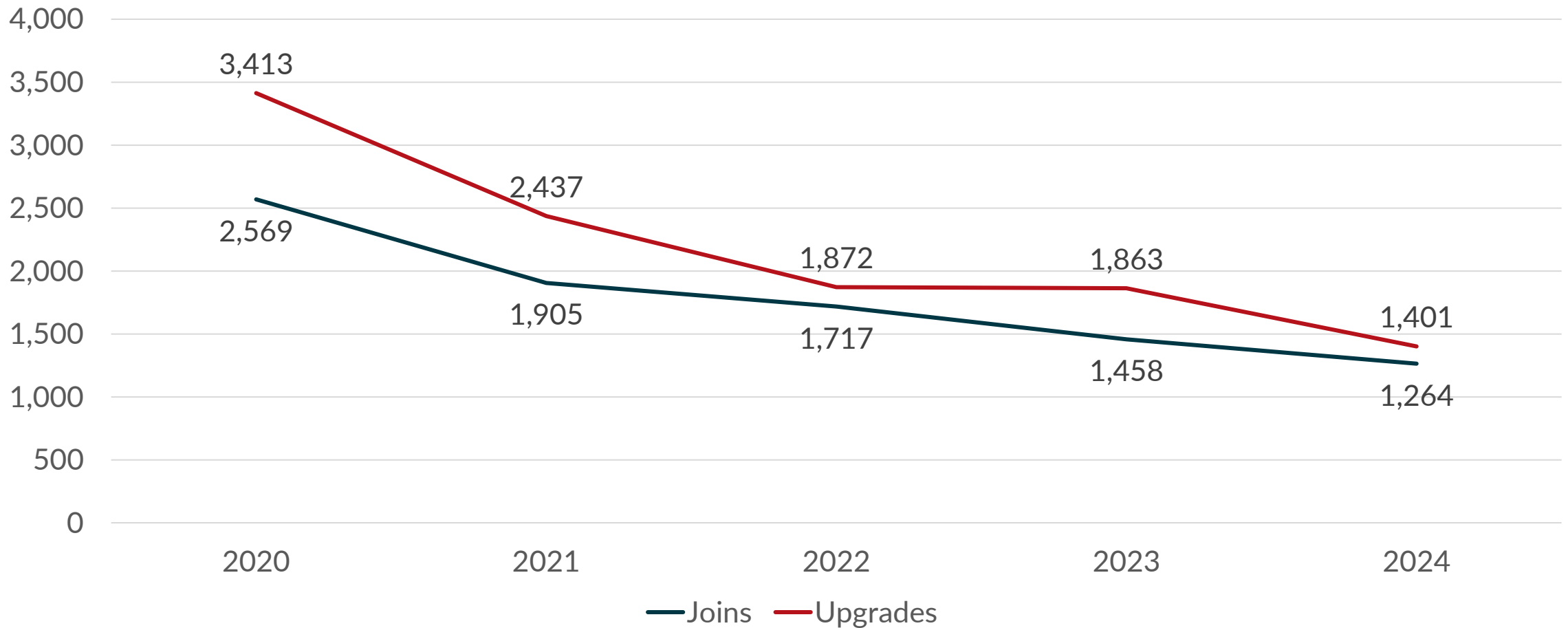
- BASIC membership for all eligible registrants
- MOAA Booth will include opportunities to:
 - Engage with the MOAA brand in fun and unexpected ways
 - Learn more about MOAA's mission and the value of membership
 - Join or upgrade membership
- Ongoing promotion throughout the conference



Paid Membership: Increasing BASIC to PREMIUM Conversions

With the introduction of BASIC membership, MOAA has successfully built a robust list of prospects for paid membership. BASIC members have an awareness of MOAA and have been introduced to the value MOAA provides—making them an ideal audience for recruitment to PREMIUM or LIFE membership.

5-Year PREMIUM Gains Trend



PREMIUM and LIFE Campaigns

- 2025 so far:
 - Digital Campaigns: over 720 responses and close to \$162K in revenue
 - Direct Mail: over 350 responses and over \$30K in revenue
- Upcoming campaigns targeting BASICS and PREMIUMS:
 - September
 - LIFE membership invitation offer
 - October
 - Premium direct mail package
 - November
 - Veterans Day digital campaign
 - PREMIUM direct mail package
 - December
 - End of Year campaign



CELEBRATING NATIONAL
MILITARY
APPRECIATION MONTH

★ ★ ★ ★ ★

MOAA
Military Officers Association of America

[JOIN NOW](#)

**DON'T MISS YOUR
STAR-SPANGLED
SAVINGS!**

59 HOURS
18 MINUTES
12 SECONDS

GET 10% OFF YOUR PREMIUM



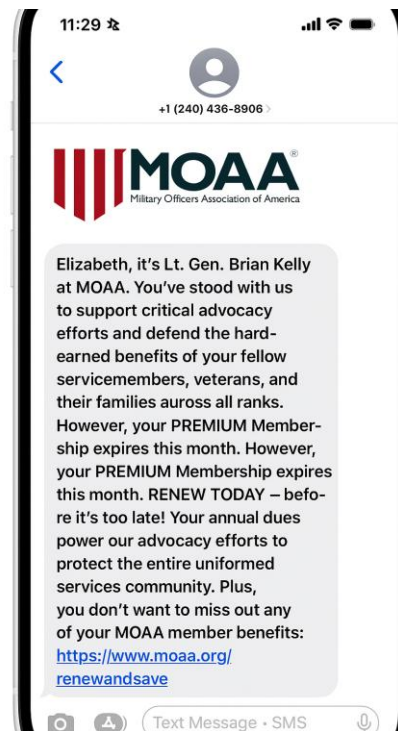
Paid Membership: Retaining PREMIUM Members

It is more cost-effective to keep a current PREMIUM member than to recruit a new one, so we are continually looking for opportunities to make improvements in this area.

Keeping More PREMIUM Members



Pre-recorded calls sent 1st month
of billing



Text reminders in month of
expiration



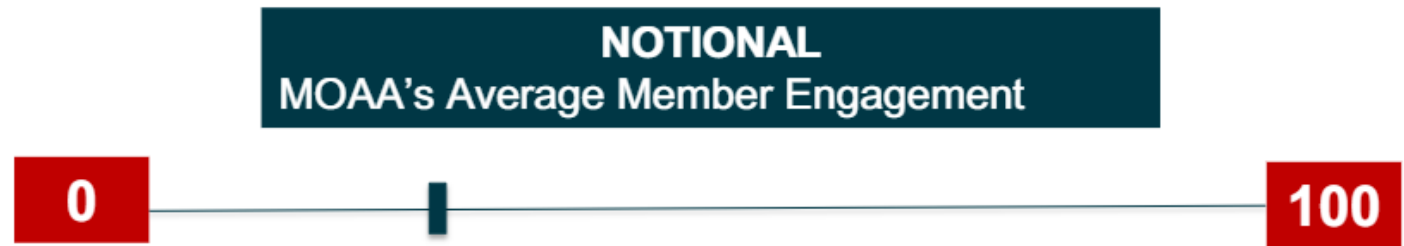
Increasing Member Engagement and Awareness of MOAA's Value Proposition

The more engaged members are in MOAA's programs and services, the more likely they are to retain their membership.

Strengthening MOAA Brand and Reach

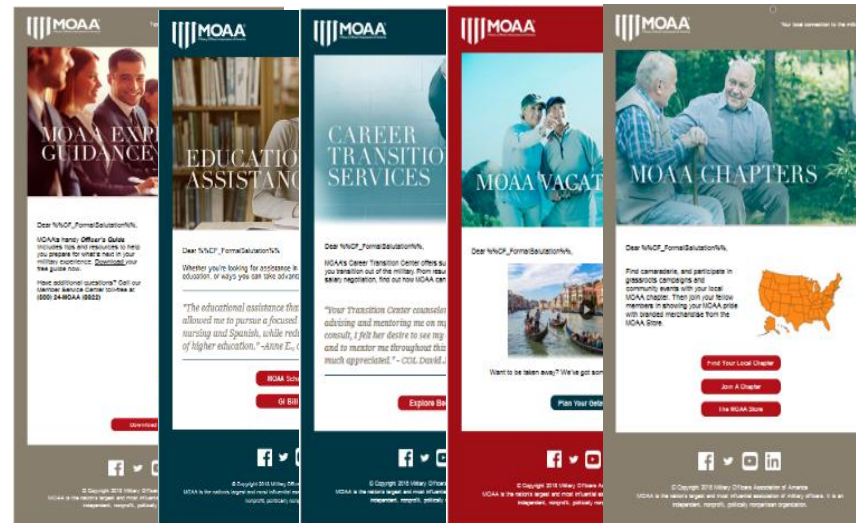
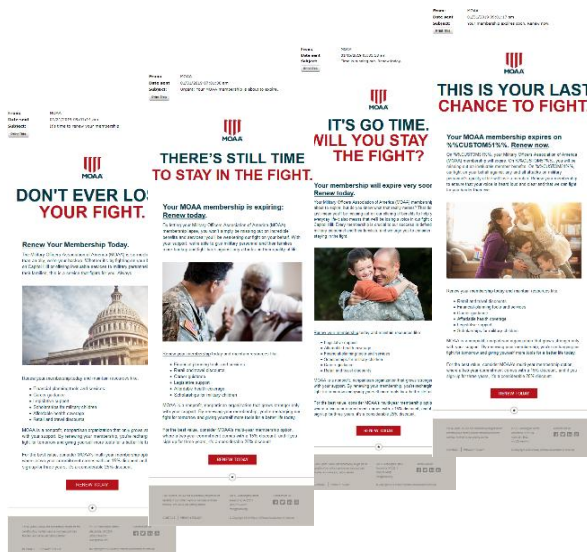
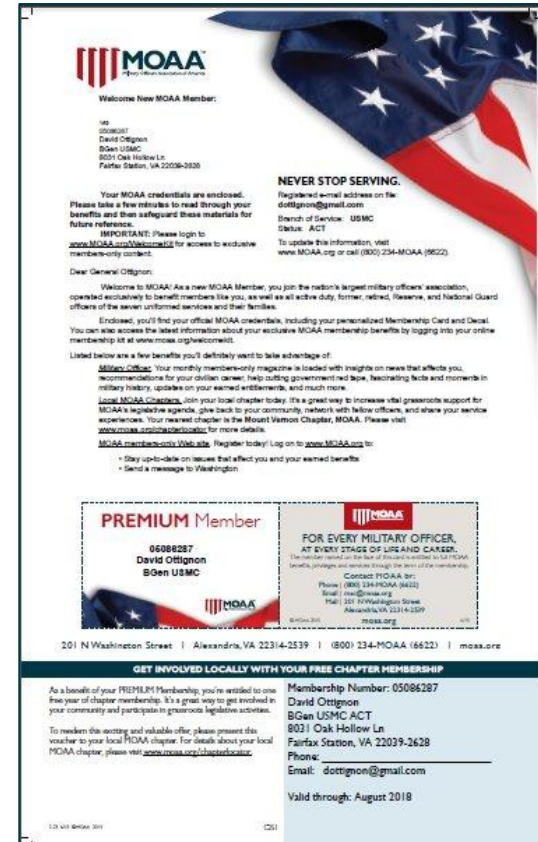
Goals: Increase overall member engagement scores annually and build brand awareness

ENGAGEMENT CATEGORIES
Contact MOAA
Read MOAA Content
Face-to-Face Interactions
Advocacy
Donations
Web
Participation
Membership Level



Member Experiences

- Offer personalized, multi-channel persona experiences
- Raise awareness and drive engagement with relevant member benefits
- Drive toward upgrades/renewals with personal focus



Webinars



- Member value proposition – sound career and life decisions
- Diverse topics across career, financial education, and military/veteran benefits
- Leverage new and existing partnership relationships
- Changed from ON24 to Microsoft Teams Webinar platform
- 2025 Stats (as of June 11)
 - On pace with 2024
 - 7,384 registrants/19 events
- On the horizon: Survivorship webinar in September

Contact Us



Kathy Partain, CAE

Vice President, Membership & Marketing

kathyp@moaa.org



Elizabeth Limarzi, CAE

Senior Director, Marketing

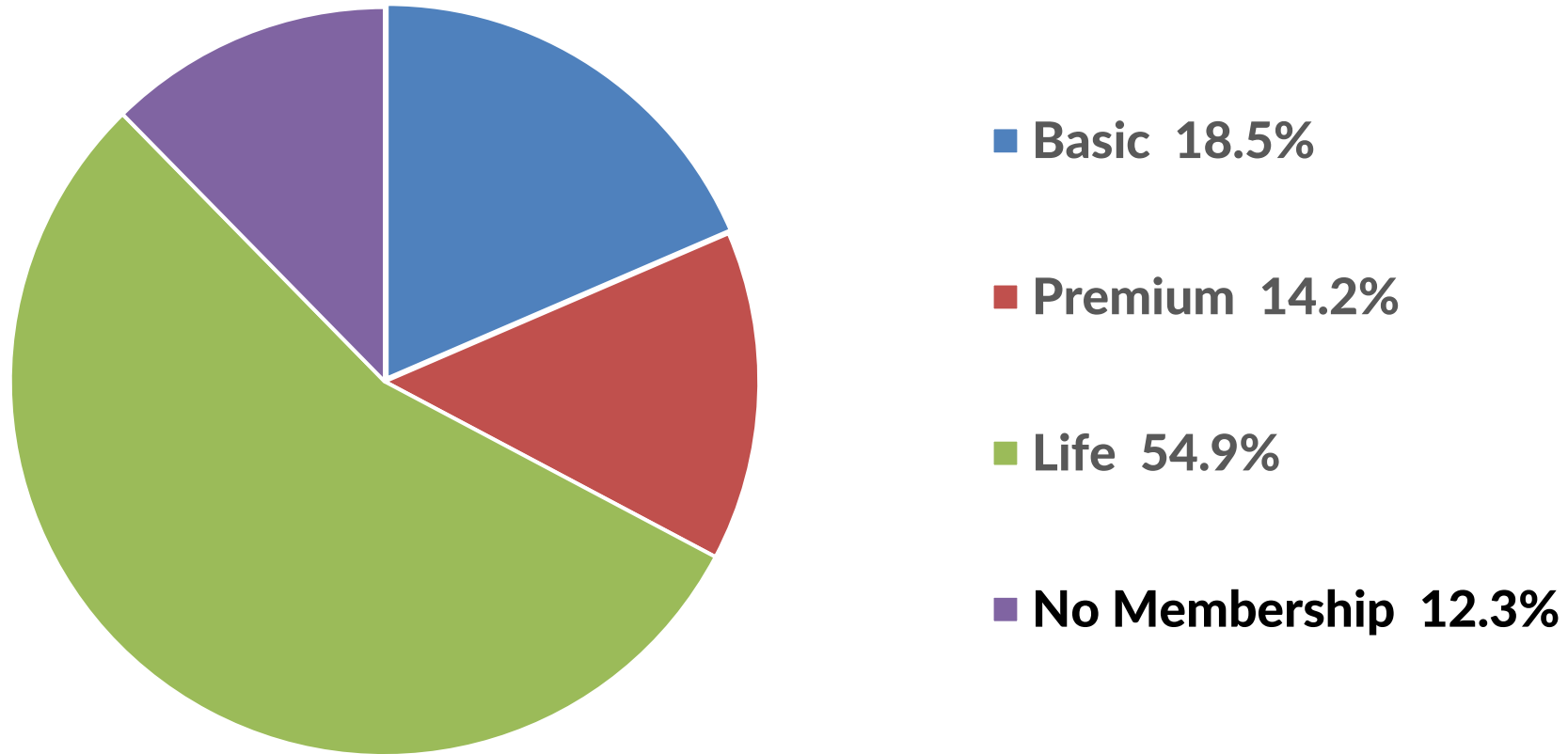
elizabethl@moaa.org

Recruiting and Retention: MOAA Councils & Chapters

Dena Kilgore, CAE



Chapter Membership Demographics



Printable Recruiting Resources

- NEW “Why Join MOAA” one-pager
- Newly revised Recruitment Guide
- MOAA Leaders Resource Manual – Member Personas
- MOAA’s Guide to Basic Membership
- Common Join Form
- Stakeholder Report

Online Recruiting Resources

- Videos – “Never Stop Serving” chapter video, Surviving Spouse video
- Legislative Action Center
- Cheddar Up online dues payment option
- Web presence on MOAA.org
- MOAA Council & Chapter webpages
- Coming soon: new chapter locator on MOAA.org

WHY JOIN?



As champions of the uniformed services community, MOAA is dedicated to protecting your hard-earned benefits while providing the resources, programs, content, and other support to make an active, impactful difference in your life and the lives of your family.

Our identity is defined by getting results on Capitol Hill, and we invite all members to join us in this critical fight. By becoming a dues-paying MOAA member, you will help fuel our ongoing advocacy efforts on your behalf.

For state and local issues, MOAA chapters lead the way. Find camaraderie with a purpose by joining your local chapter. Scan the QR code for more information or reach out to your local chapter.



A LEGACY OF ADVOCACY SUCCESS

Worked to establish TRICARE For Life in 2001 and to defeat multiple enrollment fee proposals since

Championed a historic pay raise for junior enlisted servicemembers in 2024

Celebrated passage of the Dole Act to provide needed support to veterans and caregivers in 2024

Other legislative wins we have played a critical role in accomplishing over the years —further demonstrating why MOAA has been named a Top Lobbyist by *The Hill* 18 years in a row:

- Modernized the GI bill for the 21st century
- Expanded benefits for veterans harmed by burn pits through the PACT Act
- Repealed the SBP-DIC Offset ('Widows' Tax')
- Enhanced protections for families residing in military housing
- Secured back pay for federal recognition of promotions
- Defeated the 'COLA minus 1 Percent' reduction in retired pay
- Halted military treatment facility downsizing
- Boosted compensation significantly for retirees with 50% VA disability or greater

STAY INFORMED ON LEGISLATIVE ISSUES AND MORE

Legislative Action Center

Our Legislative Action Center empowers you to engage with your lawmakers on issues impacting the uniformed services and veteran communities. Learn more at moaa.quorum.org.

MOAA Newsletter & Military Officer Magazine

MOAA offers a weekly e-newsletter with updates on legislation, benefits, finance, and more, plus a monthly magazine featuring in-depth coverage of military life and policy issues.

CONTACT YOUR LOCAL CHAPTER:

[Chapter Name]

[Chapter Lead Name]

[Chapter website]

[Chapter Lead contact info]



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MOAA Privacy Policy

CAPT Jim Carman, CAE, USN (Ret)



Privacy Policy Update

- **Background:**
 - Multiple privacy policies in effect based on member join date
 - Member privacy preferences stored in 3 different data bases
- **Implementation of Revised MOAA Privacy Policy:**
 - Outside privacy policy law experts consulted during development
 - Phased implementation began on July 14
 - Members to be notified of the new privacy policy and will be given the chance to opt out
 - Developing guidelines for chapter communication with non-chapter affiliated national members
 - Council/chapter notifications to begin after allowing members to express their communications preferences
 - Anticipate a significant increase in prospective member data available to chapters after implementation complete

Advocacy in Action (AiA) Summer 2025 Campaign



Summer Advocacy in Action

- **Summer AiA with launch article, landing page, and emails to advocates begin 8/7**
 - Campaign information will be shared with C&C leaders early as finalized
 - Pivoting topics from Spring AiA due to lawmaker momentum
- **Topics:**
 - **Major Richard Star Act** – Establishes concurrent receipt for Chapter 61 (medically retired) retirees.
 - Introduced as amendment to the Senate NDAA on 7/22.
 - **TRICARE Access to Care** – NDAA provides a path forward for two bills that would improve access to care.
 - **Improving Access to Prenatal Care for Military Families Act** – Makes pregnancy a TRICARE QLE
 - **TOTAL Care Act** – Eliminates need for OB-GYN referral (brings TRICARE Prime in line with commercial plans)
 - **Military Spouse Hiring Act** – Adds military spouses to the WOTC.
- **Messaging focus:** Supporting servicemembers and military families, is key component of *mission readiness*



Discussion:

What strategies have worked for you?





Thank you!

chapters@moaa.org



Skip's Tips

- Get to know any civilian county VSOs in your catchment area. Share chapter info: copies of newsletter or other membership materials, upcoming events, etc. Ensure the VSO knows of the MOAA Foundation crisis relief program, interest-free education grants and loans, MOAA transition webinars, etc.
- If there are county or area-wide events, offer to sponsor a portion, like providing water or dessert. See if the chapter can set up a table.
- Develop relationships with Commanders , XO's, and Senior NCOS and share these resources. In addition to supporting JROTC and ROTC award programs, make sure they're also aware.
- Do the same for Family Readiness Groups, especially if they have an off-post/out of the Reserve Center/Armory. Offer to sponsor some part of the event.

Skip's Tips

- Host an information table at job fairs, especially veterans job fairs.
- Sponsor a table at a local farmer's market.
- When advocating with elected officials mention the MOAA Foundation grant programs that demonstrate that while “MOAA is an organization of officers, it is not an organization just FOR officers.”
- Councils can establish a recruiting budget line from which Chapters can get at least partial reimbursement for incurred expenses. In NYS, they provide up to \$125.
- Council leaders can offer to accompany chapters as they do the above things.