

**2019**  
**Chapter Recruiting Program**  
**Guide**



Index

2019 Key Dates	1
Chapter Recruiting Awards and Incentives	2
Seven Reasons to Join a Chapter	3
Chapter Membership Talking Points	4
How to Work the Recruiting List	5-7
How to Add New Chapter and MOAA Members	8-10
Sign Up for Electronic Funds Transfer	11
Online Chapter Member Dues Join and Renewal Program	12
Chapter Electronic Support Messages	13
Chapter Voucher Program	14
National MOAA Membership Model	15
National MOAA Membership Incentives	16
National MOAA Membership Talking Points	17
Training Tools	18
USAA/MOAA Sponsorship Program	19
Mercer Insurance Advertising Program	20
FAQs	21-23

## 2019 Key Dates

- January**
- Chapter Recruiting Campaign Announcement
  - Competition officially begins (Jan. 16)
  - Quarterly Leaders' Workshop (Orlando, Fla., Jan. 11-12)
  - Tabulation of results for 2018 Chapter Recruiting Program
- February**
- Committee Module Chapter Roster updated by Feb. 28
  - 2018 annual awards winners announced and end-of-year incentive disbursements
- March**
- 2018 Col. Marvin J. Harris Communication Awards packages due (March 1)
  - Committee Module Database Snapshot (March 2)
  - Recruiting list sent to chapter presidents and membership chairs
  - Calculate 2018 Retention Incentive
- April**
- Announce quarterly council and nonaffiliated chapter winners by region
  - 2018 Col. Marvin J. Harris Communication Award winners recognized
  - Council Presidents' Seminar/Storming the Hill (April 10-11)
- May**
- 2018 Levels of Excellence (LOE) Awards submissions due (May 1)
  - Quarterly Leaders' Workshop (Northwest region/Portland, OR, May 3-4)
- July**
- Announce quarterly council and nonaffiliated chapter winners by region
- August**
- Visit congressional delegation in home district
- September**
- Quarterly Leaders' Workshop (Northeast region/Hershey, PA, Sept. 6-7)
- October**
- Announce quarterly council and nonaffiliated chapter winners by region
- November**
- MOAA annual meeting (Alexandria, VA/Nov. 3-4)
  - Quarterly Leaders' Workshop (South central region/TBD, Nov. 15-16)
- December**
- Competition closes Dec. 31 (quarterly council and nonaffiliated chapters by region and annual award winners by categories announced in 2020)

## 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 2019. Each new chapter member is eligible to receive only one monetary incentive, and incentives cannot be combined with other Chapter Recruiting 2019 incentives.

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

- 1) not eligible for national MOAA membership or failed to join MOAA, or
- 2) 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 80 percent or more of their membership, as determined by national MOAA. To be eligible for the retention incentive, your chapter must have met the Feb. 28, 2019, cutoff date to update your roster through the Committee Module.
- \$500 award for chapters that recruit the most 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 nonaffiliated chapter (no state council; minimum of 10 new incentive-qualified chapter members).

## Seven 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. 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. **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 their "officership" service 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 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 Junior ROTC, ROTC, and newly commissioned officer programs
- Opportunities for local networking for second-career servicemembers
- 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 late March or early April of each year, national MOAA provides to each of its chapters a recruiting list, which can serve as the foundation for the chapter's annual recruiting campaign. Because the 2019 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 more 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 ShareFile email to all chapter presidents and membership chairs. 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 might find, and send your annotated list to MOAA via email ([chapters@moaa.org](mailto:chapters@moaa.org)) or send a hard copy to MOAA, 201 N. Washington St., Alexandria, VA 22314, ATTN: Member Service Center. 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 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, they

probably are 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 the prospect.
- 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 might 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.

**NOTE:** 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 is not cheap — particularly if your prospect list contains hundreds of names. You might 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 might 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 might 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 also is highly recommended 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 might be rejected and given back to you for rework.

**NOTE:** You should check with your local post office for current fees and pricing.

Some chapters use a personal touch and call each prospect if a phone number is given. Not only is it cheaper to call prospects, it also might 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 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 email 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 emailing their newsletter — at no cost — to prospects.

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 email 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 Add 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 add new chapter members through the [Committee Module](#), 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 2019.

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, or
2. is added to the [Committee Module](#) as a new chapter member gain but previously was reported to MOAA as a chapter member within the past three years.

**MOAA'S COMMITTEE MODULE 2.0**

Details for: Julie's Test Chapter

Last Name:  First Name:  Email:   
City:  State/Province:  Country:   
Position:   Current  Future

Chapter Information Form

Actions:   Actual Chapter Member Count: 32

Displaying 1-20 of 44

Customer ID	Last/First Name	Position	Membership	Rank	Location	From/To	Contact Information	Voting Status	Status
<input type="checkbox"/> 04910709	Noyes, William	Member			201 N Washington St Alexandria, VA 22314-2520	01/02/2018	parkson@moaa.org	Voting Member	Active

**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, by completing an online application, or during a conversation with the potential member. 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 add new chapter members you sign up?

**NOTE:** You can add new chapter members who are newly commissioned officers, cadets, and former members of your chapter. However, you must comply with the paragraphs above to receive a monetary incentive.

1. Add 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. To add a new member using the Committee Module, you must first locate their record through the module. When conducting a search to add a new member, 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, follow Step 3, below.
3. Report a brand new chapter member via the online Chapter Member Gain Form at this link: <https://fs20.formsite.com/moaaweb/ChapterRecruiting/index.html>. We developed this online option to simplify and automate the process of reporting prospective members. However, it's acceptable to consolidate and send in the information on an Excel spreadsheet, particularly when reporting more than five brand-new non-MOAA 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? What if the new chapter member you reported is not a national MOAA member?

1. We encourage you to sign up new national MOAA members when 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. 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 to 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/Membership%20Application%20Brochure-2019.pdf](http://www.moaa.org/uploadedFiles/Content/Chapters_and_Councils/Membership%20Application%20Brochure-2019.pdf)

Another option is to print one copy of the online form, write or stamp your chapter name on it, then make black-and-white copies. In addition, you also can request additional hard copies of all forms and brochures by contacting the MOAA Member Service Center at [msc@moaa.org](mailto:msc@moaa.org) or (800) 234-6622. Please be sure to identify your chapter and the name of the requestor.

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

The Electronic Funds Transfer (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, 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. 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: Rebecca Culhane, ext. 120, or Daniel Slattery, 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.

## 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](http://www.moaa.org/privacy). (Go to [www.moaa.org/privacy](http://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 solely on 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 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>. You can also email [chapters@moaa.org](mailto:chapters@moaa.org) with any questions.

## 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), and
- 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, 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 might be required to make edits to meet message-formatting requirements.

National MOAA requires 60 days of advance notice to pull the appropriate email distribution list, 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 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 a voucher good for a one-year chapter membership, and LIFE members receive a two-year voucher. 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 added to the Committee Module as a new chapter member. Presidents or membership chairs can view the new member's MOAA membership status after adding the new member through the module.

Report a new chapter member via the Committee Module. If the new member is a prospect (i.e. has not yet joined MOAA National) use the online Chapter Member Gain Form at <https://fs20.formsite.com/moaaweb/ChapterRecruiting/index.html>. We developed this online option to simplify and automate the process of reporting prospective members. If/when the recruiter is able to encourage the new member to join as a PREMIUM or LIFE member, the record will show up in the chapter's Committee Module with their membership status present.

Return of the voucher to MOAA is not required since member records are electronically flagged.

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. Additionally, the chapter voucher program cannot be combined with other Chapter Recruiting 2019 incentives. Each new chapter member recruited is eligible for only one type of incentive payout.

## National MOAA Membership Model

MOAA offers three membership tiers: BASIC, PREMIUM, and LIFE Membership. The model is designed to take members from an introduction to MOAA, to accessing the full suite of member benefits, to becoming an elevated supporter and promoter of MOAA.

### **BASIC Membership**

This membership level expands MOAA's reach to younger officers currently in uniform by offering a relevant and compelling electronic experience (at no fee), and emphasizes MOAA's strong advocacy on their behalf. Features of a BASIC Membership include:

- Promoting a strong national defense. MOAA advocates for a strong, top-quality career force with compensation and benefits for servicemembers, retirees, and veterans and their families and survivors that is commensurate with the extraordinary demands and sacrifices imposed upon them.
- Tailored communications from MOAA about the legislative issues that impact BASIC members and their families.
- Information on the importance of chapter membership and how to locate the nearest chapter.

### **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 capitalizes 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 become a LIFE member at any time. You can access the LIFE rate schedule through the "Why Join" section on the MOAA homepage and by calling MOAA's Member Service Center (800) 234-6622. LIFE Membership has a separate Dual Military Spouse rate schedule.

## **National MOAA Membership Incentives**

The 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 five to qualify)
- \$200 chapter incentive for recruiting new LIFE members (minimum of five 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 90 years. We are the largest association of officers with 350,000 members and more than 400 affiliates nationwide.
- We are the cochair of The Military Coalition, which has 32 members.
- Even though we're an association of officers, our primary focus is advocacy on the Hill for all uniformed servicemembers of all ranks and in all components and their families.
- Here are some of MOAA's noteworthy legislative gains:
  - Fought to keep TRICARE For Life as a benefit paid in full through service and sacrifice
  - Eliminated Social Security offset for Survivor Benefit Plan payments
  - Repealed CPI-1% COLA cut for military retirees
  - Retained dual military couple housing allowance eligibility
  - Fought for and won the Post-9/11 GI Bill
- 2019 Legislative Goals:
  - Ensure any TRICARE reform sustains access to top-quality care
  - Prevent disproportional TRICARE fee increases
  - Sustain military pay comparability with the private sector
  - Block erosion of compensation and non-pay quality of life benefits
  - End financial penalties for military survivors and end concurrent receipt penalties for military retirees
  - Achieve equity of benefits for Guard/Reserve members with their active duty counterparts
  - Strengthen DoD-VA collaboration and services to support wounded warriors and an expanding population of women veterans
  - Ensure timely access to service-earned VA benefits
  - Protect military and veteran family support programs and policies
- Numerous products and services:
  - Insurance plans and discounts on travel, lodging, and more
  - Benefits information
  - Transition and job assistance; scholarships and education assistance
- BASIC membership is free and all electronic.
- 2019 PREMIUM membership rates are \$48 annually (\$43 for surviving spouses); discounted 15 percent at \$82 for a two-year membership (\$73 for surviving spouses); and discounted 25 percent at \$108 for a three-year membership (\$97 for surviving spouses).
- LIFE Membership rates are tiered based on age.

## Training Tools

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

To better address key chapter-management issues, national MOAA 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 (<http://www.moaa.org/Content/Chapters-and-Councils/Council-and-Chapter-Management/Webinars.aspx>) to view recently archived webinars, 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 partner, USAA, recognizes many noteworthy community-focused programs and events initiated by MOAA councils and chapters need financial support to “get to the finish line.” USAA, in partnership with national MOAA, has established a fund to provide some financial backing to councils and chapters.

Each council and chapter can make one request every 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 ensure fair share of 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 councils and chapters 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 2019 request as early as possible.

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

**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 that would meet the spirit and intent of the program would be state council conventions, chapter events that recognize ROTC/Junior ROTC students and enhance relationships with those schools, and golf tournaments or fundraising events for chapter scholarship or awards programs. Some examples that 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.

**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.

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

**4. National MOAA forwards the sponsorship request to USAA for final approval.** The council or chapter will be notified promptly if the request has been denied. Upon approval, USAA will disburse funds to the council/chapter five to seven 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.

## **Mercer Insurance Advertising Program**

Mercer Consumer, MOAA's third party insurance administrator, is continuing its advertising program in 2019 in support of MOAA's councils and chapters. Mercer designed an advertisement to promote brand awareness for MOAA's insurance plans, and the ad is available by request for interested councils and chapters to place on their website, in a newsletter, or in another publication. Mercer will process the requests for advertisements along with a \$100 payment to the council or chapter for ad placement. Each council or chapter is eligible to request one advertisement for MOAA's insurance plans and placement payment per year, and the council or chapter must commit to using the advertisement at least one time. Requests must be submitted to Mercer by May 31, 2019, even if the ad will not be published until later in the year.

Here's how to enroll in Mercer Insurance's advertising program.

1. Send an email request to Michele Armesto ([michele.armesto@mercerc.com](mailto:michele.armesto@mercerc.com)) at Mercer Consumer, MOAA's Insurance Administrator, by May 31, 2019, with "Council/Chapter Ad Request" in the subject line.
2. Include your contact information and attach a completed W-9 form for your council or chapter in your email request.
3. Mercer will start processing your request upon receipt of your email.

For further details and to see a sample of the advertisement, click here:

[www.moaainsurance.com/Council-and-Chapter-Ad](http://www.moaainsurance.com/Council-and-Chapter-Ad)

If you have questions, please send an email to Michele Armesto ([michele.armesto@mercerc.com](mailto:michele.armesto@mercerc.com)) at Mercer Consumer.

## Frequently Asked Questions

**Q: What is the chapter recruiting campaign?**

**A:** Chapter Recruiting 2019 provides a single effort to recruit new chapter members. The ultimate goal is for MOAA to remain the premier military advocacy organization affecting legislation and making 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. 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 for downloading and printing from your computer.  
[http://www.moaa.org/uploadedFiles/Content/Chapters\\_and\\_Councils/Membership%20Application%20Brochure-2019.pdf](http://www.moaa.org/uploadedFiles/Content/Chapters_and_Councils/Membership%20Application%20Brochure-2019.pdf)

You can also request additional hard copies of all forms and brochures by contacting the MOAA Member Service Center at [msc@moaa.org](mailto:msc@moaa.org) or (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 members must be added through the Committee Module. If the new recruit has never joined MOAA before, chapter leaders must submit the required information using the reporting mechanism — the online Chapter Member Gains Form — to report new chapter members in real time to MOAA. Within approximately one week, the MOAA staff will add the non-MOAA member to MOAA's rolls as a Prospect and notify the submitter that this action is complete. The chapter can then add the new member to their rolls through the Committee Module.

When using the Chapter Member Gains form, fill out the information requested, and MOAA will acknowledge receipt of the information and list the names of the (non-MOAA) new chapter members submitted. We developed this on-line form in an attempt to simplify the process of reporting (non-MOAA) new members. If you prefer, you can consolidate and send in the 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 of Jan. 16–Dec. 31, 2019. Councils and chapters are eligible for quarterly awards during the following periods: Jan. 16-March 31; April 1-June 30; July 1–Sept. 30; and Oct. 1–Dec. 31.

**Q: How will we know how we're doing in the competition?**

**A:** MOAA's Council and Chapter Affairs team will post weekly updates beginning April 2019 on MOAA's website. Additionally, the president or membership chair will add their new members to their roster in the Committee Module to keep track of their members recruited.

**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 350,000 — giving us the strength to be heard on Capitol Hill and preserve your benefits. Recruiting new national MOAA members not only will strengthen chapters, it also 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 five new paid PREMIUM members, the chapter is eligible to receive \$100, and for every five new paid LIFE members, the chapter is eligible to receive \$200.

**Q: How do we notify national MOAA 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 fifth 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 used by national MOAA to speed up the distribution of incentive money earned through the Chapter Recruiting 2019 campaign. Not only will you receive the funds sooner, EFT also will 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 information?**

**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. Leaders can update their officers through the Committee Module. You must log in using your credentials to update your officers. [LOGIN](#)
- **[Council and Chapter Policies and Procedures Guide](#).** This guide contains everything council and chapter leaders need to start, run, and manage a MOAA affiliate. You must log in to view this guide.
- **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 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 Communication Awards.** Each year, national MOAA holds these 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, pins, and leadership awards.** National MOAA has certificates and individual awards available for various types of recognition. 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)
- **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.** <http://www.targetlogosonline.com/moaa/>