



STRATEGIC PLAN

2022 TO 2026

EXECUTIVE SUMMARY

The Military Officers Association of America 2022-26 Strategic Plan is a vibrant, living document. It establishes and articulates the MOAA Board of Directors' strategic vision, mission, values, goals, and six specific strategies to accomplish MOAA's mission and ensure long-term improvement of the association — and is continuously referenced, reviewed, and refreshed annually to maintain its currency and relevance.

The plan also provides a blueprint of MOAA's business model and the environment in which we work to set the stage for the staff to prepare an operational roadmap in all their departments for support, alignment, and collaboration for the goals set forth.

MOAA's vision, mission, and values are:

Vision: Be recognized and respected as the foremost organization advocating on behalf of the uniformed services community and its family members.

Mission: To preserve and protect earned benefits for our uniformed services, veterans, their families, and surviving spouses through advocacy, leadership, education, and service.

Values: Expressed by our commitment to “Never Stop Serving” and articulated through four tenets: service, leadership, diversity and inclusion, and professionalism.

MOAA's six strategic priorities are Advocacy, Membership, Councils and Chapters, Philanthropy, Engagement, and Resources.

The relationships between the plan's six strategic priorities are illustrated in the form of a neoclassical building (Figure 1). The foundation sits on the bedrock of MOAA's vision, mission, and positive values, setting the standards and supports for the integrated areas of focus.

Two of the strategic priorities, resources and engagement, are floors that span the length of the entire building spaces. Financial, human capital, technology, and infrastructure resources enable and energize activities, while positive, targeted engagement across the strategic priorities position MOAA for mission success.

Three of the strategic priorities are shown as vertical, structural columns. Each represents the functional priorities of Membership,

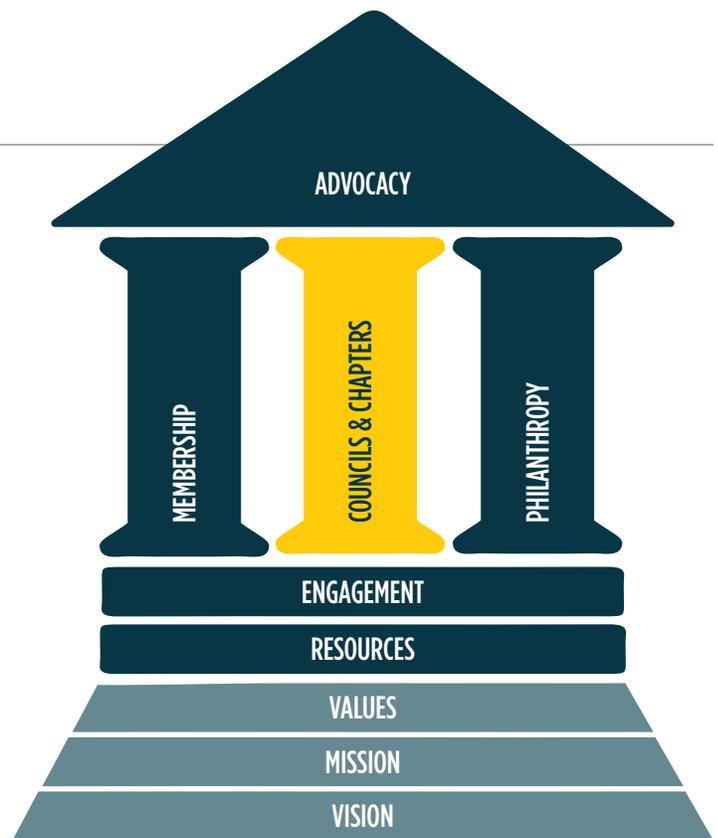


FIGURE 1

Councils and Chapters, and Philanthropy. They are load-bearing columns sufficiently resourced and reinforced with positive engagements. Together, they support the roof, the strategic priority of Advocacy on behalf of the men and women of the uniformed services, as well as their families and surviving spouses.

The board of directors should use the plan as a guiding and living document in assessing the health of the association and performance of the senior staff. Accountability for attaining MOAA's six strategic priorities rests with the senior headquarters staff and with the relevant committees of the board of directors.

Our success will be measured by the association's commitment to embrace the plan and its ability to develop the supporting staff-level operational plans and both strategic and operational metrics to ensure all the priorities, goals, and strategies are producing mission success.

This overarching view combines with a disciplined, long-term approach to protect pay and benefits supporting all ranks and branches who serve or have served, as well as family members and survivors. Important, too, are efforts to provide value to members for their continued support and their selfless work to Never Stop Serving — our motto — in their communities.

MISSION AND VALUES



MOAA is a nonprofit, nonpartisan association of officers from America’s uniformed military services and the Commissioned Corps of the U.S. Public Health Service and National Oceanographic and Atmospheric Administration. We are active duty, retired, former, and National Guard and Reserve officers, and surviving spouses, supporting all ranks and branches who serve or have served, as well as family members. MOAA advocates with Congress, DoD, the VA, and other departments to preserve and protect commitments made on behalf of a grateful nation to those who have served and those who continue to serve our country, fulfilling MOAA’s promise to “Never Stop Serving.”

Vision: Be recognized and respected as the foremost organization advocating on behalf of the uniformed services community and its family members.

Mission: To preserve and protect earned benefits for our uniformed services, veterans, their families, and surviving spouses through advocacy, leadership, education, and service.

Values: Expressed by our commitment to “Never Stop Serving” and articulated through four tenets: service, leadership, diversity and inclusion, and professionalism.

- Service – Develop and maintain an engaged nationwide community of support for all Americans who now serve or have ever served, and their families.
- Leadership – Exemplify leadership to our nation and encourage it to honor its commitments to those who serve or have served, their families, and surviving spouses. Advocate wisely and collaborate with diverse veterans and military organizations to protect the welfare and future of our men and women in uniform. Support collaborative solutions to preserve a strong national defense.
- Diversity and inclusion – Embrace the growing diversity of our uniformed services and our nation as a strength, attract more diversity among our membership, and include diverse perspectives as we accomplish our mission.
- Professionalism – Embody the ideals of “officership” – duty, honor, integrity, selfless service, and excellence – to champion our mission of advocacy for our uniformed services, valuing those who have served and connecting our nation with the very people who have sworn an oath to defend it.

CURRENT ACTIVITIES AND BUSINESS MODEL



MOAA's business model is based on membership, with significant funds also derived in the form of investment income, royalties, and advertising. As a membership-based organization that relies on annual dues, it is critical to demonstrate value to our members and positive impact in the communities we serve. This is achieved with a comprehensive advocacy action plan, relevant news and information, discounted products and services, community engagement opportunities through MOAA Councils and Chapters, philanthropic initiatives, and a robust suite of programs and services, all designed to support servicemembers, veterans, military families, and survivors at every stage of life and career.

Dues from Premium and Life members finance about 30% of the cost of operations to support our advocacy efforts and other operations. Additionally, our basic membership level connects us to a new generation of members and provides us the opportunity to convert them to dues-paying status once we have proven our value and acquired their trust. While they do not directly bring in dues revenue, they participate in our advocacy efforts, bring value to our affinity partners and advertisers, and in some cases, deliver royalty revenue to MOAA.

Dues revenue also contributes to other critical MOAA programs, along with investment income (about 30% of MOAA's revenues)

and non-dues income (about 40%, from royalty agreements and advertising). MOAA's royalty and advertising revenues depend on maintaining a membership base large enough to attract corporate marketing. MOAA's membership base also contributes to our clout and influence on Capitol Hill as we work to advance our advocacy agenda.

MOAA expects royalties and advertising strategies to evolve along a competitive insurance marketplace and a digital future for information and advertising. To address the changing marketplace, we will advance with new products, enhance current products to make them more competitive, and increase digital advertising opportunities.

The MOAA Foundation and MOAA Scholarship Fund offer additional support to the uniformed services community and further enhance the MOAA brand. The Scholarship Fund is a 501(c)(3) program providing educational assistance benefits to children of military families in the form of interest-free loans and grants. The MOAA Foundation, also a 501(c)(3), offers professional development, education support, and emergency relief to more than 100,000 currently serving and veterans of all ranks, their families and their survivors each year.



CURRENT ACTIVITIES AND BUSINESS MODEL

Providing member value is the association's focus, with an objective to strengthen membership. We seek to achieve this objective in these ways:

- MOAA co-leads a coalition of 35 military and veterans organizations in The Military Coalition (www.themilitarycoalition.org). Our leadership role in the coalition and our record of legislative successes on Capitol Hill are unmatched. We have been at the forefront of efforts to secure lifetime health care with TRICARE For Life and the groundbreaking passage of the Post-9/11 GI Bill. We led the repeal of "COLA minus 1 percent" legislation and consistently protected housing allowances from significant reductions. In 2019 we achieved repeal of the decades-long Survivor Benefit Plan-Dependency and Indemnity Compensation offset, resulting in an average of nearly \$12,000 annually for 66,000 surviving spouses, the vast majority of whom are former enlisted spouses. MOAA was instrumental in the passage of The Blue Water Navy Vietnam Veterans Act of 2019 supporting claims for those who served at sea and were exposed to Agent Orange. Further, MOAA's continued engagement on the Hill on behalf of these veterans resulted in the addition of six conditions to the Agent Orange presumptive-conditions list: bladder cancer, hypothyroidism, Parkinsonism, asthma, rhinitis, and sinusitis.
- Our 10 registered lobbyists engage Congress across the spectrum of pay and benefits, health care, and other issues impacting the quality of life for those in and out of uniform and their families. They also engage the White House, DoD, the VA, and other governmental and non-governmental stakeholder groups as needed. As fiscal challenges persist on Capitol Hill, MOAA will continue to be vigilant to ensure costs of essential programs are not funded on the backs of our servicemembers, our veterans, or their families. Our nation's promise to those who serve, and those who completed a career of service, is to protect the value of their compensation, access to health care, and other service-earned benefits.
- A network of more than 400 affiliates — councils and chapters — offers members the opportunity to connect with other military officers, generate grassroots support for our legislative agenda, support membership growth at the local and national levels, and provide MOAA "ambassadors" who promote patriotism and service in communities and schools across the country. They are part of the nonprofit fabric in their community, providing support and assistance in local causes, while building the MOAA brand.
- *Military Officer* magazine and our digital media platforms, email newsletters, and video and social media channels inform and engage members and prospects.
- We offer best-in-class insurance and a range of financial and other products at advantageous rates.
- Our Transition Center professionals prepare servicemembers and their spouses for civilian employment and subsequent advancement, advise them on career-development strategies, and provide financial education and benefits assistance.
- We maintain a library of easy-to-understand resources reviewing financial matters and benefit programs pertinent to the uniformed services, veteran, and surviving spouse communities.
- Our Member Service Center engages with current and prospective members regarding member services, legislative advocacy, access to earned benefits, and other issues of concern.
- With the success of The MOAA Foundation's COVID-19 Relief Fund, MOAA is developing an enduring emergency relief fund to assist uniformed services personnel, veterans, and their families during natural disasters, catastrophic events, and other emergency situations.



THE ENVIRONMENT



MOAA addresses challenges specific to the uniformed services as well as other military organizations in general. Veterans of World War II, Korea, Vietnam, the Gulf War, and the Iraq and Afghanistan campaigns have supported MOAA for more than 90 years, and we remain grateful for their support.

Future members will be drawn from a much smaller and increasingly diverse pool of eligible officers who view member value differently than their predecessors. With the 21st-century military's intense operational tempo and continuing demographic changes in the active force, these potential members will have had a different service experience and will have different expectations than their predecessors.

Their motives for becoming engaged in the work of associations like MOAA also are different from those of older generations. The latter often want to enjoy the camaraderie of being with their peers, while younger officers are more likely to seek ways to be hands-on in impactful charitable activities. Previous generations of officers developed their preferences at a time when most families had a sole, male breadwinner. They typically received information from their TV, radio, and local newspaper.

Today, most families rely on dual incomes, and women lead more households than ever before. Compared to earlier generations, today's officers face more complex factors when attempting to secure their financial future.

MOAA's future requires the organization to support its current members, expand its member base, increase outreach to those currently serving, and invest in understanding and diversifying the organization so our membership is reflective of the uniformed services of today and tomorrow. MOAA will encourage our councils and chapters to recognize that outreach into the local community strengthens MOAA's effectiveness as an organization by supporting those who have served, those who are currently serving, and their families.

MOAA will continue to focus on issues such as education, professional development and transition readiness, areas likely to appeal to the next generation of officers.

The COVID-19 pandemic accelerated virtual tools and the abilities of many Americans to use virtual forms of communication. MOAA must continue to adapt to meet future members' needs in a technologically advanced and socially connected world. The key to future success will be our ability to leverage innovation and technology to make our suite of services scalable and globally accessible for an increasingly mobile audience. Video, digital, and social media platforms will be increasingly important to this effort.

Moreover, MOAA must demonstrate this ability in a highly competitive marketplace: According to GuideStar.org, there have been as many as 45,000 nonprofits devoted to serving veterans and their families in this decade, and there are many emerging

THE ENVIRONMENT



JOINT HOUSE AND SENATE VETERANS AFFAIRS HEARING ON CAPITOL HILL

and transitory groups positioning themselves to cater to the needs of the newest generation of servicemembers and their families.

MOAA's focus on its two charitable subsidiaries, the MOAA Scholarship Fund and The MOAA Foundation, positions us to continue to make significant contributions to the uniformed services, veteran, military family, and surviving spouse communities. While the potential for "donor fatigue" exists, the generosity of our current members, and the commitment to social impact and service exhibited by the next generation of members, creates a unique opportunity to further establish MOAA as a leader in the veterans service organization (VSO)/military service organization (MSO) community.

The legislative environment offers an increasingly high degree of uncertainty and additional challenges. MOAA is uniquely positioned, being both a VSO with a focus on federal and VA actions and an MSO focused on DoD actions, allowing us an advantage to bridge the gaps between these two entities.

In addition to existing budget challenges, there is the future impact of the strain the COVID-19 crisis has placed on our nation. Trillions of dollars of emergency relief have compounded our national debt and will result in future budget constraints. If the past tells us anything, DoD will respond to these budget challenges by trading people programs — end strength, pay, health care, and more — to keep weapons modernization and current readiness on track to support the National Defense Strategy.

Congress, with input from DoD, can be expected to continue targeting personnel costs by cutting troop strength, capping future pay raises, raising health care fees, and continuing to cut retirement pay and benefits by changing current legislation to specifically impact retirees younger than 62.

In a polarized political environment, the fact MOAA advocates for a military constituency valued by members of both parties is a positive attribute. MOAA must continue to ensure its advocacy and messages are bipartisan or nonpartisan. This may be challenging when an issue of concern to our constituents, or which affects military preparedness, is associated with partisan stakeholders.

The bottom line is MOAA will always strongly advocate for our uniformed servicemembers, their families, and survivors. Issues like health care, disability compensation, toxic exposure, military pay and benefits, and many others will be prominent among our advocacy agenda. Given the financial backdrop, we will need to sharpen our focus, and we may need to accept incremental progress on key issues. We are in it for the long haul, and as our victory on eliminating the Survivor Benefit Plan-Dependency and Indemnity Compensation offset for surviving spouses showed, we'll stay on task for decades, if necessary, until we achieve the results our servicemembers, families, and survivors deserve.

GOALS AND STRATEGIES



MOAA's strategic plan sets priorities for the organization within six major areas: Advocacy, Membership, Councils and Chapters, Philanthropy, Engagement, and Resources. It also identifies specific goals and strategies for staff and board

members to achieve success over the period of the plan. Accountability for attaining MOAA's goals rests with the senior headquarters staff and with the relevant committees of the board of directors.

STRATEGIC PRIORITIES: ADVOCACY



The ADVOCACY strategic priority is to encourage the federal government to enact and maintain policies, compensation, and benefits that sustain an all-volunteer force of the size and quality needed to maintain a strong national defense, and that fulfills commitments to those who have served.

Our focus will consider the political climate, fiscal state, and the legislative priorities of Congress.

OUR SPECIFIC GOALS:

- Ensure regular military compensation and service-earned benefits for active duty, Guard, and Reserve members are not eroded by cost-saving measures that shift financial burdens onto servicemembers and their families.
- Ensure military pay increases are consistent with the private sector (Employment Cost Index); sustain COLA raises for retirees.
- Ensure changes to the military health system sustain beneficiary access to high quality care and prevent negative impacts on military medical readiness.
- Protect the value of the earned TRICARE benefit by opposing disproportional fee increases and ensuring coverage policy is regularly updated.
- Protect the TRICARE pharmacy benefit and advance program improvements that address beneficiary complaints and remove barriers to prescription medication compliance.
- Ensure timely access to service-earned VA benefits and oppose efforts to use veterans' disability compensation, health care, or other benefits to pay for VA improvements.
- Strengthen DoD-VA collaboration.
- Strengthen services to support wounded warriors, an expanding population of servicewomen and women veterans,

and the caregivers who provide essential support.

- Improve survivor benefits.
- Protect the commissary benefit.
- Guard against cuts to uniformed service quality-of-life programs and advocate for oversight of public/private initiatives.
- Increase incentives for businesses to hire veterans and spouses, such as the Work Opportunity Tax Credit for employers.

OUR STRATEGIES:

- Execute our leadership role in The Military Coalition regarding compensation, entitlements, and health care issues for servicemembers, retirees, veterans, their families, and surviving spouses by maintaining collaborative leadership roles in the coalition and its committees.
- Conduct strategic Capitol Hill engagements aimed at fostering relationships with key legislators on committees and caucuses aligned with MOAA priorities. Develop and maintain strategic relationships between MOAA leadership and key legislators, and leading members of the executive branch, including the secretaries of Defense, Veterans Affairs, Homeland Security, Health and Human Services, and Commerce.
- Maintain and enhance MOAA's reputation of integrity and nonpartisanship via objective analysis and assessment of legislation impacting uniformed servicemembers and veteran communities.
- Increase member and nonmember participation in state and federal level advocacy activities.
- Develop an advocacy narrative for internal and external consumption, with emphasis on valuation in terms of financial and economic impact to uniformed servicemembers, retirees, veterans, their families, and surviving spouses.

STRATEGIC PRIORITIES: MEMBERSHIP



The MEMBERSHIP strategic priority is to grow overall membership, thereby increasing MOAA's powerful voice where it matters most. In this mission, we will employ strategies that contribute to long-term growth of our Premium and Life categories and identify opportunities to increase dues revenue. To achieve success, we will maintain an intense focus on delivering relevant value propositions to our members in ways that enhance their engagement and identification with MOAA.

OUR SPECIFIC GOALS:

- Maintain paid membership levels, which will require modest annual increases in renewal rates of 0.5% annually (increasing from 79% in 2021 to 81.5% by 2026) and conversions to paid status by 3% annually (increasing from 3,535 in 2021 to 4,100 in 2026).
- Increase brand awareness within the universe of prospective members and their families.
- Embrace and advance inclusion in the organization as we work to grow MOAA membership into a highly diverse organization representative of today's uniformed services.
- Enable current and prospective members to find and use MOAA services and products that best meet their individual needs at all life stages and to demonstrate the relevance and value of membership.

- Increase commitment and participation levels to yield greater member lifetime value over the term of this plan.

OUR STRATEGIES:

- Enhance and refine the member experience to ensure messaging and engagement opportunities align with a current or prospective member's unique needs and awareness levels of the organization.
- Expand the outreach program to enhance engagement of current and prospective members and allow them to better experience the MOAA brand.
- Identify opportunities to better understand the unique needs of the diverse segments within MOAA's membership in order to create a welcoming and supportive environment in which all MOAA members can thrive.
- Build and sustain mutually beneficial partnerships aimed at creating equitable opportunities and a sense of belonging within MOAA.
- Implement the approved dues strategy to align with member perceptions and a rapidly changing market to drive revenue growth and ensure MOAA's continued financial stability.
- Align efforts related to membership, councils and chapters, and member services with the aim of increasing engagement, relevance, and membership.
- Review membership eligibility requirements.

STRATEGIC PRIORITIES: COUNCILS & CHAPTERS



CHAPTER MEMBERS SERVING THEIR COMMUNITIES

The COUNCILS and CHAPTERS strategic priority is to grow and strengthen a powerful nationwide network of active and engaged affiliates to influence legislation, serve their local communities in impactful ways, grow membership at the local and national levels, and increase MOAA brand awareness nationwide. We recognize that affiliates — councils, chapters, and satellites, both geographic and virtual — are volunteer-led independent entities with limited resources. The execution of the below goals and strategies will require a tailored approach to stimulate success in affiliates of varying sizes, recruiting environments, and organizational characteristics.

OUR SPECIFIC GOALS:

- Increase overall chapter membership, emphasizing younger members to mitigate attrition and leadership succession challenges inherent in an aging volunteer membership.
- Strengthen and grow our virtual chapters.
- Expand headquarters support to all affiliates in the areas of non-dues revenue generation, advocacy engagement tools, recruiting and retention, leadership succession, communications, administrative and technology assistance, and leadership development.
- Share information across the affiliate network on best-in-class practices, emphasizing advocacy, membership growth, and community service, thereby increasing MOAA brand awareness among prospective members and their families.
- Strengthen affiliate legislative advocacy to maintain legislative influence in every state.

OUR STRATEGIES:

- Increase the percentage of national members participating

in the affiliate system, in part by improving prospect and member data provided to affiliates. Likewise, increase the percentage of affiliate members becoming national members by communicating the value of national membership.

- Stimulate growth in the virtual chapter network by identifying prospective virtual chapter leaders and providing them with appropriate resources to conceptualize and establish additional chapters.
- Explore and pursue alternate affiliate structures and means of recruiting as necessary to adapt to variations in recruiting environment and other characteristics of geographic area or affinity groups.
- Maintain a vibrant, welcoming, diverse, and accessible affiliate system through programs that incentivize recruitment and retention of younger members and other underrepresented populations.
- Increase the role and influence of councils within the independent affiliate system in training, recruiting, and communications. Incentivize council involvement in chapter development and, likewise, incentivize active chapter participation in councils.
- Continue to strengthen the effectiveness of communications with and within the affiliate network by various means, to include: a) conducting periodic leadership workshops around the country with specialized training tracks for key volunteer leaders; and b) offering and encouraging acceptance of a MOAA national visit with every council annually, and with every chapter at a minimum of every three years, with the aspirational goal being every two years.
- Explore new technological solutions to provide affiliates with improved tools and resources facilitating legislative engagement, recruiting and retention, and networking.

STRATEGIC PRIORITIES: PHILANTHROPY

The PHILANTHROPY strategic priority is to improve the wellbeing of servicemembers and veterans, their families, and surviving spouses.

MOAA's two 501(c)(3) charities — The MOAA Foundation and the MOAA Scholarship Fund — support MOAA's community, both officer and enlisted, especially in times of need. The following goals and strategies ensure the charities' programs, services, and long-term sustainability.

OUR SPECIFIC GOALS:

- Ensure the programs supported by our charities are meeting the current needs of the communities we serve to the greatest extent possible, and our charities are equipped to meet emerging needs or fill in gaps in services when possible.
- Expand outreach efforts among our membership and the communities we serve to increase overall awareness of our charities and the importance of the services and support provided through our programs.
- Increase both participation and annual donor contributions to The MOAA Foundation to enable expanded support of MOAA programs; leverage the decades-long level of donor support and investment portfolio performance of the MOAA Scholarship Fund to provide more grants and scholarships to deserving individuals.
- Increase the number of planned and corporate gifts reported to both charities annually.
- Secure sufficient funding annually to reduce or eliminate The MOAA Foundation's reliance on MOAA's operating budget.
- Modernize current practices and leverage new technologies to improve performance in fundraising, donor communication, and management of all key programs.

OUR STRATEGIES:

- Regularly evaluate the needs of the communities we serve, reducing gaps in available resources, and growing opportunities to offer/expand support in areas aligned within mission scope and scale.
- Improve online presence and donation experience to increase both the number of first time and recurring donors, and the average gift size.
- Identify and adopt an improved student loan/grant management software solution.
- Enhance and increase stewardship and outreach efforts:
 - Revitalize and implement a more robust planned giving program to include a comprehensive tracking process.
 - Increase communications with current donors about outcomes and how their donations have a major impact for those we serve.
- Build and strengthen relationships with leaders and influencers in the communities we serve.
- Explore opportunities to promote programs through similar nonprofits/VSOs/MSOs, installation staff/leaders, and resource providers.



'My daughter and I are so grateful to find a good-hearted organization that helped us to pay our bills. ... Please continue to help other people who are struggling financially. We really appreciate you.'

Cynthia Farmer, whose husband, a veteran, passed away in 2017. She is one of many grant recipients made possible through The MOAA Foundation's relief efforts.



'MOAA understands that growing up in a military family is not always easy, and I can say for the military kids, we're grateful for their selfless encouragement and support.'

Karlyn Barron, a nursing student at James Madison University and MOAA scholarship recipient.

STRATEGIC PRIORITIES: ENGAGEMENT



The **ENGAGEMENT** strategic priority is to instill and integrate targeted, positive communications as a cross-cutting foundation directly supporting MOAA's encompassing priorities and missions. Engagement underscores the importance of positive connections and value-added communications across MOAA's mission areas as vital and powerful to advance MOAA goals and objectives and to celebrate successes. Primary activities include leveraging our many communication channels, including *Military Officer* magazine; providing best-in-class career transition, financial education, and member support programs; encouraging chapter affiliation; and delivering a robust suite of member products and services to enhance the MOAA value proposition.

OUR SPECIFIC GOALS:

- Strengthen MOAA's content across all association communication channels to drive successful outcomes for the association's Advocacy, Membership, Councils and Chapters, and Philanthropy goals and initiatives.
- Provide world-class career transition and financial benefits and education services to engage and support current members while attracting new members and encourage those in both groups to affiliate with a chapter.
- Maintain a responsive and knowledgeable Member Service Center to provide enhanced member support and to serve as an information resource for both current and prospective members.
- Offer a robust suite of exclusive products, services, and events

to enhance the MOAA value proposition and convey relevance for all membership audiences at their stage of career and life.

OUR STRATEGIES:

Overall:

- Collectively leverage the MOAA Board of Directors, the MOAA staff, the network of MOAA Council and Chapter affiliates, and an informed membership-at-large to advance the association's goals and objectives.
- Be a trusted source for information to remain a recognized expert in advocating for and contributing to the health and welfare of members of uniformed services past and present, as well as their families and survivors.
- Maximize positive engagement opportunities to maintain, diversify, and expand MOAA's membership by informing current members of the outstanding value MOAA delivers and by communicating this same value proposition to officers who have not yet become members, helping them understand MOAA's role in protecting their future benefits and those of the entire uniformed services, veteran, and surviving spouse communities.

Communications:

- Keep *Military Officer* magazine modern and diverse to broaden the publication's appeal and to gain revenue.
- Implement capabilities and user experiences on moaa.org to drive visitors of the site to stay longer and visit more pages during their sessions. This includes implementing business rules to aid in membership and revenue generation.

STRATEGIC PRIORITIES: ENGAGEMENT



- Maintain best-in-class standards for The MOAA Newsletter, continually growing the number of recipients and maintaining an open rate greater than industry standards. Use metrics and product developments to remain current.
- Deploy calls to action, multimedia, and social media to attract younger prospects and to engage members on key topics in advocacy, member benefits, chapter activities, and educational events.
- Ensure a broad range of calls to action are embedded in communications on all platforms, covering membership outreach, benefit promotion and expansion, and chapter opportunities.
- Create content in print and digital formats to support awareness of MOAA's charities, including the stories of those who have benefitted from member generosity, the variety of programs offered, and the many ways to donate.

Career transition and financial benefits and education:

- Offer exclusive programs and services, to include select career development and financial and benefits education offerings, to increase member upgrades and enhance member value.
- Present career development and financial and benefits education content — to include relevant topics from the association's advocacy agenda, along with value-added member services and special events — to enhance brand awareness and

- increase family engagement to attract and retain members.
- Maintain a robust events calendar of education services and programs supporting career transition as well as financial and benefits education, all backed by a multichannel promotion campaign, and ultimately increase participation in these events.

Member Services:

- Measure and track Member Service Center interactions, ensuring member experiences remain positive and satisfactory, including responses to email inquiries within 24 hours.
- Advance means of interaction through mobile and website platforms.

Products, services, and events:

- Research, evaluate, and implement best-in-class products and programs that offer innovative, tiered benefits with relevant and personalized value for a diverse audience of current and prospective members and their families.
- Leverage access to benefits to differentiate the value for each of MOAA's three membership categories to drive upgrades. This includes civilian career development and financial and benefits education support.
- Work with affinity partners to streamline online experiences and enhance data collection efforts for greater analytic insights about member behaviors when engaging with our partners.

STRATEGIC PRIORITIES: RESOURCES



The **RESOURCES** strategic priority goal, through good governance and strategic planning, is to secure the required financial, human capital, technology, and infrastructure elements as a cross-cutting foundation directly supporting MOAA's encompassing priorities and missions. Resources fuel the association and drive successful outcomes across the enterprise. When responsibly achieved, they position MOAA to thrive in the near and long term.

OUR SPECIFIC GOALS:

- Our overall Governance and Strategic Planning goal is to ensure good governance of the Board across its fiduciary and legal responsibilities, provide program oversight, and provide the Board an informed, engaged, effective, and forward-looking focus on MOAA's mission accomplishment.
- Our overall financial goal is to enable the success of MOAA's many vital programs, and to serve as prudent and effective stewards of MOAA's financial resources. MOAA relies on disciplined and professional financial management to meet its core funding needs, to provide the resilience needed to withstand adverse economic conditions, and to maintain strategic flexibility.
- Our human capital goal is to recruit and retain people with the skill sets MOAA requires for its rapidly changing environment.
- Our technology goal is to both leverage and optimize MOAA's investment in technology by increasing work efficiency and effectiveness across the organization while protecting our critical systems and sensitive data.
- Our infrastructure goal is to efficiently utilize MOAA's headquarters building to enhance collaboration, optimize space utilization, and maintain excellent physical working conditions.

OUR STRATEGIES:

Governance and Strategic Planning:

- Develop and implement sound governance policies and procedures for the Board of Directors, ensuring all voices are heard and have an equal opportunity to influence board policies and strategic planning goals.
- Ensure the MOAA Board of Directors are capable, diverse, enthusiastic, fully oriented, and informed members who are selected on the basis of merit and are fully engaged in advancing MOAA's programs and initiatives through effective and efficient corporate governance and planning processes.
- Continuously assess MOAA's business practices and activities to mitigate risk of loss to MOAA's resources and reputation.
- Monitor the board's effectiveness through regular self-assessments — testing the board's knowledge of MOAA's programs and priorities, revenue constraints, and its external operating environment.
- Monitor the degree to which board members have the knowledge and experience to guide MOAA as it prepares for future challenges. Identify any areas requiring additional education and training, particularly in the areas of financial management and membership development.
- Maintain a five-year Strategic Plan, and its associated metrics, as a living document that is continuously reviewed, referenced, and refreshed by the Board and the MOAA staff.

Financial:

- Continue to grow our investment portfolio to meet long term financial needs faced by MOAA, the MOAA Scholarship Fund, and The MOAA Foundation.
- Continue to focus on reducing our dependence on investment

STRATEGIC PRIORITIES: RESOURCES



- income to balance our operating budget.
- Provide both oversight of our investment portfolio advisers and timely updates to MOAA's Investment Committee.
 - Explore creating new strategic alliances — win-win opportunities with other organizations — enabling us to increase revenue, reduce expenses, or do both through collaboration and partnership.
 - Work with all business units to identify non-dues revenue opportunities not otherwise included in this plan, including digital advertising income, events, royalties, and e-commerce.
 - Evaluate and control future expenditures in a strategic manner to meet operational needs and remain within board-approved budgeted portfolio investment return targets.
 - Upgrade our financial management systems and accounting procedures, including our internal controls, to streamline and manage our resources more efficiently.

Human Capital:

- Continue to review and enhance our policies and procedures — especially our employee recognition, compensation, and performance appraisals — to enhance effectiveness and efficiency in the workforce.
- Significantly increase the extent and effectiveness of collaborative working across the whole staff.
- Continue developing training and professional development plans and programs for all staff.
- Recognize and integrate diversity and inclusion into MOAA's HR processes.

- Build a culture where employees are encouraged to seek and exploit opportunities for innovation, including small incremental gains, breakthroughs, and potential game-changing ideas.

Technology:

- Ensure MOAA's association management software and other third-party solutions provide the most cost-effective and adaptable means of capturing and maintaining data and managing our relationships and communications with members.
- Review and apply new technology across all of MOAA's workflows and business processes continually, with the goal of measurable improvements in efficiency and cost reduction.
- Leverage technology to deliver and enhance MOAA's member value proposition and allow members and potential members to consume and interact with MOAA's content in a secure, efficient, and engaging manner.
- Maintain cybersecurity protocols across the MOAA information technology enterprise.

Infrastructure:

- Optimize the use of MOAA's capital assets, facility, and equipment through comprehensive planning and a commitment to preventative and routine maintenance to extend service life and maximize value.
- Evaluate future opportunities to utilize the infrastructure to develop possible non-dues revenue resources.

CONCLUSION



MOAA has gained universal recognition for its advocacy successes, and we remain committed to that goal. As organizations across our nation are challenged with membership growth and revenue, MOAA finds itself in a unique situation in which our strategic goals can contribute immeasurably to

both these areas and provide the foundations that appeal to our newest generation of servicemembers and veterans. We firmly believe this plan complements our over-arching goal: Never Stop Serving.



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