North Carolina Council of Chapters BOOT CAMP

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President, NCCOC

Boot Camp

Council and Chapter Leadership

- Today's Objectives
  - Compare our military leadership skill set with skills needed to lead a MOAA organization.
  - Identify tools that can be helpful to you in your leadership position.
  - Share best practices currently used in your chapter. What are your top chapter needs now?
  - What can we do as a Council team to enhance your /our operations?

How Teams Work – Understanding the Process

- Think about these dynamics as being similar in every type of “team”!

- First they FORM
- Then they STORM
- Then they NORM
- And finally, they PERFORM!

- Understand, nurture and celebrate !

Leadership Teams

- All must present a united front to the membership.
- All must be seen as leaders.
- All must be visible to the organization.
- Must lend expertise to each other.
- That expertise must be respected and valued.
- Everyone on the team is probably at a different place on the corporate learning curve.
- Must have a clear direction/vision
- All must believe that the people served by the Team are the most valuable assets to the organization.

Principles of Leadership

- Know yourself and seek self-improvement.
- Be technically and tactically proficient.
- Seek and take responsibility.
- Make sound and timely decisions.
- Set the example.
- Know your soldiers and look out for their well being
- Keep soldiers informed.
- Develop a sense of responsibility in your subordinates.
- Ensure the task is understood, supervised & accomplished.
- Build the Team.
- Employ your unit IAW its capabilities.

Leadership Skills Needed Today

- Providing direction and leading by example.
- Values, Spirit and Soul.
- Communicating a strategy.
- Building teams.
- Tearing down walls and barriers.
- Adding value to the organization.
- Constant learning and unlearning.
- Comfortable with *creating* change.
- Managing and *selling* ideas.
- Creating a *charged* environment.

Leading Change By Dr. John P. Kotter

- Establish a sense of urgency.
- Create the Guiding Coalition.
- Develop a vision and strategy.
- Communicate the Change vision.
- Empower broad-based action.
- Create short-term wins.
- Consolidate gains and produce more change.
- Anchor new approaches in the culture.

Expectations – Yours /Mine

- Servant Leadership – primus inter pares (first among equals)
- Servant Leadership – makes sure that other people's highest priority needs are being served.
- Structure/Process/Outcome – please think about this as we talk about the Balanced Scorecard .

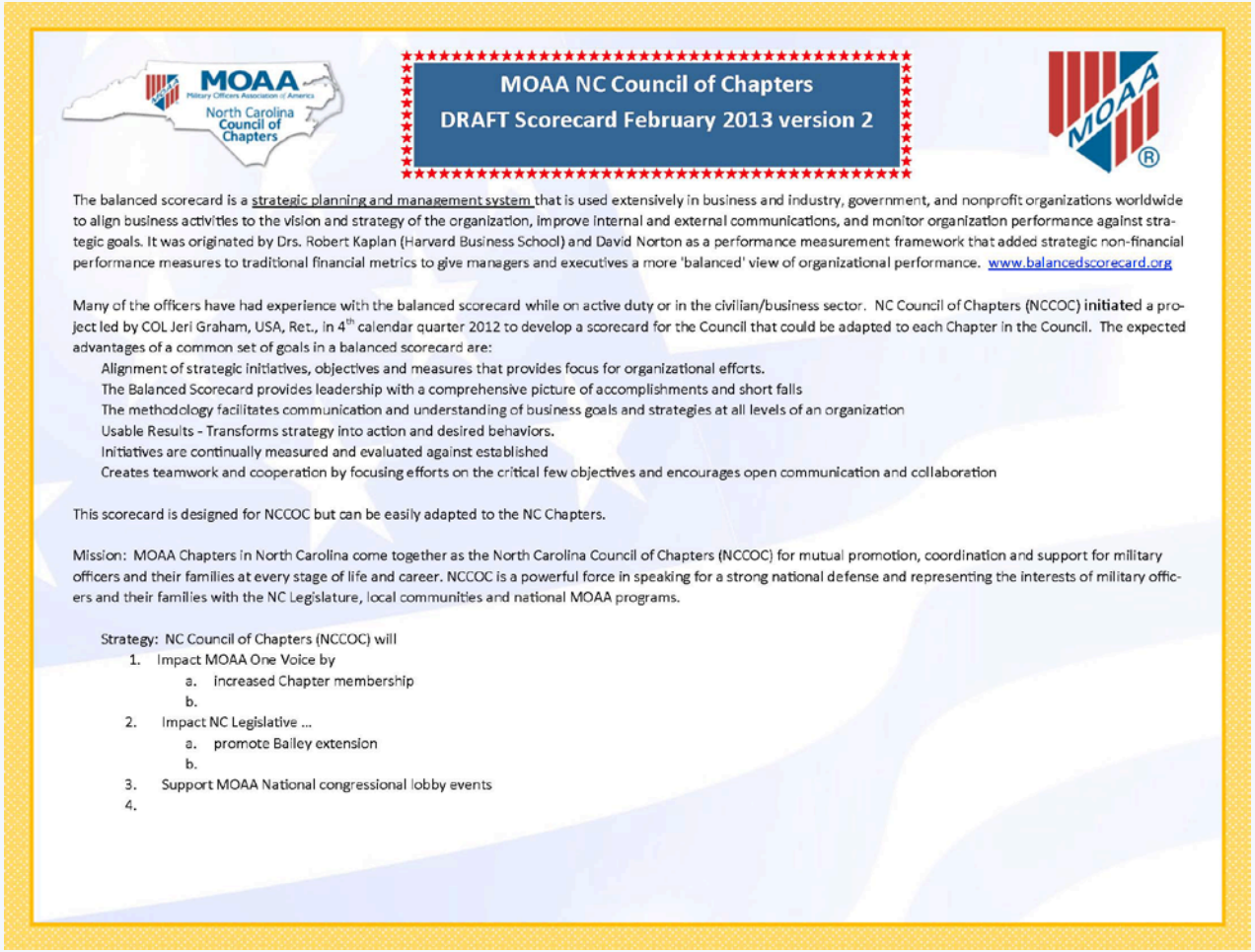
Council and Chapter Tool Box

MOAA - NC Council of Chapters NEW PRESIDENT SMART GUIDE

ITEM	Scope of Responsibility	Suspense	Source of guidance	Status - ✔ one
MOAA Council & Chapters Policy and Procedure Guide	Obtain copy from current president/or download from website	Obtain when nominated	Link here to download from MOAA website	
National MOAA - login	Obtain MOAA – login so that you have full access And encourage all members to do same	As soon as possible	Link here to go to MOAA Web and create a log-in account, or Call MOAA @ 800-234-6622 or 703-549-2311 for assistance	
National MOAA Roster	Ensure chapter roster posted on MOAA website is updated annually and with any changes (normally Chapter Secretary performs this task).	As soon as possible, but NLT February 1 of each calendar year	MOAA Council & Chapters Policy and Procedure Guide	
Chapter Roster	Ensure that NCCOC level roster is updated annually with **any changes.** Contact Council Web manager with any questions about downloadable forms.	Annually, but NLT COB of January of each calendar year	Link here for fillable Chapter Officer Roster on the NCCOC website	
Chapter Reports	Ensure that Chapter Report is submitted quarterly with information about chapter activities Contact Council Web manager with any questions about downloadable forms.	Quarterly, at least 2 weeks before the Council meeting	Link here for fillable Chapter Report on the NCCOC website	
Council and Chapter Bylaws	Review both documents. Note concerns for possible updating, as needed.	Review when nominated	Link here for NCCOC By-Laws Obtain Chapter By-Laws from Chapter secretary	
Chapter President access to Council Only Business on NCCOC Website	Obtain Council Only Business login information from outgoing president or web manager	When nominated to best prepare	E-mail NCCOC Web manager here.	
Chapter documents: Minutes from Board meetings, regular meetings, or other pertinent minutes, SOPS, etc. Meet with key chapter leaders	Review minutes to obtain highlights of issues, history, identified problems and successes. Schedule a **transition meeting** with old and new leaders in order to ensure smooth operations.	Within 30 days after assuming responsibility	MOAA Council & Chapters Policy and Procedure Guide Link here for NCCOC Chapter "Go-By" (*log-in required*)	
Council Business	Use NCCOC website as primary communication tool for meetings, information, archives, etc. Review NCCOC website.	When nominated to best prepare	NC Council website: www.moaa-nc.org Link here for website architecture review (*log-in required*)	
Council -> Chapter Support	Council officers will provide support to chapters, whenever needed	As needed, or on demand	E-mail NCCOC President here.	

Updated: ___/___/____ Updated by: _____

Council and Chapter Tool Box



MOAA NC Council of Chapters

DRAFT Scorecard February 2013 version 2

The balanced scorecard is a strategic planning and management system that is used extensively in business and industry, government, and nonprofit organizations worldwide to align business activities to the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals. It was originated by Drs. Robert Kaplan (Harvard Business School) and David Norton as a performance measurement framework that added strategic non-financial performance measures to traditional financial metrics to give managers and executives a more 'balanced' view of organizational performance. www.balancedscorecard.org

Many of the officers have had experience with the balanced scorecard while on active duty or in the civilian/business sector. NC Council of Chapters (NCCOC) initiated a project led by COL Jeri Graham, USA, Ret., in 4th calendar quarter 2012 to develop a scorecard for the Council that could be adapted to each Chapter in the Council. The expected advantages of a common set of goals in a balanced scorecard are:

- Alignment of strategic initiatives, objectives and measures that provides focus for organizational efforts.
- The Balanced Scorecard provides leadership with a comprehensive picture of accomplishments and short falls
- The methodology facilitates communication and understanding of business goals and strategies at all levels of an organization
- Usable Results - Transforms strategy into action and desired behaviors.
- Initiatives are continually measured and evaluated against established
- Creates teamwork and cooperation by focusing efforts on the critical few objectives and encourages open communication and collaboration

This scorecard is designed for NCCOC but can be easily adapted to the NC Chapters.

Mission: MOAA Chapters in North Carolina come together as the North Carolina Council of Chapters (NCCOC) for mutual promotion, coordination and support for military officers and their families at every stage of life and career. NCCOC is a powerful force in speaking for a strong national defense and representing the interests of military officers and their families with the NC Legislature, local communities and national MOAA programs.

Strategy: NC Council of Chapters (NCCOC) will

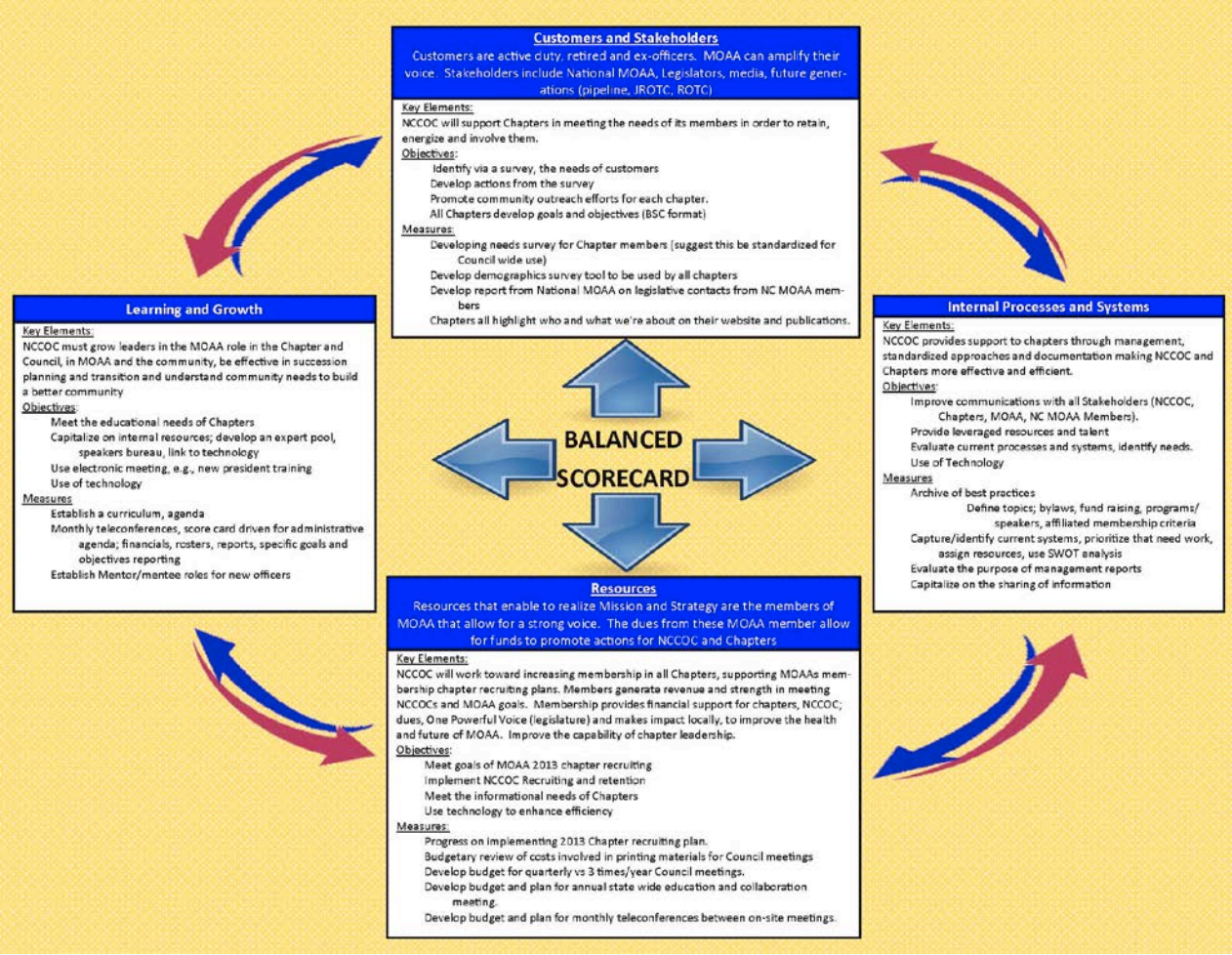
1. Impact MOAA One Voice by
   a. increased Chapter membership
   b.
2. Impact NC Legislative ...
   a. promote Bailey extension
   b.
3. Support MOAA National congressional lobby events
4.

MOAA
Military Officers Association of America
North Carolina Council of Chapters

Council and Chapter Tool Box

Customers and Stakeholders	Resources
Customers are active duty, retired and ex-officers. MOAA can amplify their voice. Stakeholders include National MOAA, Legislators, media, future generations (pipeline, JROTC, ROTC)	Resources that enable to realize Mission and Strategy are the members of MOAA that allow for a strong voice. The dues from these MOAA member allow for funds to promote actions for NCCOC and Chapters
Key Elements: NCCOC will support Chapters in meeting the needs of its members in order to retain, energize and involve them. Objectives: Identify via a survey, the needs of customers Develop actions from the survey Promote community outreach efforts for each chapter. All Chapters develop goals and objectives (BSC format) Measures: Developing needs survey for Chapter members (suggest this be standardized for Council wide use) Develop demographics survey tool to be used by all chapters Develop report from National MOAA on legislative contacts from NC MOAA members Chapters all highlight who and what we're about on their website and publications.	Key Elements: NCCOC will work toward increasing membership in all Chapters, supporting MOAAs membership chapter recruiting plans. Members generate revenue and strength in meeting NCCOCs and MOAA goals. Membership provides financial support for chapters, NCCOC; dues, One Powerful Voice (legislature) and makes impact locally, to improve the health and future of MOAA. Improve the capability of chapter leadership. Objectives: Meet goals of MOAA 2013 chapter recruiting Implement NCCOC Recruiting and retention Meet the informational needs of Chapters Use technology to enhance efficiency Measures: Progress on implementing 2013 Chapter recruiting plan. Budgetary review of costs involved in printing materials for Council meetings Develop budget for quarterly vs 3 times/year Council meetings. Develop budget and plan for annual state wide education and collaboration meeting. Develop budget and plan for monthly teleconferences between on-site meetings.
Internal Processes and Systems	**Learning and Growth**
Key Elements: NCCOC provides support to chapters through management, standardized approaches and documentation making NCCOC and Chapters more effective and efficient. Objectives: Improve communications with all Stakeholders (NCCOC, Chapters, MOAA, NC MOAA Members). Provide leveraged resources and talent Evaluate current processes and systems, identify needs. Use of Technology Measures Archive of best practices Define topics; bylaws, fund raising, programs/speakers, affiliated membership criteria Capture/identify current systems, prioritize that need work, assign resources, use SWOT analysis Evaluate the purpose of management reports Capitalize on the sharing of information	Key Elements: NCCOC must grow leaders in the MOAA role in the Chapter and Council, in MOAA and the community, be effective in succession planning and transition and understand community needs to build a better community Objectives: Meet the educational needs of Chapters Capitalize on internal resources; develop an expert pool, speakers bureau, link to technology Use electronic meeting, e.g., new president training Use of technology Measures Establish a curriculum, agenda Monthly teleconferences, score card driven for administrative agenda; financials, rosters, reports, specific goals and objectives reporting Establish Mentor/mentee roles for new officers

Council and Chapter Tool Box



Who Does What?

- Council "Go By " – Developed to provide the structure to your chapter. Doug has taken the National MOAA Policy/Procedure book and made it very adaptable.
- The SENLAND Organizational Chart gives the visual picture of who does what and also helps new leaders to have an overall view.

MOAA
Military Officers Association of America
North Carolina Council of Chapters

Our seasoned leaders respond… Team Time……

- What were your biggest challenges when taking over as President?
- What's your best advice to new leaders?
- If you had to do it over again, what would you do differently, better?
- Who do you turn to for advice? Support?
- How do you balance chapter needs/desires?

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Help! No one works FOR me… Everyone is a VOLUNTEER!!!

- What are your recommendations for working with an entirely volunteer team?
- How do you recognize your team? More than a pin or certificate?
- What do volunteers want out of your organization?
- How do spouses, auxiliary members participate? Do you bylaws reflect that potential?