

# May, 2014 NCCOC “Boot Camp” Durham

## Membership and Chapter Recruiting



**CAPT David Lee, USNR-Ret**  
**COL Al Schroetel, USA, Retired**

### PURPOSE:

- UPDATE ON NCCOC MEMBERSHIP STATUS
- REVIEW 2014 MOAA NAT’L MEMBERSHIP PROGRAM
- SENCLAND STRATEGIES; “WHAT WORKS”



January 1, 2014

Dear Chapter President:

Please join us in the 2014 Chapter Recruiting Program. You'll be part of MOAA's nationwide campaign to build chapter membership. Last year chapters recruited over 2,200 new incentive-qualified chapter members. With your help, 2014 will be an even bigger success—and we have some great incentives to help you get more members.

Based on your input and lessons learned from the field, we have made some refinements to the incentives for both recruiting and retaining our chapter members. Chapter Recruiting 2014 still focuses on recruiting new chapter members — the lifeblood of our chapters as we move forward. For every new incentive-qualified chapter member your chapter recruits between January 1 and December 31, 2014, you'll receive \$10 or more if they are a new PREMIUM or LIFE MOAA member with a qualified voucher.

To get you started, we're sending you this 2014 Chapter Recruitment Kit in which you'll find all the tips and tools you'll need to launch an effective recruiting campaign. We will also be sending you the latest recruitment lists early in 2014, which will help in your efforts. We hope you will look this package over, and then pass it to your membership chair so he/she can get started.

Thank you for all you do. We know working this program is challenging. We appreciate your continued support of the 2014 Chapter Recruiting Program as we work together to gain vital new chapter members while retaining our current chapter members.

Respectfully,

Barry Wright

Colonel, U.S. Army (Ret)

Director, Council and Chapter Affairs

# MOAA Chapter Recruiting Campaign

Chapter Recruiting 2014 provides a single effort to recruit new chapter members. The ultimate goal for MOAA is to remain the premier military advocacy organization that can affect legislation and make 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. We must focus our resources on recruiting chapter members or risk the continued decline and weakening of our chapter system.

MOAA has 380,000 members.  
There are 410 MOAA Chapters with 57,000 members.  
15% of MOAA members are in a Chapter



# MOAA Membership: 2013 Results, 2014 Expectations



- Recruiting Chapter Members
  - 2013: exceeded goal of 2000, added 2556
  - 2014: goal of 3000, to date have 150

Note: Not all qualify as MOAA Chapter members
- 50 Chapters qualified for 2013 retention incentive of \$250
  - Retain 95 percent or more of members, as determined by national MOAA
- 2014 Incentive Award
  - \$500 to retain 90 percent of your chapter members from the 2013 roster submission (see worksheet under Retention Incentives)
  - Must have met both the Mar 15, 2013 date for the roster submission and Feb 1, 2014 date for your new roster submission to national MOAA
- Incentive Program starts 2<sup>nd</sup> quarter (1Apr), allows admin time for MOAA

Note: There are other incentives for 100+ new members and for top councils in each of four regions. See web site for more details.



# Chapter Recruiting 2014

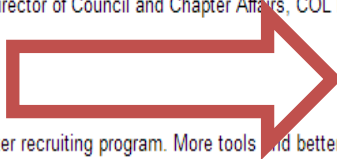
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Meeting the membership challenge by helping chapters recruiting more chapter members is a top priority for MOAA. Chapter Recruiting 2014 focuses on chapter membership vice national membership.



## Letter from COL. Barry Wright, USA (Ret)

A personal message about Chapter Recruiting 2014 from MOAA's director of Council and Chapter Affairs, COL Barry Wright, USA (Ret).



## What is Chapter Recruiting 2014?

Chapter Recruiting 2014 is MOAA's new nationally sponsored chapter recruiting program. More tools and better information to chapters will help recruit chapter members more effectively.

[http://www.moaa.org/chapterrecruiting/  
Recruiting Materials](http://www.moaa.org/chapterrecruiting/Recruiting_Materials)

To help with your recruiting efforts, we have provided tools and materials for your use. Also included are frequently asked questions, program awards and incentives, success stories and instructions on how to work your potential-member lists.

# Chapter Recruitment 2014

## Members Recruited as of 01May2014

Chapter Category	Chapter Code	Chapter Name	Chapter Members Added	Receiving Incentives for
Category - 01 (1 to 49)				
Category - 02 (50 to 74)	NC04	Charlotte-Metrolina	19	12
Category - 03 (75 to 99)				
Category - 04 (100 to 120)				
Category - 05 (121 to 149)	NC02	Coastal Carolina	2	0
Category - 06 (150 to 199)				
Category - 07 (200 to 249)				
Category - 08 (250 to 299)	NC01	Cape Fear	4	1
	NC07	Southeastern NC	11	7
Category - 09 (300 to 499)	NC06	Sandhills	1	1



Source MOAA Website; Tracker , Chapter Recruiting 2014



# Important Dates MOAA Membership



## Action

- 2014 New Members
- Recruiting Member Lists
- Chapter Officer Update
- Chapter Roster Submission

## Timing

- Immediately, as soon as they are recruited
- Sent from MOAA early spring with follow-up in summer and fall
- Annually (mid-March) or when changes occur
- During 1<sup>st</sup> quarter

# MOAA Membership



- For your new chapter members that are not MOAA members
- Three membership levels
  - Basic, on-line, limited products, no mailed magazine, no cost, 3 year limit unless  $\leq 35$  yrs old
  - Premium, full benefits, mailed magazine, 1 yr @ \$37, 2 yrs @ \$72, 3 yrs @ \$95
  - Life, full benefits, depends on your age, \$450 +/-

See Chapter Recruiting Brochure in your handouts

# Recruiting Materials

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To help with your recruiting efforts, we have provided tools and materials for your use. Also included are frequently asked questions, program awards and incentives, success stories and instructions on how to work your potential-member lists.

## Why Should You Join?

MOAA members have access to services specifically designed for them.

Join today

## Membership Applications and Brochures

Download and print membership applications and brochures to use when recruiting new members.

## Chapter Recruiting Awards and Incentives

Review incentives for councils, chapters, and individual recruiters.

## Chapter Advertising

MOAA is providing two chapter ads that can be placed in local newspapers.

## Online Chapter Membership Dues Join and Renewal

This new online chapter membership dues collection tool has been created to help assist with chapter member joins and renewals. National MOAA is pleased to provide you with this opportunity to collect your chapter membership dues at no cost to your chapter.

## Frequently Asked Questions

Find answers to your questions about Chapter Recruiting 2014 here.

## How to Recruit Chapter Members – Tips From the Field

Learn effective recruiting strategies from chapters successful in recruiting new chapter members.

## How to Work Recruiting-Member Lists

Find out how top recruiters/membership chairs work their potential-member lists effectively.

## Excel Tutorial For Recruiting Lists

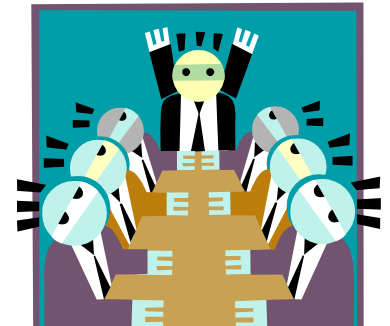
Colonel Robert Black USAF (Ret), Past President of the Great Plains Chapter, SD put together this useful tutorial to help you work excel lists.

## Reporting of Chapter Member Gains

# Membership and Chapter Recruiting

- Actively Recruit New Members
- When You Get New Members
  - Report New Chapter Members On-line
  - Sign them up for MOAA Membership – Basic Membership is FREE
- Take Advantage of MOAA & USAA incentives

QUESTIONS?



# SENCLAND MOAA Recruiting

*17 May 2014*

NC Council of Chapters



# Elements of a Successful Campaign

- Interesting programs and activities
- Chapter Visibility
- Involve all members in recruiting
- Make guests welcome
- Use National MOAA potential recruit lists
- Contact & follow-up

# Interesting Programs and Activities

- Luncheons or dinners with speakers
  - Issues of broad interest
  - More than just military
  - Best speakers you can get (colleges, recent news coverage, etc.)
- “Field Trip” luncheons
  - Trip with a catered lunch
  - Examples:
    - Civil war sites and re-enactments
    - Art galleries & exhibits
    - Historical sites

# Chapter Visibility

- Website
- Newspaper announcements of meetings
- Media coverage of activities
  - Scholarship awards
  - Support to veterans
- Newsletter

# Everyone a Recruiter

- Involve all members in recruiting
- Service Directors' job description includes "recruiting"
- Recognize top recruiters

# Make Guests Welcome

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- Welcome them at the door
- During the meeting introduce them and ask for a short recap
- Let them know how to join

# National MOAA Potential Recruit Lists

- Sent to Chapter President and Membership Chair
  - About twice a year
  - National members who are not affiliated with local chapter
- Send them an e-mail with:
  - a welcome
  - Info about upcoming meetings
  - Link to website
- Sample text

# Sample e-mail Invitation

Periodically the MOAA National Headquarters sends local Chapters a list of MOAA members who have indicated an interest in affiliating with a local chapter.

In this case, we are the Southeastern NC (SENCLAND) Chapter serving the entire Cape Fear Region. We hold monthly meetings from September to June of each year. Most of these meetings are at the Bluewater Restaurant in Wrightsville Beach, but we also have at least one meeting each year at Oak Island and one in Surf City.

I encourage you to look at our Chapter Website <http://www.sencland.org/> for a bit more information about our Chapter. I have also attached a copy of our April Newsletter.

We hope you will come to a future luncheon. Our next one is at the Bluewater on Tuesday, April 1st at 11:30AM at the Bluewater Grill Restaurant on Wrightsville Beach. Menu: Choice of entrees, beverages and cookies for \$15

Our guest speaker will be Mr. Cort Barnes, one of the hostages during the 444 day Iranian siege of the American Embassy in Tehran. If you would like to attend this luncheon, please RSVP to JoAnn Doleman at : [jdoleman522@gmail.com](mailto:jdoleman522@gmail.com)

If you are not able to attend this luncheon, here is information on upcoming luncheons:

- May 6th: (Oak Island) – State Senator Bill Rabon
- June 6th: (Hugh MacRae Park in Wilmington ) Annual Pig Pickin' and ROTC Scholarship Awards
- July and August – no meetings

Should you decide to join our Chapter the annual dues (\$15) are waived for the rest of the calendar year in which you join.

If you have any questions about our Chapter please call me (910-686-6905) or e-mail me.

I look forward to meeting you soon.

Al Schroetel  
Membership Chair.

# Contact & Follow-up

- E-mail: "Hope Your Enjoyed...etc.
- Sample text:

*We are pleased that you have joined our local chapter of the Military Officers Association of America (MOAA)*

*The SENCLAND Chapter is one of the largest in North Carolina and certainly the most active.*

*We hold most of our monthly luncheons at the Bluewater restaurant on Wrightsville Beach, but because our Chapter's region goes from Camp LeJeune to the SC Border, we hold one luncheon each year in the "north" in Hampstead and one in the "south" at Oak Island. The May 6th Luncheon will be at the Island Way Restaurant, 1407 E. Beach Dr., Oak Island. This is a very nice restaurant overlooking the ocean.*

*I have attached a copy of our May Newsletter (which includes more details about the May luncheon).*

*A copy of the May Newsletter is also posted on our website (<http://www.sencland.org/>)*

*Please call me at 910-686-6905 or respond to this e-mail if you have any questions.*

*I look forward to seeing you again at a future Chapter luncheon or event*

*Al Schroetel  
Membership Chair.*



# May, 2014 NCCOC “Boot Camp” Durham

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**CAPT David Lee, USNR-Ret**  
**COL Al Schroetel, USA, Retired**

### PURPOSE:

- UPDATE ON NCCOC MEMBERSHIP STATUS
- REVIEW 2014 MOAA NAT'L MEMBERSHIP PROGRAM
- SENCLAND STRATEGIES; “WHAT WORKS”

<b>Customers and Stakeholders</b> Customers are active duty, retired and ex-officers. MOAA can amplify their voice. Stakeholders include National MOAA, Legislators, media, future generations (pipeline, JROTC, ROTC)	<b>Resources</b> 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
<p><u>Key Elements:</u> NCCOC will support Chapters in meeting the needs of its members in order to retain, energize and involve them.</p> <p><u>Objectives:</u> 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)</p> <p><u>Measures:</u> 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.</p>	<p><u>Key Elements:</u> 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.</p> <p><u>Objectives:</u> Meet goals of MOAA 2013 chapter recruiting Implement NCCOC Recruiting and retention Meet the informational needs of Chapters Use technology to enhance efficiency</p> <p><u>Measures:</u> 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.</p>
<b>Internal Processes and Systems</b>	<b>Learning and Growth</b>
<p><u>Key Elements:</u> NCCOC provides support to chapters through management, standardized approaches and documentation making NCCOC and Chapters more effective and efficient.</p> <p><u>Objectives:</u> 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</p> <p><u>Measures</u> 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</p>	<p><u>Key Elements:</u> 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</p> <p><u>Objectives:</u> 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</p> <p><u>Measures</u> 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</p>



# Customers and Stakeholders

Customers are active duty, retired and ex-officers. MOAA can amplify their voice. Stakeholders include National MOA, legislators, media, future generations (pipeline; JROTC, ROTC)

## Key Elements:

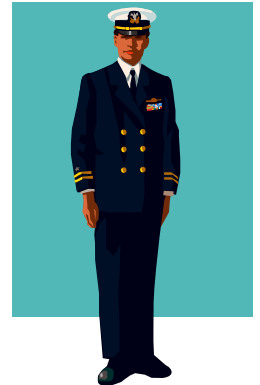
NCCOC will support Chapters in meeting the needs of its members in order to retain, energize and involve them.

## Objectives:

- Identify via a survey, the need of the customers
- Develop actions from the survey
- Promote community outreach efforts for each Chapter
- Chapters develop Goals and Objectives (BSC format)

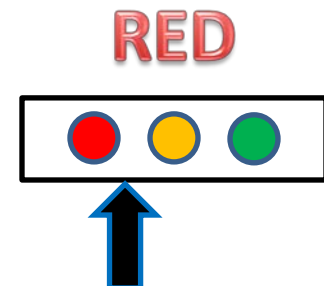
## Measures:

- Develop a Needs Survey for Chapter Members (standardized)
- Develop demographic Survey tool for all Chapters
- Develop report on Legislative contacts from NCCOC members
- Chapters all highlight who and what we are on web sites and publications



## Status:

- Survey tool identified
- Legislative contacts assigned



# Resources

Resources that enable Mission and Strategy realization are members of MOAA that allow for a strong voice. The dues from these MOAA members allow for funds to promote actions for NCCOC and Chapters

## Key Elements:

NCCOC will work toward increasing membership in all Chapters, supporting MOAAs membership chapter recruiting plans. Members generate revenue and strength in meeting 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 recruiting
- Implement NCCOC Recruiting and Retention
- Meet the information needs of the Chapters
- Use technology to enhance efficiency

## Measures:

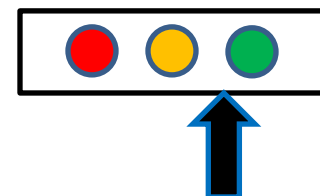
- Progress on implementing 2013 Chapter Recruiting Plan
- Budgetary Review of costs involved in printing materials for Council Meetings
- Develop budget for quarterly vs 3 times a year Council Meetings
- Develop budget and plan for annual state wide education and collaboration meeting
- Develop budget and plan for monthly teleconferences between on-site meetings

## Status:

- Chapter Recruiting Plan implemented
- Conference calls in place between meetings
- Meeting documents distributed electronically



GREEN



# Internal Processes and Systems

## Key Elements:

NCCOC provides support to Chapters through management, standardized approaches and documentation, making NCCOC and Chapters more effective and efficient.

## Objectives:

- Improve communication with all stakeholders (NCCOC, Chapters, MOAA, NC MOAA members)
- Provide leveraged resources and talent
- Evaluate current processes and systems and identify needs
- Use of technology

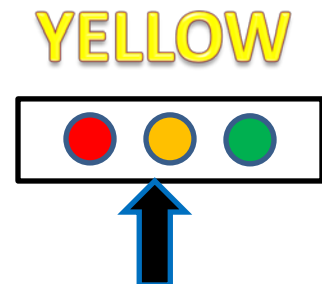
## Measures:

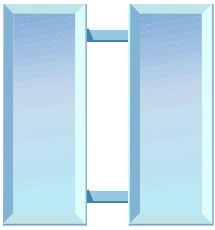
- Archive of best practices;
  - define topics; by-laws, fund raising, programs/speakers, affiliated membership criteria
- Capture/identify current systems, prioritize that that need work, assign resources, use SWOT analysis
- Evaluate the propose of management reports
- Capitalize on the sharing of information



## Status:

- Boot camp training held May 2014
- Conference calls for all NCCOC and Chapter leaders





# Learning and Growth

## Key Elements:

NCCOC must grow leaders in the MOAA role in the Chapter and Council, in MOMAA 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 admin agenda; financials, rosters, reports, specific goals and objectives reporting

Establish mentor/mentee roles for new officers

## Status:

Boot camp training held May 2014

Conference calls for all NCCOC and Chapter leaders

**YELLOW**



# Simplified Chapter Goals

1. Increase membership by 10% per year.
2. Increase MOAA membership
3. Implement MOAA Membership program
4. Submit for 4/5 Star Chapter
5. Expand Outreach
6. Publish bi-monthly newsletter
7. Get one article per year published in the Salisbury Post
8. Attend all NCCOC Meetings

