

MOAA ALAMO CHAPTER 2018 ACTION PLAN SCORECARD

PRIORITY 1: Sustain Strong & Influential Legislative Efforts/Programs

Goal: Visit with every constituent legislator at least annually.

Action Items/Steps	Point Person(s)	Status
1.1 Legislative outreach teams continue to make visits to legislators; and invite legislators to our chapter functions. Visit reports to be included in The Lariat.	Robert Blake & Ed Marvin	Chapter "Aspirational Goal Team" coordinating with State representatives. Col Marvin met with US Representative Doggett reviewing concerns.
1.2 Educate membership on how to advocate using Endeavor/CapWhiz.		Article included in Lariat discussing the response to issues. Identified TX16 as the code to use to identify Alamo Chapter when responding.

PRIORITY 2: Increase and Retain Membership

Goal: By Dec 31, 2018 grow Chapter membership to 1700.

Members Added Q1: 27

Members Deleted Q1: 42 (35 Non pymt, 7 deceased)

Action Items/Steps	Point Person(s)	Status
2.1 Focus on "catchment area" targeted recruiting: <ul style="list-style-type: none"> • Use the MOAA ZIP code alignment list to target high military populated areas (Corpus, Del Rio & the Valley.) • Where feasible, visit these areas with goal of getting them to start new MOAA Chapter. 	Cunningham & Staff	Maj Cunningham reaching out to local reps when visiting South Texas ROTC/JROTC units during Spring award presentations.
2.2 Include as a discussion topic at each staff meeting to study and recommend action steps on "how to get more chapter members involved".	Meyers & Marvin	Recurring agenda item is "What has the Chapter Done for You Lately" at each staff

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		meeting. Items included as feature article in Lariat.
2.3 Pursue automatic free membership for new residents at Blue Skies and ARC.	Cunningham & Patrick	May 2018: CLOSED/NOT FEASIBLE. After meeting with, Ilene Kitchens, Blue Skies Marketing, it was decided that this was not doable. Automatic free membership entails capturing the new residents email automatically, which Blue Skies cannot/would not provide. It was decided to keep system the way it is, i.e., include membership letter in new resident orientation. All this equally applies to the ARC.
2.4 Fill staff vacancies, i.e., Secretary, President Elect, and a “Buddy” for each position.	Meyers & staff	Ongoing discussion item at staff meetings.
2.5 Create social media presence with Twitter and/or Facebook.	Poole	

PRIORITY 3: Conduct Top Quality Monthly Programs/Events

Goal: Events, overall, will be in the “black” with a focus on generating revenue; increase attendance to at least 100+ attendees/event.

Action Items/Steps	Point Person(s)	Status
3.1 Lock in all events with presenters at least 6-months in advance (ideally have an annual program calendar ready by Jan 1 of each year).	Patrick	May 2018: COMPLETED

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PRIORITY 5: Austin

Goal: Resurrect Austin Chapter as a satellite until they are able to be self-sustaining

Action Items/Steps	Point Person(s)	Status
5.1 Meet with Austin Chapter leaders to determine status of Austin Chapter	Meyers / Cunningham	Action accomplished Feb 28, 2018
5.2 Identify key stakeholders and principles of the Austin Chapter and meet to discuss alternatives to closing chapter.	Meyers / Cunningham	Action accomplished Feb 28, 2018. None available.
5.3 Meet with community leaders, to include TMOA, TCC and TX Centex to determine lead and course of action	Meyers / Cunningham / Patrick	Action accomplished Feb 28, 2018. Met with TMOA executive director. Interested in collaborating. Proposal provided by JC on Mar 2, 2018. Attend March and April TMOA networking mixers. Action: continued attendance to create satellite affiliate contingent.
5.4 Communicate with MOAA National Chapter & Council Affairs to coordinate course of action	Cunningham	Accomplished.
5.5 Meet monthly to determine financial obligations, tax filing status, debts and liquidity of assets to include scholarship funds	Meyers / Cunningham / Caudill	Austin Chapter Scholarship monies transferred from 501(c)3 to Alamo 501(c)3 in March 2018.
5.6 Identify cost estimates and budget for the transition process for the Austin Chapter and identify sources of additional cost offset.	Meyers / Caudill	
5.7 File necessary application for affiliate/satellite status to State of Texas, MOAA National.	Meyers / Cunningham	Template format requested from MOAA for establishing satellites. Awaiting response.
5.8 Identify potential risks and mitigations with Scholarship Funds prior to assumption of transfer with legal.	Meyers	Done