



LUKE CHAPTER MOAA

Military Officers Association of America, PO Box 5072, Sun City West, Arizona 85376-5072

Luke Chapter MOAA Strategic Plan 2024-2029

This revised Strategic Plan was presented to the Board of Directors prior to its regular Board Meeting on May 6, 2024. The Board voted at that May 6, 2024 meeting to approve unanimously the document as finalized below. The Strategic Plan shall be posted to the Chapter website with the Board's approval.

/s/ Eugene Wikle

Eugene Wikle, MAJ, USAF (R)
President

/s/ Mike Kramer

Mike Kramer, COL, USAFR (R)
Secretary

Introduction

The Luke Chapter, Military Officers Association of America (Luke Chapter MOAA) is a nonprofit IRS Section 501(c)(19) veterans' organization, operated for purposes beneficial to the interests of its members, veterans, military personnel, their families, and their survivors. The Luke Chapter MOAA is formed to advocate for the military service-earned benefits and foster a bond of friendship and camaraderie among all Chapter members (stakeholders) while continuing to serve the community, state, and country.

History

The Luke Chapter MOAA was chartered on January 17, 1980, as the Sun City West Chapter, an Affiliate of The Retired Officers Association. The Chapter was organized as a nonprofit corporation under the laws of Arizona on November 2, 1982 and approved by the Internal Revenue Service as a 501(c)(19) tax-exempt veteran's organization on April 9, 1993. Subsequently, the Chapter name was changed on March 16, 1998 from the Sun City West Chapter to Luke Chapter, The Retired Officers Association (TROA). On December 5, 2002, the Board of Directors changed the name for operating purposes from Luke Chapter, TROA to Luke Chapter Military Officers Association of America (MOAA). This name change was formally approved for legal purposes by the Arizona Corporation Commission on May 1, 2015.

Luke Chapter MOAA Strategic Plan (2024-2029)

Vision

The Luke Chapter MOAA shall be a leading advocate of military-related issues for its members and for all West Valley active duty, reserve, retired and veterans of all eight uniformed services and for their families and their survivors.

Mission

The mission of Luke Chapter MOAA is to powerfully advocate for the earned benefits of those who served in uniform; to perpetuate the traditions and values of the American military; to undertake charitable and informative, social and similar events; to support legislation favorable and beneficial to members, spouses and survivors of all military personnel; to interact and partner with civilian leaders and members of our local communities; and to work with our members and selected veterans organizations, as we collectively work to attain Luke Chapter MOAA and national MOAA goals and objectives. Luke Chapter MOAA is nonpartisan in all activities. Fund Raising, Scholarship, and Veteran Support are also addressed in the mission of the Luke Chapter MOAA Community Fund, Inc., a single member, IRS Section 501(c)(3) public charity, which is a subsidiary organization of Luke Chapter MOAA.

Values

Luke Chapter MOAA values are expressed by our commitment to our motto “Never Stop Serving” and articulated through tenets of officership and military traditions: duty, honor, country, integrity, professionalism, leadership, selfless service, and excellence.

General Goals

The following goals support the Luke Chapter MOAA vision, and mission:

- i. To serve the Arizona veteran and military communities;**
- ii. To enhance awareness of, and the importance of, the Luke Chapter MOAA and national MOAA organizations across its membership and the Phoenix West Valley communities;**
- iii. To conduct and develop timely and appropriate Luke Chapter programs and activities throughout the Phoenix Valley area which are innovative, interesting and service-oriented;**
- iv. To acquire and maintain the financial and other resources needed to accomplish stated goals and objectives;**
- v. To grow Chapter membership each year through an aggressive recruiting plan which incorporates the unique and diverse segments within Luke Chapter’s membership; and**
- vi. To support and foster a bond of friendship and camaraderie among Luke Chapter members.**

Action Plan with Specific Goals

Goal realization requires that the Luke Chapter acquire and maintain the necessary financial, labor, talent and other resources. Each of the following specific goals incorporates objectives that provide specificity, measures, actions, and time frames.

i. To serve the Arizona Veteran and Military Communities.

a. Ensure representation and/or participation in the Northwest Valley Veterans Association, the Fighter Country Partnership, and other veteran and veteran support organizations in the community.

b. Meet at least annually with Arizona MOAA Council assigned Senator(s) and/or Legislative District US Congress person(s) to inform and request support for National MOAA annual objectives and periodically invite Arizona Senators and Representatives to Chapter meetings.

c. Support veterans' issues at the State legislature by calling, writing letters, and testifying as appropriate.

d. Inform Chapter members of national and state veteran issues by having at least six articles in the NewsGram and periodic BLAST emails.

e. Conduct an annual Thanksgiving food drive for deserving military personnel at Luke AFB and a Toys for Tots collection at the December meeting each year.

f. Promote and assist a strong JROTC program.

g. Provide oversight and guidance to the Luke Chapter, MOAA Community Fund, and appoint directors to the Board of Directors, as needed.

ii. To enhance and promote the image of the Luke Chapter.

a. Maintain a public presence through a professional and up-to-date website and other social media as appropriate which will lead to a five-star award from National MOAA.

b. Publish a professional NewsGram at least eight times per year and achieve a five-star rating from National MOAA.

c. Publicize selected Chapter events in local newspapers as appropriate.

d. Professionally represent Luke Chapter at all JROTC award ceremonies.

e. Annually review and publish appropriate Luke Chapter promotional materials.

iii. To conduct and develop timely and appropriate Luke Chapter programs and activities throughout the Phoenix West Valley area which are innovative, interesting, and service oriented.

a. Obtain interesting speakers primarily related to the military and which pique member interest and encourage attendance at Chapter meetings.

b. Welcome member input and conduct at least biennially a survey of all members for their feedback regarding morale, improvements, etc.

c. Consider as appropriate interesting trips and/or outings to local primarily military related events and/or locations.

d. Conduct at least biennially a seminar or informational session on social security, wills, trusts, taxation, powers of attorney, rights, etc. for all interested Chapter members.

e. Invite and host at least one JROTC unit director to three Chapter meetings each year and feature outstanding JROTC cadets periodically in the NewsGram.

f. Conduct at least two events annually specifically for Surviving Spouses (SSs) which are educational and informative and designed to enhance camaraderie. Events will be outlined in the annual SS plan.

g. Manage and sustain a dynamic, growing scholarship grant program for eligible graduating high school seniors entering a college degree program, and for continuing college students in such degree programs.

h. Manage and sustain an active veterans relief grant program focused on but not restricted to the West Valley, to provide monetary grants and food assistance to needy active duty, reserve, retired and former military members, and their family members, who experience a financial emergency concerning unpaid rent and late charges, utilities, medical costs, car repair expense, or other high priority household financial need.

i. At all times maintain compliance with the requirements and obligations of IRS Code Section 501(c)(19) for veterans' organizations.

iv. To acquire and maintain the financial and other resources needed to accomplish stated goals and objectives.

a. Maintain an annually established minimum reserve in the Chapter operations account to ensure sustainability from year to year. The long-range target for the unrestricted reserve is established at 20% of budgeted expenses at the beginning of the fiscal year, recognizing that several years may be required to attain this target.

b. Conduct an annual financial review of Luke Chapter funds no later than October 15 following the end of the fiscal year. Such review to be conducted by at least two members who are not allowed to sign checks or transfer funds from or to the Chapter bank account.

c. Prepare and approve the coming year's budget no later than the final Board meeting of the fiscal year and attach such budget to the Chapter meeting minutes.

d. Prepare and maintain on permanent file and on the Chapter website a financial statement consisting of a Balance Sheet and an Income Statement for the previous year completed no later than 30 days after the end of the fiscal year.

e. Confirm a matrix list of legal obligations and filing deadlines no later than 30 days after approval of the Strategic Plan for all known and significant compliance requirements for corporate and tax reports which assigns responsibility for meeting all such obligations on time.

f. Maintain in accordance with the record retention policy both electronic and paper copies on file of all NewsGrams, minutes, financial statements and other historical documents and periodically bring to the attention of Chapter members at Chapter meetings.

g. Review income generation sources, which includes setting adequate dues, holding raffles, holding an annual fund-raising drive, etc. to ensure sustainability of all Chapter operations.

v. To grow Chapter-membership each year through an aggressive recruiting plan which incorporates unique, diverse segments within Luke Chapter's membership.

a. Ensure the percentage of Chapter members who are members of National is at least 95% (100% is ideal).

b. Establish a goal of growth in new memberships annually which is at least 10% of current memberships.

c. Ensure the national MOAA Committee Module information is updated in a timely manner.

d. Grow the number of National Life Members each year by periodic BLAST emails and articles in the NewsGram.

e. Continually stress “Each Member Recruit a Member” and “Never Stop Serving”.

f. Retain at least 90% of current members each year.

g. Create a welcoming and supportive environment in which all MOAA members can thrive.

vi. To support and foster a bond of friendship and camaraderie among Luke Chapter members.

a. Establish an action plan for welcoming new members which encourages involvement in Chapter activities immediately.

b. Establish a plan for leadership succession which grooms Chapter members for increased responsibility.

c. Provide direction regarding former and retired officer entitlement information.

d. Contact a surviving spouse (SS) as soon as possible following notification of a member’s death and provide assistance as appropriate.

e. Call all members at least annually to determine thoughts about Chapter operations and inquire as to their health and other needs.

f. Provide new and recurring Personal Affairs information as it becomes available or needed via articles in the NewsGram or through BLAST emails.

g. Call (as appropriate) all known members who are ill and/or in the hospital and send cards.

Implementation Plan and Assessments

The Luke Chapter Strategic Plan focuses on the above-described vision, mission, and goals. Designated members guided by the Board of Directors will accomplish the more detailed and specific objectives needed to meet these goals. The Luke Chapter Strategic Plan will be reviewed every two years by the Strategic Planning Committee in accordance with Bylaws, Article X, Section 2, and is approved bi-annually by the Luke Chapter Board of Directors (BOD).

The Strategic Planning Committee will develop, review, and periodically modify the Strategic Plan for the continued well-being of the Chapter, the betterment of its members, and its ability to support the veterans’ community. The plan is considered a 5-year plan which will be reviewed annually and updated when deemed appropriate by the committee, and in turn be presented to the general membership for their review each year.

The President and the BOD will guide the implementation of this plan on an annual basis. Through their normal course of business, the President and the BOD may ask the Strategic Planning Committee to provide additional goals and specific objectives as deemed appropriate. Following the annual assessment process, the Strategic Planning Committee will draft a written summary of findings and recommendations and present their findings to the President and the BOD for their actions as needed.

