



**Notes/ Minutes of  
California Council of Chapters Military Officers Association of America (MOAA)  
Annual Meeting - hybrid (a combination of Zoom and in person)**

**Purpose:** Primary purpose of CALMOAA is to address legislation and Surviving Spouses.

**CALMOAA ANNUAL MEETING AGENDA:**

Friday, November 4, 2022

1. Congresswoman Julia Brownley (Congressional 26<sup>th</sup> District)
2. Assemblymember Jacqui Irwin (44<sup>th</sup> Assembly District)
3. Gail Joyce, Chair of MOAAs Surviving Spouse Advisory Council
4. Kathy Prout, CALMOAA Surviving Spouse Representative
5. Dan Merry, MOAA's Vice President of Government Relations
6. Frank Michael, MOAA's Program Director, Council and Chapter Affairs
7. Allen Maxwell, CALMOAA Treasurer's Report

Saturday, November 5, 2022

1. Tom Brown, CALMOAA Membership
2. Patty Wernet, CALMOAA Chapter Affairs Report
3. Bruce Lowman, CALMOAA Elections
4. Comments from the new CALMOAA Board
5. Closing

The meeting was called to order by Fred Green, President of CALMOAA, at 8:23 a.m. on November 04, 2022 at the Courtyard by Marriott in Oxnard, California. Discussion and vote on the September Minutes was deferred to Saturday.

**1. CONGRESSWOMAN JULIA BROWNLEY (CONGRESSIONAL 26<sup>TH</sup> DISTRICT).**

- 1) Congress relies on MOAA to understand needs and develop legislation for veterans and retirees.
- 2) Her priorities mirror MOAA's priorities.
  - a) Top priority was toxic exposure. PACT Act was passed
    1. Expands VA benefits
    2. Identifies twenty new presumptive conditions
    3. Increases eligibility of care
  - b) Veterans suicide crisis. STRONG Veterans Act of 2022. Goal is to pass it this year.
  - c) Aging veterans.
    1. Elizabeth Dole Home and Community Based Services for Veterans and Caregivers Act of 2022 has been introduced.
    2. Expands existing programs and services
    3. Relaxes eligibility criteria for caregivers.



4. Deborah Sampson Act has passed the House. It is directed toward women veterans and issues they face
  - a. Breast cancer treatment
  - b. Military sexual trauma
  - c. LGTBQ
- 3) Established new VA outpatient clinic in Ventura County. Named after Captain Rosemary Bryant Mariner.

## 2. ASSEMBLYMEMBER JACQUI IRWIN (44<sup>TH</sup> ASSEMBLY DISTRICT).

- 1) State budget priorities
  - a) Infrastructure investment of \$47 Billion
  - b) Education. Spending increase from 11K to \$22K per student
  - c) Climate change funding of \$19 Billion
  - d) Tax refund for middle class
- 2) Sponsored California Assembly Bill 325
  - a) Veterans discharge upgrade program
  - b) Signed into law on September 17, 2022.
- 3) Veterans Housing and Homelessness Prevention Program (VHHP).
  - a) \$100 Million toward suicide prevention
  - b) \$50 Million Californian initiatives
    1. \$5 Million for outreach programs
    2. \$5 Million for surveillance overview
    3. \$40 Million for mental health. Funds competitive grants and matching grants to local initiatives
    4. Builds infrastructure in conjunction with Federal programs
- 4) Q&A. California tax exclusion – what can we do?
  - a) Strong support going into Appropriation Committee, but held up there.
  - b) Lobbying efforts should focus on Governor. He needs to send a signal he would like to pass it.
  - c) Get a budget appropriation to fund it first
    1. Fund in same year
    2. Fund in next year
    3. Telescope the funding over several years
  - d) Focus on contributions to California
    1. Percentage of members who join the work force
    2. Skill level and high qualifications of members
    3. Department of Finance considers cost, not benefit to State. Estimated \$60 Million out of \$240 Billion cost, i.e. “Budget Dust”
  - e) Paths to pursue
    1. Get it funded in the budget
    2. Connect with heads of Appropriations Committee and Tax and Revenue Committee



3. Educate Appropriation Committee members
4. Provide cost analysis to Department of Finance
5. Build rapport with veterans consultant(s) on Governor's staff

### **3. GAIL JOYCE, MOAA SURVIVING SPOUSE AFFAIRS. "PREPARING FOR THE FUTURE."**

- 1) Surviving Spouse Advisory Council (SSAC)
  - a) Full voting members of MOAA
  - b) Surviving Spouse Virtual Chapter created in 2018
  - c) Comprised of six members plus MOAA Board Surviving Spouse representative. Members serve 4-6 year terms.
  - d) Represents all surviving spouses of a military officer who was or could have been a member of MOAA.
  - e) Advises MOAA president on issues unique to surviving spouses and contribute to accomplishment of MOAA key strategic goals.
  - f) Engages through updates to specific topic publications such as Survivor's Planning Guide.
- 2) VA office of Surviving Assistance.
  - a) Resource of choice for survivors and dependents of deceased service members for information on benefits
  - b) Advocate and champion of survivors and dependents within the Department.

### **4. KATHY PROUT, CALMOAA SURVIVING SPOUSE AFFAIRS.**

- 1) What is Survivor Benefits?
- 2) What is Dependency and Indemnity Compensation (DIC)?
  - a) Paid by the Veterans Administration
  - b) Paid to surviving spouses and children of service members who die on active duty, or
  - c) Paid to surviving spouses and children of those who die of one of the VA presumptive health conditions or disabilities
- 3) Survivors receive SBP – DIC = 78% less income from active duty pay.
- 4) Be prepared
  - a) Wills, Trusts
  - b) Accounts updated to indicate survivorship
  - c) Need at least six months of income saved
  - d) Visit the VA to establish a disability rating
  - e) CAL VET benefits
    1. Property tax exemptions
    2. Disabled veterans property tax exempting
    3. Education



4. College tuition fee waiver (California)
  5. California National Guard Education Assistance Award Program (CNGEAAP). Financial awards up to 100% of tuition to qualifying members of California Army or Air National Guard and State Military Reserve.
  6. Post-911 GI Bill, Chapter 33
- 5) Grass Roots Advocacy.
- a) Establish Facebook Group
  - b) Create petition on Chagne.org
  - c) Educate members

**5. JON SIEPMANN, GOVERNORS MILITARY COUCL.**

- 1) Military impact on California. Contributes over \$160 Billion to economy.
- 2) Reinforces how important the defense sector is to California
- 3) Holds summit meetings in locations throughout the state. Open to the public.

**6. DAN MERRY, GOVERNMENT RELATIONS COMMITTEE, MOAA ADVOCACY IN ACTION. "QUARTERLY LEGISLATIVE UPDATE:"**

- 1) FY2023 NDAA awaiting Senate vote and pending conference committee.
  - a) HASC proposed 3-year hold on medical billet cuts and no cost dental for selected Reserves.
  - b) SASC proposed revamped TRICARE Dental Program and mental health provider scholarship-for-service program with non-uniformed MHS service obligations.
- 2) House and Senate lack consensus on how or how much to fund the government.
  - a) PACT Act. President Biden signed PACT Act on August 10, 2022.
  - b) VA accepting claims now and will begin processing in January.
- 3) Legislative news
  - a) BAH increase for 28 housing areas
  - b) DECA pricing adjustments to assure 25% savings
  - c) DLA increase for E-1 to E-6
  - d) Military Spouse Fellowship Pilot
  - e) Increased child care fee assistance to \$1700 per month
- 4) America's National Cemetery (ANC) Act. Expansion talks continue.
- 5) Military Spouse Hiring Act. Strong bipartisan support for Work Opportunity Tax Credit Program.
- 6) TRICARE. No new fee/increases. Approximately 15K independent pharmacies cut from TRICARE network.
- 7) Advocacy in Action
  - a) Councils and Chapters to fill the ranks for in-person contact
  - b) Possible topics



1. Active Duty pay raise
2. TRICARE pharmacy access for families and retired

#### **7. JEFF BREITEN, CALMOAA “LEGISLATIVE INITIATIVES, FOCUS FOR 2023”**

- 1) 2022 successes: Twenty-eight Veteran related bill signed into law. Common denominator was there was no cost to California.
- 2) Focus for 2023.
  - a) SBP Pay
  - b) Teacher’s credentialing.
  - c) Retired pay tax exemption. Strategy for success:
    1. Lesson learned #1. Have to have Governor’s support
    2. Facebook groups created by Steve Donlon
    3. Documents added to Facebook site
    4. Petition creation
    5. California work force development impact
    6. Identify the cost

#### **8. FRANK MICHAEL, MOAA COUCIL AND CHAPTER AFFAIRS. “MOAA INITIATIVES IN SUPPORT OF CHAPTERS”**

- 1) Program updates
  - a) Association Management System change
  - b) New virtual JAGC Chapter
  - c) Crisis relief grants
  - d) CEO (Brian Kelly) and MOAA Board changes
- 2) Strategic Plan (2022-2026).
- 3) Growing membership. Recruiting publications
  - a) 2022 Chapter Recruitment Guide
  - b) Council and Chapter Policies and Procedures Guide, Section 4
- 4) Best practices
  - a) Every member is a recruiter
  - b) Build a recruiting package (letter, application, newsletter, etc..)
  - c) Have a web presence
  - d) Use social media
  - e) Personal connection with local military
- 5) Near Real Time Report
  - a) Accessible via Committee Module
  - b) Refreshes every 30 days
  - c) Provides new MOAA members in area, relocated to area, and recently opted-into Chapter communications
- 6) Electronic Support Messages. Email sent on behalf of chapter to all National MOAA members within a Chapter’s zip code.
  - a) Two emails per year can be sent



- b) Advertise Chapter events and activities
- c) Apply via CCA webpage
- 7) Community Sponsorship Grants
  - a) Provide financial support for community relations activities and supplies.
  - b) Chapters eligible for \$300 annually and Councils \$800 annually.
  - c) Apply on the CCA webpage.
- 8) Chapter visit program
  - a) Visit Councils each year
  - b) Visit Chapters every 2-3 years
- 9) Annual recruiting incentive
  - a) \$15 for new or upgrade to Premium
  - b) \$30 for new or upgrade to Life
- 10) State Legislative Forum. Facilitates exchange of information across councils and Chapters.
- 11) Additional advocacy areas include retention, grassroots advocacy, community engagement (Community Outreach Chapter Grants), Crisis Relief fund, Levels of Excellence awards, Leader training workshops.

**9. PRESENTATION OF AWARD. Frank Michael presented Council Leadership Excellence award to Fred Green for service as California MOAA Council President.**

**10. ALLEN MAXWELL, TREASURER'S REPORT.** A motion was made, seconded, and unanimously approved to accept the report and adopt it as the 2023 budget.

**11. TOM BROWN, CALMOAA MEMBERSHIP. "CALMOAA Recruiting and Retention of Chapter Members."**

- 1) Membership
  - a) 130 (end of October) extrapolated to 151 new members at end of 2022. Compares to 261 new members for 2021.
  - b) Chapter objective of 90% retention for year.
- 2) Recruiting
  - Every member is a recruiter
  - Create a recruiting package
  - Keep a running list (at the Board level) on all potential members
  - Consider incentives for new members
  - Send all potential members a copy of the Chapter newsletter
  - Make it easy to join the Chapter
  - Get business cards for Board members
  - Have presence on social media (especially a Chapter website).
  - Reach out to all sources for potential members
- 3) Retention
  - Robust mission statement



- Newsletter should address relevant issues
- Have a purpose beyond meeting for meals and camaraderie
- Recognize members and spouses
- Change your programs and venues periodically
- Welcome new members in the newsletter
- Make it easy for members to pay dues
- Keep in contact with surviving spouses

12. **MINUTES.** The September meeting minutes was transmitted to all Chapters and discussed via email and accepted.

### 13. **PATTY WERNET, CHAPTER AFFAIRS REPORT**

- 1) Patty attended Twenty Chapter meetings (out of twenty-seven total) and read Chapter emails during the period to take group temperature.
- 2) Most Chapters are meeting monthly.
  - a) Area L meets once per year.
  - b) Five Chapters could not be reached or did not respond to queries.
- 3) Some Chapters are holding virtual meetings around specific topics.
- 4) Some Chapters are introducing techniques such as “Member Focus” to their meetings. They allot fifteen to twenty minutes in the agenda for a member to lead a discussion about a topic that interests them.
- 5) Virtual Chapters (VSO’s). At the State level, the CALMOAA Council does not have a way to access members of VSO’s. The Council relies on National MOAA for email blasts to try and connect with them.
- 6) National MOAA modules. Most Chapters do not update them or are not sure how to update them.
- 7) MOAA provides Near Real Time Reports as a recruiting tool.
- 8) Summary of Chapter challenges:
  - a) Fifteen or fewer members are attending most meetings
  - b) Replacing Board members
  - c) Determining a consistent meeting location
  - d) Expanding activity interest beyond social events
  - e) Proximity of Chapters, active-duty bases, or reserve units

### 14. **BRUCE LOWMAN, CALMOAA ELECTION RESULTS**

- 1) The new CALMOAA Board effective as of December 01, 2022 is as follows:

President:	Stephen Donlon, CAPT, USN (Ret)
1 <sup>st</sup> VP	Patricia Zindler-Wernet, COL, USA (Ret)
2 <sup>nd</sup> VP Chapter Affairs	Patricia Zindler-Wernet,, COL, USA (Ret)
3 <sup>rd</sup> VP Legislative Affairs	Jeff Breiten, LCDR, USN (Ret)





4 <sup>th</sup> VP TOPS	NAVNET
5 <sup>th</sup> VP Membership	Tom Brown, LTC, USAF (Ret)
ROTC Coordinator	Joe Boscacci, COL, USA (Ret)
ESGR Coordinator	Joe Boscacci, COL, USA (Ret)
Immediate PP	Fred Green, LCDR, USN (Ret)
Senior Advisor	Ed Hanlon
Senior Legislation Advisor	Open
CALMOAA Secretary	Steven Streightiff, LCDR, USN (Ret)
Treasurer	Open
CALMOAA Surviving Spouse	Kathy Prout
CALMOAA Chaplain	Johnny Carr, LTC, USA (Ret)
Web Admin	Fred Green, LCDR, USN (Ret)
Area 1 Vice President	Chuck Jamison, CPT, USA
Area 2 Vice President	Gil Borgardt, CAPT, USN (Ret)
Area 3 Vice President	Michael Kwan, LTC, USAF (Ret)
Area 4	Open
Area 5 Vice President	Gene Talmadge, CDR, USN (Ret)
Area 6 Vice President	Thomas Bell, CPT, USA
Area 7 Vice President	Edward "Ed" Apostol, LTC, USA (Ret)
Area 8 Vice President	Steve Donlon, CAPT, USN (Ret)

2) Dean Mallires swore in the new Board members.

Attendance: Assemblymember J. Irwin (guest), Congresswoman Julia Brownley (guest), Frank Michael ([frankm@moaa.org](mailto:frankm@moaa.org)), Dan Merry ([danm@moaa.org](mailto:danm@moaa.org)), Allen Maxwell ([allen.maxwell@omni2max.com](mailto:allen.maxwell@omni2max.com)), Martin Frey ([duke06@dc.rr.com](mailto:duke06@dc.rr.com)), Michale Moticha ([michaelwmoticha@verizon.net](mailto:michaelwmoticha@verizon.net)), Michael Schiffner ([mike.schiffner@gmail.com](mailto:mike.schiffner@gmail.com)), Lynn Snyder ([snyderlynn8@gmail.com](mailto:snyderlynn8@gmail.com)), Jon Siepmann, John Harper ([jbarryharper@hotmail.com](mailto:jbarryharper@hotmail.com)), Dan Pemberton ([dhpinto@aol.com](mailto:dhpinto@aol.com)), Gene Talmadge ([jngtalmadge@msn.com](mailto:jngtalmadge@msn.com)), Michael Kwan ([mk4524@gmail.com](mailto:mk4524@gmail.com)), John Harper ([jbarryharper@hotmail.com](mailto:jbarryharper@hotmail.com)), and Fred Green ([fred.green@me.com](mailto:fred.green@me.com))

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The Board meeting was adjourned on Saturday, November 5, 2022 at 10:02 a.m. The next meeting will be held in January 2023 via Zoom.

Submitted by,

Steven Streightiff  
CALMOAA Secretary