## **2024 Report to Members**

## Military Officers Association of America Middle Tennessee Chapter (MTC)



### **MOAA Levels of Excellence 5 Star Chapter**

- On 7 September 2023, MTC was designated a MOAA 5 Star Levels of Excellence (LOE) Chapter for the year 2022. This is our tenth consecutive year to receive this award!!
- The chapter received its award emblem during a MOAA National visit in October by Captain W.G. "Bud" Schneeweis, USCG, Ret.







# 2023 Annual Financial Report



## **2023 Annual Financial Report**

	2020	2021	2022	2023
Income				
Dues (Online & Local)	\$3,025.00	\$3,415.00	\$4,275.00	\$3,745.00
MOAA National Incentive	\$165.00	\$150.00	\$140.00	\$30.00
Scholarship Donations	\$6,614.20	\$8,154.20	\$12,954.92	\$6 <b>,</b> 489.20
MOAA Community Outreach Grants	\$0.00	\$0.00	\$8,228.00	\$4,250.00
MOAA Community Sponsorship				\$300.00
Miscellaneous Donations	\$100.00	\$115.00	\$1,636.26	\$1,100.01
Luncheon	\$520.00	\$1,400.00	\$2,915.00	\$3,745.00
Interest	\$2.51	\$1.27	\$12.98	\$15.23

**Total Income** 



\$10,426.71 \$13,235.47 \$30,162.16 \$19,674.44

## **2023 Annual Financial Report**

Operating Cost	2020	2021	2022	2023
Luncheons (Net of Cash Received)	\$507.00	\$1,466.87	\$3,352.99	\$3,936.14
Administrative	\$2,084.05	\$2,579.43	\$4,426.02	\$4,250.54
Local Charity Donations/Grants	\$1,600.00	\$1,600.00	\$9 <i>,</i> 886.02	\$5 <i>,</i> 800.00
MOAA Community Sponsorship				\$289.91
Scholarships Given	\$6,614.20	\$8,154.20	\$10,779.92	\$5,175.00
Total Operating Cost	\$10,805.25	\$13,800.50	\$28,444.95	\$19,451.59
Bank Balance Forward Jan 1st	\$6,511.53	\$6,123.20	\$5,558.17	\$7 <i>,</i> 275.38
Net Gain/(Loss)	\$378.54	-\$565.03	\$1,717.21	\$222.85
Ending Bank Balance Dec 31st	\$6,123.20	\$5,558.17	\$7 <i>,</i> 275.38	\$7,498.23

\*Note: Net amount for 2023 is **\$3,759.03** (Deduct \$3,489.20 in scholarship donations and \$250 in MOAA Community Outreach Grant funding).



# **Legislative Affairs Surviving Spouses**



### **Legislative Updates – Surviving Spouses**

- Three New Bills Were Introduced:
  - ≻ (H.R. 3232) (S.1588) "Respect for Grieving Military Families Act"
  - ≻ (H.R. 1083) (S. 414) "Caring for Survivors Act of 2023"
  - ≻ (H.R. 3651) (S. 1266) "Love Lives on Act 2023"







# **Legislative Affairs**



#### **Legislative Liaison**

#### • <u>State</u>

- Public Chapters Approved by 113<sup>th</sup> General Assembly of the State of Tennessee and Signed by Governor Bill Lee
  - \* <u>#311</u>: Creates a new pathway for honorably discharged veterans to receive an occupational teaching license
  - \* <u>#404</u>: An honor guard grant program is created to offset expenses associated with honor guard duties at military funerals
- ➤ Tennessee Veterans Day on the Hill Wednesday, January 31, 2024
  - \* Electronic Voting for Active Duty
  - Medical Cannabis
  - \* Restoration of the 2<sup>nd</sup> Free Auto License Plate for 100% Disabled Veterans
  - Identify and implement processes/procedures that document what the state is accomplishing in hiring qualified veterans within its departments
  - \* Tax equalization involving changes to state law calculations to stop penalizing 100% disabled veterans for property tax relief based on yearly market value fluctuations



### Legislative Liaison (cont)

#### • Federal

- FY 2024 National Defense Authorization Act was passed and signed on Dec 22, 2023
  - Defense Department received \$883.7 Billion
  - \* Provides a 5.2% pay raise for military members and civilian employees
  - Modifies the Basic Allowance for Housing calculation rates for junior enlisted
- Continued action will be needed on:
  - \* Defending service-earned burial benefits by supporting H.R. 1413, <u>the</u> <u>Expanding America's National Cemetery Act</u>
  - Continuing the ongoing push for passage of the <u>Major Richard Star Act</u>, which grew in co-sponsors throughout the year and now has the support of more than two-thirds of lawmakers





# **Chapter Outreach**



## **2023 Scholarships**

- Chapter Scholarship donations totaled \$6,489.20
- MTC MOAA funded Veteran Scholarships \$1,000 each
  - \* Belmont University
  - \* Lipscomb University
  - \* Tennessee State University



- MTC MOAA's Endowed Veterans Scholarship at Lipscomb University funded its first gift in 2023
- MTC MOAA fully funded our <u>fourth</u> MOAA Family Scholarship in 2023 (\$2,840.87) and provided an additional \$648.33 check to the MOAA Foundation



## 2023 Scholarships (cont)

- Chapter now has four \$25,000 MOAA National Scholarships for dependents
  - \* This year's recipients published in November 2023 edition of *Military Officer Magazine*
  - \* One of the four funded MOAA National Scholarships was named after LTC Charles Flemming, USA, Retired
- Noteworthy donations
  - Mrs. Nancy Willems (executor of the Fleming Family Trust) donated
    \$2,000
  - \* One chapter member donated \$1,000
  - \* Several chapter members donated \$100 \$200



## **Reserve Officer Training Corps Support**

- 2023 MOAA Outstanding Cadet medals and certificates awarded to three cadets from the respective four-year ROTC programs
  - \* Army ROTC (Vanderbilt University) Cadet Bowman B. Talbot
  - \* Navy/Marine Corps ROTC (Vanderbilt University) Midshipman 2/C Philip C. Chandler
  - \* Air Force ROTC (Tennessee State University) Cadet Katelyn A. Carpenter



Orientation visits held with new Navy ROTC Detachment Commander



## Junior Reserve Officer Training Corps Support

#### ≻ 2023

- \* Supported 13 JROTC units in 2023
- Chapter members presented 13 awards to cadets at the JROTC units in Middle Tennessee high schools

#### ▶ 2024

- Continuing to support 13 JROTC units in 2024
- First presentation will be in early February





## **MOAA Foundation Community Outreach Grants**

#### 2022 Community Service Project

- \* Matthew 25 Career Development Project:
  - \$3,241.43 spent on computer equipment, printers and ink. Remaining grant funds used for printer supplies
  - Career development project held in March 2023
  - Over 20 residents received advice on career development topics

#### 2023 Community Service Projects

- \* Operation Stand Down Tennessee Holiday Market Project:
  - Held Dec 19, 23
  - \$2,000 in \$50 Publix gift cards distributed
  - 40 veterans benefited from the grant
- \* <u>Alzheimer's Association Operation Wind Down:</u>
  - Slated for Mar 16-17, 24 at Wildwood Resort and Marina
  - Educational and self-care retreat for military-involved dementia caregivers







## Additional Chapter Outreach Opportunities & Events

- MTC Memorial Day Service at the Middle Tennessee Veterans Cemetery
- Participation in Congressional Academy Selection Committees
- Transition Assistance
- ➤ TN Veterans Day on the Hill
- Centerstone Military Services
- Matthew 25 Foundation (Homeless Veterans)
- MOAA Military Family Initiative
- Operation Stand Down Tennessee (OSDTN)
- USO Nashville/Ft. Campbell
- Tennessee Fisher House
- A Soldier's Child Foundation
- ➢ USMCR Toys for Tots Program
- Wreaths Across America Middle Tennessee Veterans Cemetery









- January Annual Program Update
- <u>February</u> Battle of Nashville and the Pivotal Role of the United States Colored Troops – Mr. Richard White
- March The Mission Continues Mr. G. Daniel Collins, Jr.
- <u>April</u> Personal Affairs Major Chris Johnson, USMC, Retired
- <u>May</u> Tribute to Military and Surviving Spouses Mrs. Alex Denis





2023

- June Salute to Military Women Colonel Beverly Lee, USAF, Retired
- <u>July</u> National Cemetery Administration Dr. Les Melnyk
- <u>August</u> Veterans Benefits and Assistance Mr. Jon Foti
- <u>September</u> TN Valley Healthcare System Mr. Edward Payton
- <u>October</u> MOAA National Chapter Visit Captain W.G. "Bud" Schneeweis, USCG, Retired
- <u>November</u> The State of U.S. Army Recruiting LTC (P) Kirsten McFarland, USA







- January Annual Program Update
- <u>February</u> Veteran and Vocalist Brei Carter, Former USA Soldier & Officer
- March SCORE Business Mentoring Mrs. Lisa O'Dell
- <u>April</u> Tennessee State Veterans Homes Update Mr. Ed Harries



# Membership



## **MTC Membership**

≻ As of December 31, 2023, our membership totaled 228

- In 2023, we added 14 new members; however, we lost 8 members who moved, 15 requested to go inactive or ceased responding to emails/calls (4 were in their Free Year of Joining 2022), 3 transferred to another Chapter, and 10 passed away
- Our current membership mix is 9 currently serving, 18 former officers, 27 surviving spouses, 173 retired officers and 1 Honorary member
- Membership is an issue with most Veteran organizations these days; however, we have stayed ahead of the curve as a result of the efforts of our best recruiters -- YOU!



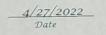
## **MTC MOAA Chapter Website** https://www.mtcmoaa.org



#### 2022 Col Marvin J. Harris Communications Award 4 Star

Middle Tennessee Chapter, MOAA Website COL Doug Minton, USA (Ret), Webmaster

It Gen Brian T. Kelly USA Ther





#### 2023

## **MTC Officers & Directors**

- President Lt Col Karon Uzzell-Baggett, USAF, Retired
- 1<sup>st</sup> Vice President CAPT Larry Cotton, USN, Retired
- 2<sup>nd</sup> Vice President COL Jacqueline Tubbs, USA, Retired
- Treasurer/Director LCDR Bea Henderson, USN, Retired
- Past President/Secretary/Director COL Doug Minton, USA, Retired
- Past President/Director CDR John Ohlinger, USN, Retired
- Past President/Director LTC Wanda Bruce-Graham, USA, Retired
- Past President/Director CAPT Larry Cotton, USN, Retired
- Past President/Director CAPT Dale Lewelling, USN, Retired
- Past President/Director LTC Mike Patenaude, USA, Retired
- Surviving Spouse Liaison/ Director Mrs. Patricia Bergquist
- Legislative Affairs Liaison/ Director- CDR Ted Edwards, Retired
- Transition Services Liaison Lt Col Arlie Haddix, USAF, Retired



## **President's Comments**



# 2024 Change of Command and New President's Remarks

