

# **2023 Report to Members**

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

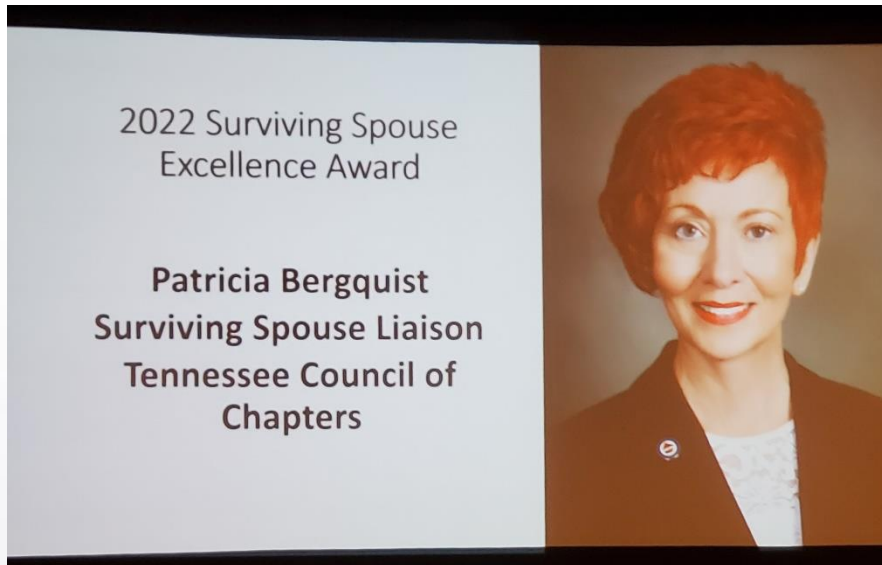
# MOAA Levels of Excellence 5 Star Chapter

- On 5 August 2022 MTC was designated a MOAA 5 Star Levels of Excellence (LOE) Chapter for the year 2021. This is our ninth consecutive year to receive this award.
- Pictured below Lt Col Karon Uzzell-Baggett, USAF, Retired, accepting the Award from Lt Gen Dana Adkins, USAF, Retired, MOAA President and CEO, and General Skip Sharp, USA, Retired, Chairman of the MOAA Board at the 28 October 2022 MOAA Annual Meeting.



# Additional MOAA Annual Award

- Mrs. Patricia Bergquist – 2022 Surviving Spouse Liaison Excellence Award!





# **Annual Financial Report**

# 2022

## Annual Financial Report

	2019	2020	2021	2022
Income				
Dues	\$3,200.00	\$3,025.00	\$3,415.00	\$4,275.00
MOAA National Incentive	\$90.00	\$165.00	\$150.00	\$140.00
Scholarship Donations	\$5,374.00	\$6,614.20	\$8,154.20	\$12,954.92
MOAA Foundation Grants	\$0.00	\$0.00	\$0.00	\$8,228.00
Miscellaneous Donations	\$0.00	\$100.00	\$115.00	\$1,636.26
Luncheon Checks	\$0.00	\$520.00	\$1,400.00	\$2,915.00
Interest	\$0.00	\$2.51	\$1.27	\$12.98
Total Income	\$8,664.00	\$10,426.71	\$13,235.47	\$30,162.16

# 2022

## Annual Financial Report

Operating Cost	2019	2020	2021	2022
Luncheons (net of cash received)	(\$238.00)	(\$507.00)	(\$1,466.87)	(\$3,352.99)
Adminstrative	(\$1,750.00)	(\$2,084.05)	(\$2,579.43)	(\$4,426.02)
Donations/Grants	(\$1,250.00)	(\$1,600.00)	(\$1,600.00)	(\$9,886.02)
Scholarships Given	(\$5,374.00)	(\$6,614.20)	(\$8,154.20)	(\$10,779.92)
Total Operating Cost	(\$8,612.00)	(\$10,805.25)	(\$13,800.50)	(\$28,444.95)
Net Gain/(Loss)	\$52.00	(\$378.54)	(\$565.03)	\$1,717.21
Bank Balance Forward Jan 1st	\$6,263.41	\$6,511.53	\$6,123.20	\$5,558.17
Net Gain/(Loss)	\$52.00	(\$378.54)	-565.03	\$1,717.21
Prepaid Dues	(\$40.00)	\$0.00	\$0.00	\$0.00
Reconciling	\$236.12	(\$9.79)	\$0.00	\$0.00
*Ending Bank Balance Dec 31st	\$6,511.53	\$6,123.20	\$5,558.17	\$7,275.38

\*Note: An additional check for \$2,175 sent to the MOAA Scholarship Fund for a third 2022 contribution. Current Jan 21, 23 balance is \$5,065.98 due to scholarship and reimbursement check deductions.





# **Legislative Affairs Surviving Spouses**



# Legislative Updates – Surviving Spouses

- Final phase-out of Survivor Benefit Program (SBP)/Dependency and Indemnity Compensation (DIC) Offset ends February 1, 2023!
- Four New Bills Were Introduced:
  - (H.R. 2214) (S.1669) “Military Retiree Survivor Comfort Act
  - (H.R. 3402) (S.976) “Caring for Survivors Act of 2021”
  - (H.R. 2827) (S. 4841) CAPT James C. Edge Gold Star Spouse Equity Act “Remarriage Bill 2021”
  - (H.R. 6849) “Supporting All Veterans Families Act”



# Legislative Affairs

# Legislative Liaison

- **State**

- Public Chapters Approved by 112<sup>th</sup> General Assembly of the State of Tennessee
  - \* [#63](#): Removes requirement that Veteran Services Officers be combat veterans
  - \* [#445](#): Major Trevor Joseph Act dedicated to burial services for active duty servicemembers in state veterans' cemeteries on the date desired by the family if notice is given at least 72 hours in advance
  - \* [#521](#): Discounted rates offered to veterans at state parks & year-around discounts of no less than 50% for camping/cabins
  - \* [#854](#): Requires an employer to allow a veteran employee to have Veterans Day as a non-paid holiday if certain conditions are met. Does not prohibit allowing this to be a paid holiday.

- **Federal**

- FY 2023 National Defense Authorization Act was passed and signed on Dec 23, 2022. Defense Department received \$816.7 Billion.
- Passage of the Sergeant First Class Heath Robinson Honoring Our Promise to Address Comprehensive Toxics (PACT) Act of 2022

# Chapter Outreach

# 2022 Scholarships

- Chapter Scholarship donations totaled \$12,954.92. The 2021 donations totaled \$8,154.
- MTC MOAA funded Veteran Scholarships - \$1,000 each
  - Belmont University
  - Lipscomb University
  - (New) Tennessee State University
- MTC MOAA's Endowed Veterans Scholarship at Lipscomb University is fully funded



# 2022 Scholarships (cont)

- Chapter has three \$25,000 MOAA National Scholarships for dependents
  - This year's Chapter gift of \$9,954.92 comprised of individual members' generous donations increased the fourth endowment to \$19,723.92 towards the \$25,000 requirement
  - One of the three funded MOAA National Scholarships was named after LTC Charles Fleming, USA, Retired
- Noteworthy donations
  - Kaplan Family Foundation (Mr. Michael Kaplan) donated \$5,000
  - Mrs. Nancy Willems (executor of the LTC Charles A. Fleming, USA, Retired Trust) donated \$2,000
  - Two chapter members donated \$1,000 each
  - Several chapter members donated \$100 - \$125



# Reserve Officer Training Corps Support

- 2022 MOAA Outstanding Cadet medals and certificates awarded to three cadets from the respective four-year ROTC programs
  - Army ROTC (Vanderbilt University) – Cadet Barrett D. Boese
  - Navy/Marine Corps ROTC (Vanderbilt University) – Midshipman 2/C Jack T. Warner
  - Air Force ROTC (Tennessee State University) – Cadet Abigail Mantooth
- Orientation visits held with new Army ROTC and Air Force ROTC Detachment Commanders



# Junior Reserve Officer Training Corps Support

2022

- Supported 13 JROTC units in 2022
- Chapter members presented 13 awards to cadets at the JROTC units in Middle Tennessee high schools

2023

- Continuing to support 13 JROTC units in 2022
- First presentation will be in early February





# MOAA Foundation Community Outreach Grant

- Community Service Projects

- Operation Stand Down Tennessee Hunger Action Project:

- \* September 30, 2022, with 160 food bags being packed by 12 chapter members and their families
- \* \$2,200 in \$10 Walmart gift cards distributed
- \* Remaining \$800 in gift cards will be distributed by April



- Alzheimer's Association Dementia Awareness Project: October 15, 2022

- \* Over 50 virtual & in-person attendees
- \* Positive feedback via written surveys



- Matthew 25 Career Development Project:

- \* \$3,241.43 spent on computer equipment, printers and ink
- \* Career development project slated for February

# 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



# MTC Programs

# 2022

## MTC Programs

- **January** – Annual Program Update
- **February** – Metro Nashville Police Department – Chief John Drake
- **March** - Veterans Services Officer Actions – Mr. Jeff Vaughn
- **April** – Personal Affairs – Dr. Jackie Pair, Ed.D. VA Vocational Rehabilitation Specialist
- **May** – Tribute to Military and Surviving Spouses – Mrs. Shelia B. Jones



# 2022

## MTC Programs

- **June** – Salute to Military Women – Major Charlynda Scales, USAFR
- **July** – Nashville International Airport Modernization – Mrs. Traci Holton
- **August** – Nashville Veterans Court – Judge Melissa Blackburn
- **September** – Memories of a White House Aide – COL Duffy White, USMC, Retired
- **October** – Bunker Labs & Entrepreneurship – Sean Patton, Former Captain, USA
- **November** – God’s Word for Warriors – Dr. Tom Seals



# 2023

## MTC Programs

- **January** – Annual Program Update
- **February** – Pending
- **March** - Pending
- **April** – (Personal Affairs) Elder Law – Mr. Chris Johnson, Major, USMC, Retired and Tackas-McGinnis Elder Law

# Membership



# MTC Membership

- As of December 31, 2022, our membership totaled 245
- Our current membership mix is 5% currently serving, 12% former officers, 12% surviving spouses, 70% retired officers, and 1% Honorary member
- In 2022, we added 18 new members; however, we lost a number of members who moved, requested to go inactive, or who passed away (7 reported in 2022)
- We have 108 members who are MOAA National Life Members, 54 members that belong on an Annual basis, 57 members that have taken advantage of the Basic program, and 26 members that are not currently members of MOAA National

# MTC MOAA Chapter Website

<https://www.mtcmoaa.org>





# President's Comments

# 2022

## MTC Officers & Directors

- President – Lt Col Karon Uzzell-Baggett, USAF, Retired
- 1<sup>st</sup> Vice President – **Vacant**
- 2<sup>nd</sup> Vice President – **Vacant**
- 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