



**Middle Tennessee Chapter  
Military Officers Association of America  
P. O. Box 50252  
Nashville, TN 37205-0252**

30 April 2018

MOAA  
Chapter and Council Affairs  
201 North Washington St.  
Alexandria, VA 22314

Ladies and Gentlemen,

On behalf of the Middle Tennessee Chapter it gives me great pleasure to submit our attached "Level of Excellence Award" application for the 2017 calendar year.

We attempted to utilize the form that was provided for this purpose, but were unable to insert pictures and position them with the appropriate text satisfactorily. We hope that our submission in the following manner will be acceptable.

Respectfully,

//Signed//  
Dale Lewelling  
Captain (Ret.) USN  
President, Middle TN Chapter, MOAA

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**Objective Portion Response:**

(We understand that Council & Chapter Affairs will begin compiling the numbers for the Objective Portion from the MOAA Database with the 2017 submission; however the exercise of listing our results functions as a double check for us, so we hope you will humor us in this process.)

(Procedural Note: On officer names we have taken the liberty of not entering (Ret.) and Branch of service once this information has been entered correctly the first time on an individual.)

1. All elected officers of the Middle TN Chapter (MTC) are members of the National MOAA organization (10 pts.)
2. The records in the Committee Module Membership Listing reflect that less than 80 % of our members are also members of the National MOAA organization. (0 pts)
3. The Middle TN Chapter Membership Roster was submitted to MOAA Council & Chapter Affairs on 11 January 2017, and confirmed by Amy Wood on 13 January 2017. We continue to submit new members using the online Chapter Membership form. (15 pts.)
4. The Middle TN Chapter Officer roster was updated using the MOAA website on 9 January 2017, and confirmed by MOAA Council & Chapter Affairs on the same date. (10 pts.)
5. COL (Ret.) Kent Crossley, USA continued his performance of duties as the Legislative Liaison for our Chapter in 2017 and did opt-in for the MOAA Legislative Updates. (10 pts.)
6. COL (Ret.) Doug Minton, USA continues his duties as our designated Membership Chair and Chapter Secretary. (10 pts.)
7. Mrs. Patricia Bergquist continues her duties as Surviving Spouse Liaison. (10 ps.)
8. The Middle TN Chapter has an established EFT account with MOAA National and continues to receive funds from MOAA National via this means. (5 pts.)
9. The Middle TN Chapter continued to play an active role in the TN Council of Chapters during 2017. Mrs. Patricia Bergquist served as Secretary, and COL Doug Minton served as Council 1<sup>st</sup> Vice President during this time frame. We also had active participation in Council meetings by Past Council President CDR (Ret.) John Ohlinger, USN; COL Kent Crossley and LTC (Ret.) Wanda Bruce Graham, USA. (10 pts.)
10. Chapter President CAPT (Ret.) Larry Cotton, USN opted in to receive both the Affiliate newsletter and the Council and Chapter Monthly Update during 2017. (5 pts.)

Middle TN Chapter Objective point scoring total for the 2017 LOE submission is 85 points.

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**Total possible points for Subjective Scoring = 75, including 10 extra credit points.**

**Address each section in order in a complete and concise manner. Your input will be reviewed and scored by members of MOAA's Council & Chapter Affairs Committee.**

**Section 1: Please describe your chapter's level of effort and results concerning the following chapter management subjects.**

- 1. Grassroots Advocacy, i.e. state-level meetings with legislators, etc.**
- 2. Community Engagement, e.g., Toys for Tots, Honor Flights, local scholarship initiatives, support of JROTC/ROTC programs, etc.**
- 3. Recruiting and Retention**

### **1. Grassroots Advocacy**

In the past several years we have attempted to hold numerous local chapter level meetings with both state and federal legislators, with results that were at best difficult to ascertain. In 2017 we refocused our grassroots efforts and attempted to bring the legislators to us and also actively supported the creation of a statewide Veteran's coalition.

On 22 September, we were honored to have Senator Bob Corker speak at our monthly meeting and address the culture in Washington, significant bills and his expectations going forward. It was a very candid conversation, followed by a very lengthy Q&A. (Pictured at right is Mrs. Patricia Bergquist, MTC Surviving Spouse Liaison making a point on the SBP-DIC Offset with Senator Corker.)



On 28 November, we were honored to have the Speaker of the TN House, Representative Beth Harwell speak at our monthly meeting and address the accomplishments of the 2017 TN Legislature. She was joined in the Q&A following her presentation, by Representative / COL (Ret.) Sam Whitson, USA one of our Chapter members. (Pictured at left are Speaker Harwell and State Representative/COL Whitson.)

Both of these meetings resulted in a far more effective level of advocacy and a more meaningful impression by our Chapter membership than we would have accomplished through visits to their local offices. That said, COL Kent Crossley, our Legislative Liaison valiantly continued to pursue visits to the local offices of our elected federal legislators throughout the year.

Over the last two years, the Veterans of Tennessee worked closely together to forge a unified voice in state Veteran legislation. 'Veteran's Day on the Hill 2017' was an unqualified success, leading to the passage of the two bills that we supported; the restoration of 100% permanent and total state property tax exemption for disabled Veteran's up to \$175,000 (part of the IMPROVE ACT

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(HB0534/SB1221) and the inclusion of state law that allowed private business protection when exercising Veteran's hiring preference (HB0165/SB0209).

Our Chapter was represented by (L to R - at right) COL (Ret.) Larry McKnight, USA, COL (Ret.) John Furgess, USA, LTC (Ret.) Mike Patenaude, USA, Capt. Hal Sauer, USAF and COL Doug Minton on the 8 February event.



On 2 September, the Veteran's organizations at the state level again introduced an initiative to formalize Veteran's legislative efforts through the creation of an entity that became known as the Tennessee Veteran's Empowerment Team (TVET) which was based to some degree on a similar initiative in Kentucky. *(A tip of the hat is due to members of the Ft. Campbell MOAA Chapter for spearheading this initiative.)* COL (Ret.) Doug Minton and COL Crossley represented both the TN Council of Chapters and MTC at this organizational meeting. (Following that meeting the TN Council of Chapters met on 18 October and agreed to join TVET at a Council level, representing all of our TN Chapters.)

**2. Community Engagement, e.g., Toys for Tots, Honor Flights, local scholarship initiatives, support of JROTC/ROTC programs, etc.**

Scholarship

Our Chapter continued to support two local grants/scholarships of \$1000.00 each for Veteran's attending Belmont University and Lipscomb University, for students falling into the categories of: permanently wounded/disabled Veteran's, combat wounded Veteran (Purple Heart), or failing to find one of the previous categories, a deserving Veteran. We have maintained a close liaison with both Universities and have a very good relationship built around these two scholarships. In addition, we continued to support the MOAA National Scholarship Program with a \$1000 unattached contribution in 2017.

ROTC/JROTC Support



Our Chapter continued its support of local area ROTC programs at Vanderbilt University (NROTC and AROTC) and Tennessee State University (AFROTC), and in addition to attending several programs sponsored by the schools, we presented the MOAA ROTC Leadership Award to deserving Cadets/Midshipman at both schools during their spring awards programs. (Pictured at left is Lt. Col. Karon (Ret.) Uzzell-Baggett, USAF and the MTC ROTC Support Coordinator and the AFROTC recipient at Tennessee State University.)

We continued to support the JROTC program at thirteen area High Schools. The MOAA JROTC Leadership Award was presented in person by six different MTC MOAA members at awards ceremonies and unit military balls. At several schools, the MOAA award and certificate was the only one presented by the awarding organization rather than by surrogates at the unit or school.

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(Pictured at right - CAPT Larry Cotton, the MTC JROTC Support Coordinator making the MOAA JROTC Leadership Award presentation for the Columbia Central High School.)



USO Nashville

Our Chapter continues to support USO Nashville and USO MEPS Nashville by both encouraging members to actively participate as volunteers and through an annual in-kind donation of food items and supplies consumed at the airport center (in the amount of \$221). Our current member volunteers are: COL (Ret.) John Phillips, USA; COL Doug Minton and his wife Janice; LTC Wanda Bruce Graham and her husband MSG (Ret.) Bill Graham, USMC; COL Kent Crossley; CPT Art Jacobs, USA; Capt. (Ret.) Bob Jones, USAF; LTC (Ret.) Tom Carr, USA; LCDR (Ret.) Bruce Kincaid, USN; and Mrs. Julia DeHart, a Surviving Spouse.

Operation Stand Down Tennessee (OSDTN)

OSDTN is a full-time 501(c) 3 nonprofit agency that assists veterans and their families so they can be self-sustaining and better connected to the community. OSDTN is currently making adaptive changes to their services to better enable them to reach the Post 9/11 Veteran so that they can battle the projected homelessness increase expected in 2025 to 2030. It is OSDTN's belief that if you can engage Veterans early in their transition, find out what that Veteran wishes to accomplish, show them available Veteran benefits and how to access them, and help them find meaningful employment, the hardships that many Veterans face every day can be prevented. Our Chapter support for this organization has not wavered in 2017. We continue to provide a voice and link to its endeavors, and share a number of MTC members with OSDTN as officers and board members of that organization: BG (Ret.) Eden Murrie, USAF is the OSDTN Chief Operating Officer; Capt. Bob Tuke, USMC is Immediate Past President of the Board of Directors; and LTC (Ret.) Jeff Collins, USA is Vice President of the Board.

In addition to supporting through a cash contribution of \$250; we also had a number of members that actively supported the OSDTN 7<sup>th</sup> Annual Heroes Breakfast on 18 August 2017. In attendance were: CAPT Larry Cotton; LTC Wanda Bruce Graham; LTC Mike Patenaude; Lt.Col. Karon Uzzell-Baggett; LCDR (Ret.) John Knubel, USN; 1LT Em Ghianni, USA; LTC (Ret.) Doug Gilbert, USA; COL Doug Minton; CAPT



(Ret.) Dana McLendon, USN; Mrs. Patricia Bergquist; CPT Art Jacobs; MAJ Martin Plumlee, USAR; COL Kent Crossley; CDR (Ret.) Jaime Hernandez, USN; Col. (Ret.) John Burns, USAF; 1LT Jim Sobery, USA; Lt.Col. (Ret.) Sara Jayne Williams, USAF; Major Gen. (Ret.) Carl Schneider, USAF; CPT Marjorie Eastman, USA; Capt. Coplin Curtis, USAF; LTC Matt Smith, ARNG; Col. (Ret.) Duffy White, USMC; and Lt.Col. (Ret.) Jeff Hill, USAF.

(The picture at left includes only a few of the members listed above. Pictured L to R - are Lt. Col. Burns, LTC Patenaude, LTC Bruce Graham, CAPT Cotton, COL Minton, LTC Gilbert, Lt. Col. Uzzell-Baggett, Mrs. Bergquist and CAPT McLendon.)

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MOAA Military Family Initiative

While not directly tied to our local community, our Chapter continues its support of the MOAA Military Family Initiative through the MOAA Heritage Society, providing a contribution of \$250 in May 2017. Our records indicate that we have now contributed \$875 to this very worthwhile national program.

Matthew 25 Foundation

Matthew 25 is a nonprofit agency providing transitional housing for homeless veterans referred by the VA. The agency serves approximately 200 homeless men each year in the Middle TN area, with 50% of them being veterans. We support this organization through a variety of means: in September 2017 the Chapter made a cash donation to Matthew 25 in the amount of \$250; several MTC Members serve on their Board, Capt. Hal Sauer as Chairman of the Board and Lt. Col. Karon Uzzell Baggett serves as Vice President of the Board of Matthew 25; and on an individual basis with a number of members, COL Doug Minton and COL Kent Crossley participating in the Matthew 25 Founders Breakfast in September of this year.

USMCR Toys for Tots

The Chapter continues to collect toys for this initiative every November, and did so quite enthusiastically again in 2017. Toys were collected and delivered to the Marines of Kilo Company 3/23 in Smyrna, TN following our November meeting for distribution in the Middle TN area.

Academy Admissions Selection Activities

Chapter members participate on a variety of levels in support of Service Academy appointments. Capt Hal Sauer continues his work as an Admissions Liaison Officer for both the Air Force Academy and AFROTC Scholarship programs in the Middle TN area. Lt. Col. (Ret.) Arlie Haddix, USAF is a “Prop and Wings Officer”, an Air Force Academy graduate who represents the Academy at public events such as Congressman Academy Days or college fairs. CDR John Ohlinger continued his duties with the Congressional Academy Selection Committees for the 5<sup>th</sup> and 7<sup>th</sup> Congressional Districts; and COL Doug Minton, LTC Mike Patenaude, CDR (Ret.) Mike Neuser, USN, COL Kent Crossley, and CAPT (Ret.) Dale Lewelling, USN all served on the Congressional Academy Selection Committee for Senator Bob Corker of TN.

Middle TN Memorial Day Ceremony

Our Chapter sponsors an annual Memorial Day remembrance at the Middle Tennessee Veterans Cemetery, which was held this year on May 27, 2017, with assistance from the Nashville Naval Operations Support Center Ceremony Detail, and the Staff of the Middle Tennessee State Veterans Cemetery. (Pictured at right, from L – R are Chapter members: LTC Mike Patenaude; Maj. (Ret.) Pete Long, USMC and beautiful family; Col. Duffy White; CAPT Larry Cotton; COL Doug Minton; CW04 (Ret.) J.T. Tenpenny, USMC; MAJ (Ret.)



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Sharone Hall, USA; COL Kent Crossley; CAPT Dale Lewelling, Mrs. Lynn Womack, Surviving Spouse; Lt. Col. Karon Uzzell-Baggett; Mrs. Patricia Bergquist; and Capt. Hal Sauer.)

In 2017 our Chapter continued to provide a voice for the following organizations by advertising their events on our website and at our meetings, and as a result numerous members have become involved in the missions of these organizations: *“A Soldiers Child”*, *“Joshua Chamberlain Society – Nashville”*, *“The Tennessee Fisher House”*, *“Wreathes Across America”*, *“The Mission Continues”*, *“Courage Beyond”*, and the *“Building Lives Foundation”*. Each of these organizations supports veterans or their families in our local community.

### **3. Recruiting and Retention.**

Our Chapter recruiting and retention is a key component of our leadership succession plan, and we are quite aware that this plan can only succeed if our Chapter recruiting is strong; so recruiting and retention remain a key focus for us at all times.

- a. In 2017 we added a total of 16 new members to the Chapter. Our most effective recruiting continues to be the result of a combination of person to person contact as we identify former, retired and active duty officers in the area, and from contacts that have emanated from the websites of the MOAA National and our Chapter. The Chapter Locator functionality on the MOAA National website is a very effective tool for officers moving into this area! Of the sixteen members that we recruited we have as of this date only lost one, as a result of their moving out of the area during the membership year.
- b. Our Chapter membership total has remained fairly stable at approximately 265 members. The New Member listings sent out on an annual basis from MOAA National have not provided a reliable recruiting tool for our Chapter, primarily due to the age of many of those listed precluding them from active participation and the fact that most of the BASIC members included seem to be very busy with life in general and conversely have little time to commit to Chapter membership. We have seen an increase in Former officer membership through word of mouth advertising. They very much enjoy the concept of “camaraderie with a purpose” and have become a constant long term piece of the membership puzzle. They are also very active in Veteran’s community engagement and have led us to some interesting organizations providing great services in the area. Former officers are a great Chapter resource, but MOAA National has failed to recognize the need to catch their attention, so few have joined at the National level.
- c. We continue to try to pull Active Duty, Guard and Reserve officers into our Chapter, but have only moderate success in that initiative. Although we are beginning to catch the interest of several Active Reserve and Guard officers, it is a slow process. We have offered Active Duty officers on Tours assigned to this area in Recruiting, ROTC, etc. complimentary memberships in

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order to introduce MOAA and our Chapter, but this has also only provided minimal results for the Chapter, although it has produced a number of MOAA Basic memberships for the National organization.

- d. Retention is really quite simple, get them engaged and keep the Chapter relevant in their eyes. Our monthly programs are designed to provide both relevance and introduction to outreach opportunities, and have been very effective in this area. The information provided in our newsletter and on our website has also been a valuable tool in maintaining relevance.

**Section 2: Please describe your chapter's level of effort and results concerning the following chapter management subjects.**

- 1. Leadership Succession Plan**
- 2. Personal Affairs Program**

**Chapter Leadership Succession Plan**

Our current chapter leadership succession plan was formalized in 2010 and has worked well to date (we currently have Board members in line to be President through 2023). Our Board of Directors has become the intentional incubation site for our ongoing Chapter Leadership. Our current Board members are charged with identifying potential Chapter leaders as a prerequisite to their selection to join the Board. Once on the Board, we assign a specific role (Transition Coordinator, Legislative Liaison, Scholarship Coordinator, ROTC Support Coordinator, Outreach Coordinator, etc.) that lasts a minimum of two years and then when possible we try to transition that person to another set of responsibilities so that by the time they move into a VP role they have developed expertise in one or more areas which are key to the Chapter's success. Roles may vary based on interest and familiarity, but once they become first vice president they become responsible for scheduling speakers for each of monthly meetings. While they receive a lot of Chapter assistance in identifying potential speakers, we have found that the process of vetting a speaker and then coordinating schedules, etc. is the best preparation for the position of Chapter President. We also make a concerted effort to retain several Chapter Past Presidents on our Board in order to continue to have the benefit of their experience. The above plan is sound but it only works if we continue bringing new officers onto the Board, so the constant challenge is determining how and when this needs to happen.

**Personal Affairs Program**

LTC Wanda Bruce Graham continued in her role as Chapter Personal Affairs officer during 2017. Our Personal Affairs model is to provide information on an as available basis to the membership year round, and then to designate one meeting a year to focus on a particular area of interest for this subject. In addition LTC Graham maintains contact with members as we learn of illnesses, deaths, or noteworthy events that transpire throughout the year.

Our Personal Affairs Program was conducted in February 2017, and focused on the challenges created by the desire to age in place, as well as how to face the issue of moving later in life for both members facing

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these issues and for members whose parents are facing these issues. Challenges, solutions and a myriad of considerations were discussed by representatives of "SITTERS & MORE" and "LETS GET MOVING". It was a light-hearted approach to an issue that everyone will face in time.

LTC Graham also took the opportunity to remind everyone of the many great guides produced by MOAA for individual personal affairs: "Personal Affairs Action Guide - A Personal Inventory for Peace of Mind", "Help Your Survivors -Now-A Guide to Planning Ahead", "Survivor's Checklist - First Steps for Moving On", "Your Guide to Military Burials", and many others. She also initiated the distribution of the Annual Personal/Financial Affairs - Planning Ahead Checklist Reminder, which provides additional reminders about updating wills, new IDs cards, password lists, and general items for members to have readily available for a trusted someone in case of debilitating illness or death.

**Section 3: Extra Credit.**

- 1. Describe the Chapter's most significant achievement of the year.**
- 2. Identify and briefly describe an above and beyond management practice or program that has not been already covered in the award submission.**

**Chapter's Most Significant Achievement of the Year**

In the community engagement portion of the submission, we mentioned the relationship that we have established with the Veterans' communities at both Belmont and Lipscomb Universities. This ongoing personal relationship resulted in our being contacted by Lipscomb University in April 2017 with an offer that would allow the Chapter to assume responsibility for existing endowed scholarship funds (\$4600) which had been allowed to go dormant by the donating organization. The only stipulation was that we had to be willing to continue to build upon a fully funded scholarship. It is hard to ignore "found money" so we have now committed to build a fully funded endowed Veterans' scholarship at Lipscomb University that will utilize the same basic award criteria that we had established for our \$1000 grant. The beauty of this situation is that the Lipscomb leadership is willing to allow the Chapter to contribute to the fund at any point in time and build the balance with no time stipulations. Once the balance meets the \$25,000 it can be utilized to distribute annual scholarships. We were able to contribute \$2000 to this fund in 2017, partly as the result of a generous contribution (\$1000) from a Trust established by the family of a long time MTC member who passed away in 2013.

**Above and Beyond Management Practice or Program**

Our Chapter has designated the January meeting each year as an Organizational meeting, designed to provide a review of the prior year, as well as provide a forum for any member to suggest programs, additional outreach opportunities, or just voice their opinion about the Chapter in general. I have attached a copy of our most recent annual report (for the year 2017) so that you can see how we approach the year in review. Of particular interest is the four year financial comparison which provides our membership with an opportunity to evaluate the results of our Board's fiduciary responsibility. This document is discussed in detail at our meeting, and then is placed on our website for evaluation and

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review by our membership that was unable to make that particular meeting. This meeting and this process have proven to be of great interest to our membership over the past years.