



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

29 April 2019

MOAA
Council & Chapter 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" addendum to our application for the 2018 calendar year.

This addendum is our complete submission with pictures and additional verbiage which we feel more accurately describes the activities of our Chapter for 2018. We understand MOAA Council and Chapters would like to have every submission in a similar format for judging; however, we feel that this document should be the actual one reviewed for the Level of Excellence Award as it provides a much more complete picture of our Chapter. This will be the version that we share with our Chapter members.

Respectfully,

//Signed//

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

Chapter Notes on the “Objective” Portion of the Evaluation

1. All Middle TN Chapter (MTC) Chapters Officers are members of MOAA National.
2. Our Chapter continues to struggle with the process of aligning Chapter membership with MOAA Basic Membership. This should be an easy process that allows Chapter rosters to match with the Committee Module (CM) to create virtually automatic MOAA National members. Unfortunately concerns over individual email addresses provided by Chapter members does not allow this to occur so, we are continuing to urge, suggest, and entice members to get them to complete the multiple steps necessary to achieve this goal. This will be an ongoing endeavor for the Chapter, and we will continue to stress the importance of MOAA National membership to everyone that joins our Chapter.
3. We update the Committee Module as changes to our leadership or additions to our membership take place.
4. Updates occurred as changes were necessitated.
5. Our MTC Legislative Chair changed in May 2018 with LTC (Ret.) Doug Gilbert, USA assuming the position of Legislative Chair. He receives the MOAA Newsletter and reports that he did select “advocacy” when he took that position.
6. COL (Ret.) Doug Minton, USA continues as our MTC Membership Chair, and continues to work with Councils & Chapter Affairs on enhancements to the CM.
7. We are fortunate to have Mrs. Patricia Bergquist continue to serve as our MTC Surviving Spouse Liaison, and yes, she is recorded appropriately in the CM.
8. Our Chapter has successfully received National and Travel funds using EFT since its inception at MOAA.
9. Our Chapter is honored to have three Chapter members serving as officers of the Tennessee Council of Chapters: President (COL (Ret.) Doug Minton), Secretary (Mrs. Patricia Bergquist), and Treasurer (COL (Ret.) Bob Bussey, USA). We have belonged to this organization and actively participated since its inception in 1968. We have also had active participation from our Chapter by CDR (Ret.) John Ohlinger, USN who is a past Council President.
10. CAPT (Ret.) Dale Lewelling, USN serves as our President and has confirmed that he is opted-in to receive the MOAA Newsletter.

Chapter Submission on the “Subjective” Portion of the Evaluation.

Section 1:

1. Grassroots Advocacy

On 7 February 2018 the Tennessee Veterans Coalition undertook its second *Storming the Hill – TN* event. While still in a developmental stage the un-official organization was reasonably successful in presenting and discussing issues at this event. MTC MOAA was represented by LTC (Ret.) Mike Patenaude, USA, COL (Ret.) Kent Crossley, USA, CDR (Ret) Jaime Hernandez, USN, LTC (Ret.) Thad Vann, USA, COL (Ret) John Furgess, USA and COL (Ret.) Doug Minton, USA at the event.

The five bills supported by the Coalition included:

1. Title: **Property Tax Relief for Disabled Veterans During Temporary Relocations.**
2. Title: **Stolen Valor.**
3. Title: **Procedures for Naming State Veteran Homes and Associated Buildings and Grounds.**
4. Title: **Appointment of a veteran member to the statewide planning and policy council for the department of mental health and substance abuse services.**
5. Title: **Selecting veterans to serve on State University and Community College Board of Regents.**

Of the five bills supported by Coalition in 2018, unfortunately none were successful. On a positive note, a property tax exemption which had been reduced from the first \$175,000 of value to \$100,000 was raised back to \$175,000 of value. It still requires however, the veteran to be 100 % disabled.

In April 2018 our monthly Newsletter contained an article explaining how Chapter members could actively support the MOAA “Storming the Hill” initiative, and this led to increased awareness at the local offices of our elected officials which translated to increased awareness of the MOAA issues at the House and Senate level. Only two TN constituents participated on the 2018 MOAA Storming the Hill team for TN; COL (Ret.) Doug Minton – TN Council of Chapters President and Mrs. Patricia Bergquist, Surviving Spouse Advisory Committee Member.

2018 was an election year at both State and Federal levels, with a great deal of turnover at both levels for officials in our Chapter’s geographic area. The MTC Board of Directors chose to avoid individuals running for office as speakers for our monthly meetings and published the following message to our membership in our July 2018 Newsletter:

“The Middle TN Chapter Board and Membership has a mandate to always remain politically nonpartisan as an affiliate organization of MOAA National. Normally during this time of the year, we would organize visits to our elected officials when they are

home during Congressional break or when the TN State Legislature is out of session. However, this being an election year we are unable to accomplish these tasks without being drawn into the election fray.

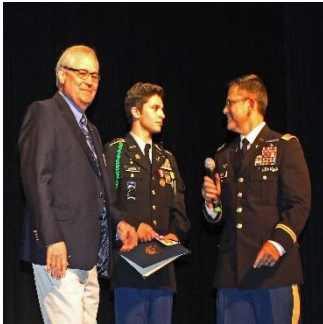
So, while the Chapter cannot become actively involved in supporting a candidate, we whole heartedly support the individual involvement of our members on a personal basis. An informed and active electorate is important to the success of our state and nation, so it is up to each of us to become informed on the issues and to VOTE, and to encourage all that you know to do so as well. “

2. Community Engagement

ROTC/JROTC Support

Our Chapter continued its support of local area ROTC programs at Vanderbilt University (NROTC and AROTC) and Tennessee State University (AFROTC). We presented the MOAA ROTC Leadership Award to deserving Cadets/Midshipman at both schools during their spring awards programs. Unfortunately, no photos of the presentations were available. Orientation meetings were held with all three new detachment commanders during the Summer by our ROTC Support Coordinator, Lt. Col. (Ret.) Karon, Uzzell-Baggett, USAF.

We also continued to support the JROTC program at fourteen 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 twelve of the schools we support in 2018.



(Pictured at right – CAPT (Ret.) Larry Cotton, USN the MTC JROTC Support Coordinator making the MOAA JROTC Leadership Award presentation at Page High School on 4/24/2018.)

(Pictured at left – LTC (Ret.) Doug Gilbert making the MOAA JROTC Leadership Presentation at Ravenwood High School on 5/4/2018.)



We also provide all ROTC/JROTC Instructors with a complimentary Chapter membership, and then actively pursue their taking advantage of that membership. We are moderately successful in that endeavor, but when we are, we find it much easier to then get them to connect with MOAA National as well.

Scholarship

Our Chapter continues to provide two local grants of \$1000 each for Veterans attending Belmont University and Lipscomb University, for students falling into the categories of: permanently wounded/disabled Veterans, combat wounded Veteran (Purple Heart), or failing to find one of the previous categories, a deserving Veteran. Both programs are administered by the Veterans Services Departments at these universities.

We also provided financial support to the MOAA National Scholarship Program with a \$1000 unattached contribution in 2018.

Our relationship with Lipscomb University led to an unforeseen opportunity which was finalized this year when the school transferred \$4678 in dormant scholarship funds into an agreed upon endowment account which we will build to a fully endowed scholarship. This scholarship, when fully funded will be named the Middle Tennessee Chapter of the Military Officers Association of America Endowed Veterans Scholarship. This opportunity is open ended in that we are not on a timeline to build the funds to the desired endowment level. We contributed an additional \$2080 to this account in 2018.

Middle TN Chapter Memorial Day Ceremony

Our annual Memorial Day remembrance at the Middle Tennessee Veterans Cemetery, was held this year on May 26, 2018; with assistance from the Nashville Naval Operations Support Center Ceremony Detail, and the Staff of the Middle Tennessee State Veterans Cemetery.



(Pictured at left – LTC and Mrs. Doug Gilbert, USA; CDR (Ret.) John Ohlinger, USN; Col. (Ret.) Duffy White, USMC, Speaker Beth Harwell; COL (Ret.) Tom Feuerborn, USA; COL (Ret.) Doug Minton, USA; BG (Ret.) Pat Harrison, USA; LTC (Ret.) Mike Patenaude, USA and Family member; CAPT (Ret.) Larry Cotton, USN and Family

member; Capt. And Mrs. Hal Sauer, USAF; Mrs. Patricia Bergquist, Surviving Spouse; Mrs. Lynn Womack, Surviving Spouse; and Major (Ret.) Wayne Plump, USAF.)

MOAA Family Initiative (MOAA Foundation)

Although not local community outreach, our Chapter continues its support of the MOAA Military Family Initiative through the MOAA Heritage Society, providing a contribution of \$250 in June 2018. Our records indicate that we have now contributed \$1125 to this very worthwhile national program.

Operation Stand Down TN (OSDTN)

On April 24 COL (Ret.) John Krenson, USA & CEO OSDTN spoke to the Chapter and provided an update on the growth of the organization over the last 25 years as a result of the changing demographic that is its focus. While they continue to assist homeless veterans, they have expanded their services to better meet the needs of the post 9/11 veterans.

Our Chapter has been a longtime supporter of OSDTN, and on this date we provided a contribution of \$250 following COL Krenson's presentation. (Pictured at right – Lt.Col. (Ret.) Arlie Haddix, USAF; Col John Krenson, USA; CAPT Dale Lewelling, USN and COL Kent Crossley, USA.)



We also supported them again this year as a table sponsor at the Heroes Breakfast on September 14th at the Music City Center in Nashville. We had eleven members/guests attend the fundraiser; however, our picture failed to capture all of them. (Pictured at left- LTC Rick Frank, USA - Nashville Army Recruiting BN Commander; LTC (Ret.) Mike Patenaude, USA; and CAPT (Ret.) Larry Cotton, USN.)

USO Ft. Campbell – 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 2018 our In-Kind Donation totaled \$239.04. (Pictured at right – with our in-kind donation- Ms. Tammy Bass, Center Manager and COL (Ret.) Doug Minton, USA.) Our current volunteers are: COL (Ret.) John Phillips, USA; COL Doug Minton and his wife Janice; LTC (Ret.) Wanda Bruce



Graham, USA and her husband MSG (Ret.) Bill Graham, USMC; CPT Art Jacobs, USA; Capt. (Ret.) Bob Jones, USAF; LTC (Ret.) Tom Carr, USA; and LCDR (Ret.) Bruce Kincaid, USN.

In October 2018, Ms. Kari Moore, Center Director, USO Nashville and USO Fort Campbell spoke to the Chapter to express appreciation for our support, and to provide an update on the achievements of USO Ft. Campbell – Nashville during the previous twelve months. (Pictured at left – Ms. Kari Moore.)

USMCR Toys for Tots

On November 27, 2018 the Chapter collected toys for the Marines of Kilo Company 3/23, USMCR in support of their annual Toys for Tots program in Middle Tennessee. (Pictured at right – toys collected)



Academy Admissions Selection Boards

Chapter members continued to participate on a variety of levels in 2018 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 (Ret.) John Ohlinger, USN continued his duties with the Congressional Academy Selection Committees for the 5th and 7th Congressional Districts; and COL (Ret.) Doug Minton, USA; CDR (Ret.) Mike Neuser, USN; COL (Ret.) Kent Crossley, USA; and CAPT (Ret.) Dale Lewelling, USN all served on the Congressional Academy Selection Committee for Senator Bob Corker of TN.

Centerstone Military Services



The Chapter presented a check for \$250 to Dr. Jodie Robison, Executive Director of Centerstone’s Military Services (CMS) in September 2018. CMS provides no cost mental health counseling to Service Members, Veterans and their families nationally and now internationally. Primarily an in-person treatment program focused on PTSD causing Veteran suicide, CMS provides tele-health care to those unable or unwilling to travel to an office environment. They also provide mental health related retreats to spouses and families. (Pictured at

left- CAPT(Ret.) Dale Lewelling, Dr. Jodie Robison, CMS Executive Director, and COL (Ret.) Kent Crossley)

Mathew 25

Mathew 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. In October 2018 the Chapter made a cash Contribution to Mathew 25 in the amount of \$250 to support their ongoing programs.

In addition to those organizations which we fund with contributions, 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”, and “The Mission

Continues". Each of these organizations provide support to veterans or their families in our local community.

3. Recruiting and Retention

Our Chapter Recruiting is dependent upon two sources of attracting prospective members. First is "word of mouth" recruiting by existing members. Second is recruiting based on prospective members visiting on our website. In 2018 we attracted eighteen new members, 60% from word of mouth from our existing membership, and 40% from prospective members that have moved into the area and first noticed us on the website.

Our Chapter offers the *Year of Joining* free to new members, so that they are given time to make the decision on whether we are a good fit for them, before they must hand over any funds. Our meetings occur in the form of a luncheon and speaker, and although we have lost a few first-year members who would prefer a more social meeting, most of our new members enjoy the camaraderie and a good speaker.

Our retention plan starts with our programs. We encounter many former and retired officers in the Middle TN area and most re-connect with the military camaraderie easily. Our efforts continue as we engage our members with our community by inviting influential community leaders and personalities as guests at our monthly luncheons to provide insights and generate discussion. Some examples in 2018 were: Nashville Chief of Police Steve Anderson, President of the Nashville Predators NHL Team Sean Henry, Tennessee State Commissioner of Veterans Services COL (Ret.) Many-Bears Grinder, USA and Tennessee State Medical Examiner CAPT/Dr. Julia C. Goodin, USN.

Our Chapter is also working to address the needs of the post 9/11 officer as they transition from active duty. Having an active Transition Services Officer (Lt. Col. (Ret.) Arlie Haddix, USAF) has made us aware of this growing population of potential members; who are frequently not familiar with MOAA and are seeking more than just military camaraderie as they work to build their transition network.

I think it is worth saying that we know that the current veteran population has different needs and that the chapter is adapting to those needs

We collect funds twice a year, as dues and in support of our scholarship programs. We support several community outreach organizations with monetary contributions in the \$250 range and our membership seems to be pleased with the amounts and the organization which we support.

Retention for our Chapter is a simple endeavor; provide our members an effective way to belong to an organization that continues to serve the greater veteran's community.

For Active Duty and Reserve/National Guard offices in the area we have learned they should be invited to join, they should be introduced to MOAA; but that they lead busy

lives, and we should not anticipate that they will be able to actively participate on a regular basis. We are grateful for those that can connect, and genuinely try to foster that relationship.

Section 2:

1. Chapter's Leadership Succession Plan

Our Board is our leadership lab; we invite members to meet with the Board, be active, join the Board and then work their way into the succession plan beginning at 2nd VP. Like many Chapters we had often struggled in the past with enticing members to assume leadership roles; however, by 2011 we had established a succession plan and it has been going strong ever since.

Our current President is the fourth person serving in this role (two-year terms) since the plan was put into action. Our Past Presidents are active in the Chapter and provide a



good sounding board for potential Board/Officer candidates as new members join the Chapter.

(Pictured at left: Past President CAPT (Ret.) Dana McClendon, USN conducting our Change of Command ceremony as then President CAPT (Ret.) Larry Cotton, USN turns over the Presidency to our current President CAPT (Ret.) Dale Lewelling, USN on January 23, 2018)

2. Personal Affairs Program

The chapter has an active Personal Affairs Officer in LTC (Ret.) Wanda Graham, who is also a past president of our chapter. She provides an annual program for our members and in 2018 the program occurred on 27 February featuring Mr. Richard Littlehale, who is the Tennessee Bureau of Intelligence (TBI) Agent in Charge, Technical Services Unit. His presentation dealt with Cyber Security, which is a topic that affects everyone, whether it be at a personal level or at the level of services provided by our banks, grocery stores or other retail outlets that we use. It was a full house and a very interesting discussion/presentation.

In addition to her annual program, LTC Graham is very proactive in reminding everyone that MOAA Annual and Life membership makes you eligible to receive a wide range of guides on personal affairs.

Section 3:

1. Chapter's Most Significant Achievement in 2018

We believe that our most significant achievement for 2018 will probably be the level of trust that we established with Lipscomb University that enabled us to become the

owner of funds that lay dormant in the Lipscomb Scholarship portfolio, thereby enabling the Chapter to get a jump-start on the creation of a fully endowed scholarship for veterans. That trust was established between the Veterans Services Department and our Chapter, by a string of Scholarship Chairs beginning with CAPT (Ret.) Dana McClendon, USN and continuing with LTC (Ret.) Mike Patenaude, and now residing with COL (Ret.) Kent Crossley. Our Chapter actively supports this initiative during our scholarship fund raising drive.

2. Chapter's Above and Beyond Management Practice/Program

Our January meeting provides an opportunity for our Chapter President to provide a "State of the Chapter" report covering the variety of activities and initiatives in which we have invested both time and funds during the previous calendar year. The ability to provide a clean accounting of funds expended in the prior year allows us to highlight the outreach organizations and activities that we support through contributions. Our transparency is something that our membership has begun to expect, and it ensures that the members play a role in who we support and at what level.

It also provides an excellent time to review our programs, and then view what our Program Chair has begun to put together for the upcoming year. This is the ideal time for our members to make suggestions for topics/speakers of interest to them! It is a good measurement for where our programs have been and where they are headed, and again our members have begun to appreciate this level of visibility and openness.