



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

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

22 April 2020

Ladies and Gentlemen,

On behalf of the Middle Tennessee Chapter it gives me great pleasure to submit our "Level of Excellence Award" addendum to our application for the 2019 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 2019. 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//

Mike Patenaude
Lieutenant Colonel (Ret.) USA
President, Middle TN Chapter, MOAA

Chapter Notes on the “Objective” Portion of the Evaluation

1. All Middle TN Chapter (MTC) Officers are members of MOAA National.
2. At our last reckoning, 96% of our members belonged to the MOAA National organization. This includes the 30 members that have joined as Basic Members over the last six months. To arrive at this percentage we have removed from the Committee Module all Emeritus members that do not use email or have internet access, as well as all complimentary Chapter memberships (JROTC Instructors and ROTC Instructors) that have chosen to not join MOAA during their assignment in these positions. This has reduced our Chapter Membership in the MOAA Database (CM) to 231 members, although we carry 260 members on our Chapter rolls.
3. All membership updates to the Committee Module were accomplished prior to 31 March 2020. For this submission our last member selected to choose Basic membership on 23 March 2020.
4. Updates to our Chapter Officers were accomplished in January 2020 when our leadership changed.
5. LTC (Ret.) Doug Gilbert, USA is our Legislative Chair, and he was updated appropriately in the CM when he assumed that role. 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 has been updated as such in the CM.
7. We are fortunate to have Mrs. Patricia Bergquist continue to serve as our MTC Surviving Spouse Liaison, and has been updated as such in the CM.
8. Our Chapter has successfully received National and Travel funds using EFT since the inception of this program at MOAA.
9. Our Chapter is honored to have two Chapter members serving roles in the Tennessee Council of Chapters: Immediate Past President (COL Doug Minton) and Surviving Spouse Liaison (Mrs. Patricia Bergquist). We have belonged to this organization and actively participated since its inception in 1968.
10. LTC (Ret.) Mike Patenaude, USA Retired, is our current President and has confirmed that he is opted-in to receive the MOAA Newsletter.

Chapter Submission of the “Subjective” Portion of the Evaluation:

Section 1:

1. Grassroots Advocacy

On 6 February 2019 the Tennessee Veterans Coalition undertook its third *Storming the Hill – TN* event. The beginning of this legislative session was compressed by the inauguration of our new Governor combined with new bill submission rules which resulted in less available time with each of our legislators. Nonetheless, we managed a strong showing and met with many of our legislators. Our Chapter was represented by



the officers shown in the photo at left (from left to right) COL (Ret.) Doug Minton, USA; LTC (Ret.) Mike Patenaude, USA; Lt. Col. (Ret.) Karon Uzzell-Baggett, USAF; COL (Ret) John Furgess, USA; and COL (Ret.) Kent Crossley, USA. LTC (Ret.) Thad Vann, USA was also present but missed the photo opportunity; and COL (Ret.) Sam Whitson, USA was there in his capacity as

an elected member of the House of Representatives, where he represents the 65th District.

On 10 April 2019 the TN MOAA team (consisting of COL Doug Minton, Mrs. Patricia Bergquist, and Col. (Ret.) Don Thompson, USAF – a MOAA Board member and also a member of the Mountain Empire Chapter in Johnsonville, TN) was able to successfully visit/lobby the entire TN Congressional Delegation on behalf of MOAA’s 2019 legislative goals in Washington, DC.

(Pictured at right- the TN Team with Senator Marsha Blackburn). In concert with the MOAA “Storming the Hill” event, the Middle TN Chapter made a concerted, ongoing effort to have its members use the MOAA Legislative Action Center to remind their representatives to actually vote for the issues that they said they would support when visited in April.



On 13 August 2019, MTC Members LTC (Ret.) Doug Gilbert, USA, Mrs. Patricia Bergquist, LTC Mike Patenaude and LTC Thad Vann, met with Senator Lamar Alexander and Mr. Will Patterson (Legislative Assistant for Defense and Veterans Issues) in Nashville, TN to discuss MOAA concerns, key of which was Senator Alexander’s ongoing support for the elimination of the SDP-DIC Offset (Widow’s Tax) as well as the effort to sustain military pay and quality of life standards as Congress prepared for Conference Committee negotiations on the 2020 NDAA.

On 15 August, MTC Members LTC Doug Gilbert, CAPT (Ret.) Dale Lewelling, USN, LTC Mike Patenaude, Mrs. Patricia Bergquist and COL Kent Crossley, met with Mr. John Clement of Senator Blackburn's Nashville Staff to discuss the same issues stated above.

Also, of note, Mr. John Clement (Senator Blackburn's office) and Ms. Patti Carroll (Congressman Greens' office) attended our 27 August monthly meeting as guests as part of our ongoing effort to familiarize their offices with MOAA.

Our Chapter membership joined all military members and families and particularly Military Surviving Spouses in the celebration that occurred when the 2020 NDAA was finally enacted as law on 20 December 2019. And most importantly, we celebrated the tireless effort and amazing drive of our own Mrs. Patricia Bergquist who so doggedly pursued the elimination of the SDP-DIC Offset (Widow's Tax) for all those years when it seemed no one was listening.

2. Community Engagement

Scholarship

Our Chapter continued to provide two 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 or child of a Veteran. Both programs are administered by the Veterans Services Departments at these universities.

We continued to build on a local endowment for what will become the Middle Tennessee Chapter of the Military Officers Association of America Endowed Veterans Scholarship at Lipscomb University. 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 \$2374 to this account in 2019.

We also continued to build on our 4th MOAA National Scholarship for dependents endowment with a gift of \$1,000. We currently have funded \$6,000 toward our 4th \$25,000 Endowment. We have already funded three (3) \$25,000 endowed scholarships for the MOAA National Scholarship program.

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, we failed to acquire photos from any of the three programs. Orientation meetings were held with all three detachment commanders at the beginning of the Fall Semester by our ROTC Support Coordinator, Lt. Col. Karon Uzzell-Baggett.

Our Chapter continues to support the JROTC program at fourteen High Schools in our greater geographic region. The MOAA JROTC Leadership Award was presented in person by five different MTC MOAA members at awards ceremonies and unit military balls at twelve of the schools we support in 2019. (Pictured at right – CAPT (Ret.) Larry Cotton, USN our Chapter JROTC Support Coordinator making the MOAA JROTC Leadership Award presentation at Creekwood High School on 4/19/2019.)



(Pictured at left – COL Doug Minton making the MOAA JROTC Leadership Presentation at Springfield High School on 5/18/2019.)

We also offer all ROTC/JROTC Instructors 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 extend the process to MOAA National membership as well.

Middle TN Chapter Memorial Day Ceremony

Our annual Memorial Day remembrance at the Middle Tennessee Veterans Cemetery, was held this year on 25 May 2019 with assistance from the Staff of the Middle Tennessee State Veterans Cemetery. Photo after the event is shown at right.



MOAA Foundation

Although not local community outreach, our Chapter continues its support of the MOAA Foundation through the MOAA Heritage Society, providing a contribution of \$250 in May 2019. Our records indicate that we have now contributed \$1375 to this very worthwhile national program initiative.

Operation Stand Down TN (OSDTN)

Our Chapter has been a longtime supporter of OSDTN, and we provided a contribution of \$250 to COL (Ret.) John Krenson (CEO) this year at the annual OSDTN Heroes Breakfast on September 9th at the Music City Center in Nashville, TN. We also supported them at the event as a table sponsor. We had a full table of MOAA members, but they seemed to go their separate ways before we could get a group picture. (Pictured at left- LTC and Mrs. Doug Gilbert; and LTC Mike Patenaude) We also counted approximately 16 other Chapter members who were present but sitting at other organizational tables. Our Chapter is pleased to count the COO at OSDTN (Brig. Gen. (Ret.) Eden Murrie, USAF), the Career Services Manager at OSDTN (Lt. Col. (Ret.) Arlie Haddix, USAF) and two members of the Board of Directors at OSDTN (Capt. Bob Tuke, USMC and LCDR (Ret.) Dave Ford, USN) as active Chapter members.



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 contribution. In 2019 the center at the Nashville airport was relocated for construction purposes and they lost most of their storage capacity. As such rather than our normal In-Kind Donation, we presented USO Fort Campbell/Nashville with a check for \$250 in May 2019. We continued to provide a number of members as USO Volunteers: COL (Ret.) John Phillips, USA; LTC (Ret.) Wanda Bruce Graham, USA and her husband MSG (Ret.) Bill Graham, USMC; CPT Art Jacobs, USA; Capt. (Ret.) Bob Jones, USAF; COL Doug Minton and his wife Janice; LTC (Ret.) Tom Carr, USA; and LCDR (Ret.) Bruce Kincaid, USN.

USMCR Toys for Tots

On 19 November 2020 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 2019 in support of Service Academy appointments. Capt Hal Sauer, USAF 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 LTC Ryan Cernoch, ARNG; 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 Marsha Blackburn of TN.

Centerstone Military Services

Dr. Jodie Robison, Executive Director of Centerstone’s Military Services (CMS) spoke to our Chapter at our 22 October meeting; bringing us up to date on their growing ability to provide no-cost mental health counseling to veterans, AD and family members for veterans and their families in 44 Counties in Tennessee and Kentucky. Following her presentation, Chapter President CAPT Dale Lewelling presented Dr. Robison with a check for \$250. (Pictured at right- CAPT Dale Lewelling and Dr. Jodie Robison, CMS Executive Director.) At this meeting Col. Keith Allbritten, Commander of the TN Air National Guard



118th Wing and our newest Chapter member as of that date provided an unsolicited testimonial concerning the efficacy of the counseling provided to members of his Wing during his service there. Pictured at left – Dr. Robison, Col. Allbritten, and CAPT Lewelling.)

Matthew 25

Matthew 25 is a nonprofit agency providing transitional housing, structured programs, job placement and referral services 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. At our 19 November meeting the Chapter made a cash contribution to Matthew 25 in the amount of \$250 to support their ongoing programs. (Pictured at right – CAPT Dale Lewelling and Mr. Matthew Gray, Executive Director, Matthew 25 – Nashville.)



Other Community Organizations MTC Supports

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 recognizing numerous members who have become actively 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 veteran support and engagement in our local community.

3. Recruiting and Retention

Our Chapter Recruiting is dependent upon two sources of attracting prospective members: "word of mouth" recruiting by existing members and prospective members who find out about us through our website. In 2019 we attracted twenty new members using a combination of these methods. We increase our appeal to prospective members by reducing their concern of cost or concern of incurring a new obligation of which they are unsure. We do this through our "Year of Joining" free membership 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. Once dues are in order, we collect dues of \$20 for regular members and \$5 for Surviving Spouse members. As stated earlier we offer complimentary memberships to officers assigned to our geographical area as a tour of duty, primarily ROTC and JROTC instructors, and Recruiting Command officers (while we rarely are able to get these members to actively participate, this arrangement does allow us to push to get them to become National MOAA members through the Basic membership program). We have several members who have arrived at that point of life through either age or physical condition that we carry as Emeritus members; the vast majority of which have had a longtime affiliation with the Chapter. We do not charge these members' dues.

Our Chapter retention goal is straightforward; to provide our members effective opportunities to serve veterans while providing greater connection with fellow military officers and the greater Middle Tennessee community. We encounter many former and retired officers in the Middle TN area and most re-connect with the military camaraderie easily. Our retention plan begins with our monthly programs, as we engage our members by inviting influential community leaders and personalities as guests at our monthly luncheons to provide insights and generate discussion. Our only fundraising involves collecting dues once a year and soliciting scholarship contributions. Our scholarship activity is funded completely through member contributions, and we support several community outreach organizations with funds collected as dues each year.

Our Chapter has also initiated efforts to address the needs of the post 9/11 officer as they transition from active duty. Having an active Transition Services Officer (Lt. Col. Arlie Haddix) has increased our awareness 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.

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 as initiative chairs (scholarship, ROTC support, JROTC support, etc.) then moving to 2nd VP as an understudy, 1st VP as Program Chair and eventually President.

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 fifth 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.

2. Personal Affairs Program

The chapter has an active Personal Affairs Officer in LTC Wanda Graham who is also a past president of our chapter. She provides periodic personal affairs updates for our members, an annual Personal Affairs program, and makes herself available to all members throughout the year to address specific questions/concerns.

In 2019 the program occurred on 23 April and featured Ms. Barbara Moss, an attorney specializing in Elder Law (pictured at right). Her practice is focused on elder law, conservatorships, probate, estate planning, Medicare, and Medicaid. Her presentation lead to an excellent Q and A session and left many us keenly aware that we had some work to do.

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



Section 3:

1. Chapter's Most Significant Achievement in 2019

The fact that MOAA Council and Chapters was able to produce a common join form to be used by Chapters to generate Chapter membership as well as MOAA National Basic membership, and the newly granted ability to use Chapter data and verbal authorization for Basic membership enabled our Chapter to generate **15** new MOAA National Basic members during the last quarter of 2019. Chapters needed these tools and when they became available, we were able to put them to use. The fact that 95% of a Chapter's members had to have MOAA National Membership for the Chapter to be

eligible for the MOAA Levels of Excellence Award was a powerful incentive, but equally as important was MOAA's awareness that National membership numbers were of enough value that they removed Basic membership term restrictions.

Our Chapter had struggled with how to get many of our former officer members to join MOAA and pay dues when they saw little return on the funds outlay. Once the Basic program was open to everyone without term limitation, then the Chapter had a sales tool to use to increase MOAA National membership. So, yes this has been a significant achievement for us, but equally so for MOAA National!

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

The quality of our Chapter's monthly speakers has long been a draw for existing and new potential members. While the camaraderie factor is important, we believe the quality of our programs/speakers is the draw that gets members into chairs at the monthly meetings.

In 2019 our programs were as follows:

January – MTC Annual Report (Accountability to our members).

February – Former FBI Special Agent Matt Dunn (the job of the FBI).

March – CPT Dean Wegner – Former Army officer, and current Chapter Member – (*Authentically American* apparel initiative).

April – Attorney Barbara Moss – Elder Law (Personal Affairs Program).

May – COL Sam Whitson – Chapter Member & District 65 State Representative (TN State Government).

June – CPT (Ret) Jerry Neal, USAF – Chapter Member & WWII Bomber Pilot on D-Day.

July – Lt. Brett Sweet – Former USN officer, Chapter Member and current Vice Chancellor at Vanderbilt University (Bass Military Scholars Scholarship Program at Vanderbilt University).

August – MAJ (P) Jay Outen, USA – 101st Chaplain (Lessons learned as an Army Chaplain).

September – Capt.(F) Dan Thomas, USAF – Former USAF Meteorologist and now Local TV Meteorologist – (the weather and science).

October – Dr. Jodie Robison – CEO Centerstone Military Services (Outreach that MTC supports).

November - Curt Stacey – CEO of Team Equine Therapy (an initiative supported by Matthew 25 – which is an outreach that MTC supports).

With a mix of accountability, instruction, innovation, legal expertise, legislative humor, riveting WWII D-Day reality, scholarship, religious humility, science, and evidence that outreach has definite value; it is no wonder that we averaged 42 members at every meeting in 2019. We consider this to be a particularly good average turnout for our Chapter and hope that we can continue to grow this number in 2020.