



North Texas – Audie Murphy Chapter Association of the United States Army

Chapter Annual Plan 1 July 2023 to 30 June 2024

Chapter Vision

Be a leading voice for the Army, our Soldiers and their Families across North Texas. Be recognized as a “Go-To” organization for issues involving soldiers and their families in the area.

Chapter Values

Innovation | Responsiveness | Inclusiveness | Excellence | Integrity

Chapter Mission

Educate. Inform. Connect. We serve those who have served our Nation.

A. Chapter Objectives and Goals

1. Objectives

- **Be the Acknowledged Voice for the US Army** (Active, Reserve and National Guard), soldiers and Army families across the North Texas - Audie Murphy Chapter area of responsibility (AOR).
- **Be the primary Source of Information and Opportunity** for chapter members to become aware of, and participate in, activities providing support to our constituencies.
- **Create Soldier for Life opportunities** that enable our members to “remain in the fight” as active, relevant members of our Army.

2. Goals

- a. Increase Individual Memberships by **5%**
- b. Increase Community Partners by **5%**
- c. Raise **\$50,000** for designated Wounded Warrior programs.
- d. Attain Best Chapter status.

B. Proposed Activities

1. General Membership Meetings (Responsibility of the President); General membership meetings are planned a minimum of four times during the year. They will provide opportunities for team building and increased communication, as well as furthering the objectives of the chapter and the AUSA. Families, spouses, and guests (with or without military or Army background) are invited and encouraged to attend. The following General Membership Meetings will be held quarterly during the operational year:



North Texas – Audie Murphy Chapter Association of the United States Army

a. First Quarter Meeting – September 13, 2023

Time: 7:45 a.m. to 9:00 a.m.

Action Officer: Mr. Bob Epstein (Community Partner Director)

Alternate: Colonel (ret.) Richard Kaniss, USA (Executive Director and Past President)

Purpose: The purpose of this meeting is two-fold: (1) to increase membership by 5% and (2) demonstrate the value of an AUSA membership (Educate, Inform) and relationship (Connect). Also, attendees will be encouraged to volunteer participate in Veterans Day Parade in November and to place wreaths at gravesides in December. Prior to the event, marketing communications (marcom) promoting the event will be created and launched. Marcom items will include sending Pardots, posting on social media, and sending out flyers. Nonmember guests will be encouraged to join the chapter and provided a membership application to complete. Educate | Inform | Connect (Potential Points: Membership Drive, Community Partner Membership Growth, Volunteer Drive) – Educate | Inform | Connect

Guest Speaker: Colonel J.P. Hogan, USA, Retired (AUSA IV Region Executive Director and Vice President, Leadership Programs - NTAM)

Topic: *Military History Book Review: The Art of Command: Military Leadership from George Washington to Colin Powell*

b. Second Quarter Meeting – December 7, 2023

Time: 6:00 p.m. to 9:00 p.m.

Action Officer: Dr. Patti McCoy, Capt, USAF (served) (President, AUSA North Texas – Audie Murphy Chapter)

Alternate: Colonel (ret.) Jeff Gault, USA (EXCO Board Member)

Purpose: The purpose of this meeting is to build and strengthen Community Partner relationships. The meeting will focus on the chapter's community partnerships by recognizing the chapter's community partners for their support, untiring commitment, and dedication to sponsoring the chapter's programs. Recruitment and support for employers that hire Guard and Reservists will be discussed. Community Partners will be awarded a certificate of appreciation and an AUSA Coin. Community partner prospects and member prospects will be invited. Special Guests invited include Honorable Keith Self and Honorable Michael Burgess. New members will be recognized. Nonmember guests will be encouraged to join the chapter and provided a membership application to complete. Prior to the event, marketing communications (marcom) promoting the event will be created and launched. Marcom items will include sending Pardots, posting on social media, and sending out flyers. **Educate | Inform | Connect** (Potential Points: Community Partner Membership Growth, Membership Meeting, Advocacy (formerly Take the Hill))

Guest Speaker: Captain (ret.) Marc Liebman, USN, Author and Professional Speaker

Topic: Pearl Harbor Remembrance Day



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c. Third Quarter Meeting – January 20, 2024

Time: 5:00 p.m. to 8:00 p.m.

Action Officer: Dr. Patti McCoy (President, AUSA North Texas – Audie Murphy Chapter)

Alternate: Colonel James P. Hogan, USA, Retired (AUSA IV Region Executive Director and Vice President, Leadership Programs - NTAM)

Purpose: The purpose of this meeting is to bring together local experts, community leaders, concerned citizens, and military nonprofits to discuss current national defense strategies, potential threats, and measures being taken to ensure the safety and security of our nation. The meeting will feature the keynote speaker Honorable Keith Self and panel discussions, providing attendees with valuable insights and an opportunity to engage in meaningful conversations about the role of national defense in our community. Mr. Darcy Anderson, Civilian Aide to the Secretary of the Army and Vice Chairman, Hillwood Properties will receive the Defenders of Freedom Award from the National Defense Briefing Series organization. Prior to the event, marketing communications (marcom) promoting the event will be created and launched. Marcom items will include sending Pardots, posting on social media, and sending out flyers. **Educate | Inform | Connect** (Potential Points: Membership Drive, Membership Meeting, Advocacy (formerly Take the Hill))

Suggested Guest Speaker: Honorable Keith Self, Congressman, 3rd District Texas

Topic: National Defense

d. Fourth Quarter Meeting – April 4, 2024

Time: 11:00 a.m. – 1:00 p.m.

Action Officer: Colonel James .P. Hogan, USA, Retired (AUSA IV Region Executive Director and Vice President, Leadership Programs - NTAM)

Alternate: Colonel (ret.) Jeff Gault, EXCO Board Member

Purpose: The purpose of this meeting is to provide Community Partners solutions to growing and managing their business (Educate and Inform). A panel of financial subject matter experts will discuss how to track key financial metrics and use financial data to make informed business decisions to achieve financial success and growth. Also, the panelists will outline understanding how to set and achieve financial goals. **Educate | Inform | Connect** (Potential Points: Community Partner Membership Growth, Membership Drive, Membership Meeting)

Suggested Guest Speaker: Mr. David Chapman, Vice President, Business Banking, Truist Bank

Topic: Small Business' Roadmap to Financial Planning and Cash Flow Management

2. EXECUTIVE COMMITTEE MEETINGS (EXCOM)

The executive committee meets from 5:30 p.m. on the 2nd Thursday of each month (12 meetings each year).



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a. The EXCOM provides overall strategic and tactical leadership for the North Texas - Audie Murphy Chapter. The EXCOM is charged with the responsibility to create and administer programs providing chapter membership opportunities to serve soldiers and families in the North Texas - Audie Murphy AOR.

b. The following positions comprise the Executive Committee Officers (EXCO):

- President: Serves a 2-year term
- 1st VP (President Elect): Elected by general membership NLT 1-year prior to assuming role of Chapter President. Coordinates major chapter fund raising efforts
- Secretary: Serves a 2-year term
- Treasurer: Serves a 2-year term
- Past President (Executive Director): Serves for period immediately after presidency. That person can officially represent the chapter president at National AUSA events.
- Vice President of Community Partners
- Vice President of Membership and Member Engagement
- Vice President of Public Relations/Communications/Marketing
- Vice President of Leadership Development
- Vice President of Reserve and National Guard Outreach
- Vice President of Legislative Support/AUSA Resolutions
- Vice President USAREC Support (AUSA rep to CASA Grassroots Program)

c. EXCOM responsibilities include but are not limited to:

- Establish the Chapter's vision
- Set the Chapter's goals and objectives
- Manage the Chapter's Financials
- Establish ADHOC Committee positions to oversee key chapter programs
- Maximize attendance at meetings
- Write and publish the newsletters quarterly(Engagement VP)
- Maintain the Chapter's website
- Represent AUSA at key community events enabling advocacy for the Army, our Soldiers, and their families

3. CHAPTER SUCCESSION PLAN

The chapter will elect a 1st VP during the first year of current President's tenure and send that 1st VP to next available New President's training course to assure he/she is fully prepared to take over duties and responsibilities of President.



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4. ADHOC COMMITTEE MEETINGS

- a. There are NO regularly scheduled ADHOC Committee meetings. Members serve on a ADHOC project and advise the membership of opportunities to participate in activities that serve to “provide a voice for the Army and a support for the Soldier.”
- b. Current ADHOC Committees include:
 - AUSA North Texas - Audie Murphy Wounded Warrior Golf Classic Planning Committee
 - Veterans Day Parade Liaison
 - Employer Support to Guard and Reserve (ESGR)
 - Liaison with other veteran organizations in the AUSA North Texas - Audie Murphy Chapter’s area
 - AUSA Resolution Liaison
 - National Defense Briefing Series, Inc.
 - AUSA Legislation Liaison - voting member

5. MEMBERSHIP ACTIVITIES

Membership activities are the responsibility of the Vice President of Membership and Member Engagement. In the absence of a Vice President of Membership, the Chapter President will assume the role until the position is filled.

Scheduled membership drives are in **Fall 2023** and **Spring 2024** (refer to Appendix 4), as well as a continuous recruitment effort to meet the chapter’s and AUSA’s goals.

6. CHAPTER “LINES OF OPERATION”

- a. Wounded Warrior Support (**Educate and Inform**)
 - **Raise awareness and funds for Wounded Warrior Programs:** The chapter will identify local programs that provide verifiable support to Wounded Warriors and their caregivers as recipients of funds raised by the Chapter during the operating years.
 - No more than 25% of the funds generated by Chapter’s activities will be applied to the Wounded Warrior Support Programs.
- b. U.S. Army Recruiting Command (**Inform and Educate**)
 - The Chapter will include the Our Community Salutes DFW (OCS) effort with a monetary contribution during FY23-24. OCS provides a two-fold opportunity: (1) Membership Drive (2) Volunteer Participation
- c. Education Programs (**Educate**)
 - *Passing the Torch Leadership Program:* Provide interactive, immersive, and memorable leader development opportunities that enable chapter members to coach teach and mentor emerging Army leaders.



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- The program focuses primarily on assisting university ROTC programs train the next generation of Army leaders.
 - During the FY23-24 Operating Year, the Chapter will focus on expanding that effort to support JROTC Programs within the Chapter footprint.
 - In cooperation with AUSA IV Region Leadership Team, the Chapter will focus on developing a relationship with the US Army Cadet Command to identify opportunities that expand the Passing the Torch Program across AUSA IV Region.
 - The Coaching, Teaching, and Mentoring efforts will leverage the curriculum (and associated training and support materials) that have been developed by Chapter members over the last 10 years.
 - Key Program Elements include:
 - Leadership Development Sessions with SROTC and JROTC cadets ICW University PMS's and ISD JROTC Directors. These sessions will draw from the content developed in the Passing the Torch program and meet the curriculum needs of the supported ROTC program. Classroom visit expenses are estimated at \$500.
 - The Chapter will continue to advance the relationship between ROTC leaders in the Chapter Area of Responsibility by attending (and speaking at) awards ceremonies and commissioning ceremonies as requested. The Chapter will continue to provide the AUSA North Texas - Audie Murphy Chapter Leadership Award to the top SROTC cadet each semester (as nominated by the PMS) at supported universities (Baylor University, University of North Texas, Texas Tech, and Texas Christian University). The estimated expense is \$500.
 - Battlefield Leadership Experiences (BLE). The BLE may occur during Fall 2022 semester and Spring 2024, using the Vicksburg Military National Battlefield in Mississippi or the San Jacinto Battlefield in Houston, Texas. (Contingent on securing funding/Sponsorships from 3rd parties).
- d. Army Scholarship Foundation (**Inform and Connect**)
- To build awareness of the educational opportunities available for future leaders, the Chapter will continue to support a scholarship award, Army Scholarship Foundation. AUSA North Texas - Audie Murphy Chapter will provide volunteers to participate in the grading of scholarship applications.
 - At the annual Army Scholarship Foundation Award Luncheon in November, the Chapter will sponsor 5 tables.



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e. Other Activities

- The Chapter will support the Army Scholarship Foundation by committing no more than 25% of all funds raised by Chapter activities towards the effort. **(Educate)**
- The Chapter will continue to support the Dallas Veterans Day Parade in two (2) ways. First, a Chapter member will participate as a judge chairman on the Parade Judging Committee and second, the Chapter will provide a donation to the Parade Foundation. **(Connect)**
- The Chapter will conduct at least one Community Partner Appreciation event during the operating year. **(Connect)**
- Educate the Texas State Senators and Representatives. Connect with the local Congressmen and Congresswomen on AUSA objectives during AUSA National Meeting and AUSA IV Region events. **(Educate | Connect)**
- Strengthen relationships with military service organizations in the metroplex to present a unified effort on key issues. **(Educate | Inform | Connect)**

h. Key Relationships (Educate | Inform | Connect)

Strategic relationships critical to the chapter's mission and goals include:

- Office of Chief of Army Reserve
- TAG Texas National Guard
- US Army Corps of Engineers - Dallas Corps of Engineers
- Texas' Employer Support of the Guard and Reserve (ESGR) Committee
- Major Commands USAR and Texas Army National Guard
- Civilian Aide to Secretary of the Army (CASA) and Army Reserve Ambassadors (ARA)
- USAREC Dallas Battalion Commander (along with the Battalion's subordinate companies)
- Army National Guard and US Army Reserve (USAR) Recruiting leadership
- National and state legislative leaders
- Regional and Local Elks Lodges

i. Fundraising

- North Texas Giving Day (September 2023). Communities Foundation of Texas' North Texas Giving Day is an 18-hour online giving event designed to empower every person to give back to their community by supporting local nonprofits and causes they care about in one easy-to-use platform.
- Annual AUSA North Texas - Audie Murphy Chapter Wounded Warrior Golf Classic (October 2023). Plan and execute the Annual Golf Classic that supports three (3) North Texas - Audie Murphy Wounded Warrior Programs.



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j. Membership Drives

- Once a quarter, a membership drive combined with a member's meeting will be held.
- A guest speaker at each meeting will be a key representative or leader from the list outlined in Item 6. For example, at the January 20th Membership Drive and Members Meeting, Congressman Self will discuss the challenges of national security. The goal is to educate the community on the military as well as influence prospective members on the value an AUSA membership to subsequently join AUSA.
- Funds for hosting the membership drives and members meetings will be come from the Chapter's Annual Golf Classic and North Texas Giving Day fundraisers.

7. SPECIAL PROJECTS (ADDITIONAL FOCUS AREAS)

a. Dallas Veterans Day Parade (DVDP) - Committee Chairperson: Colonel James P. Hogan, USA, Retired (Executive Director, AUSA IV Region and Vice President, Leadership Development, NTAM). The chapter will contribute to the DVDP and provide an individual to serve on the Chief Judging Committee.. The chapter will also provide on-going support to the DVDP Planning Committee. **(Connect)**

b. Army Birthday Celebration - Committee Chairperson: Lieutenant Colonel Joel Batalisky, USA, Retired (First Vice President). The chapter will plan and conduct an Army Birthday Celebration seeking to include members and young professionals. **(Educate | Inform | Connect)**

c. Dallas and Ft. Worth ISD JROTC support - Committee Chairperson: Colonel Rich Kaniss, USA, Retired (Executive Director and Past President). The chapter will participate in events hosted by the Dallas ISD JROTC, Ft Worth ISD JROTC, and 15+ ISD JROTC departments in metroplex and surrounding cities. The partnership with the organizations allow the chapter to receive the benefit of extending our Leadership Programs into the local High School JROTC departments. **(Educate | Inform | Connect)**

d. Golf Classic - Committee Chairperson: Colonel Rich Kaniss, USA, Retired (Executive Director and Past President). The chapter will plan and execute the Annual AUSA North Texas – Audie Murphy Chapter Wounded Warrior Golf Classic to support three (3) North Texas - Audie Murphy Wounded Warrior programs. **(Educate | Inform | Connect)**



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e. **AUSA Day** – Committee Chairperson: Lieutenant Colonel Joel Batalsky, USA, Retired (First Vice President). The chapter will plan and execute an activity celebrating AUSA Day utilizing resources from the Ask 2.0 Toolkit. (**Educate | Inform | Connect**)

5. BUDGET (Appendix 2)

Patti McCoy

Patti McCoy
Chapter President



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Appendix 1 - Programs Listed by Quarter

**Chapter Annual Plan
1 July 2023 to 30 June 2024**

First Quarter (Jul 2023-Sept 2023)

- EXCO Monthly Meetings (3)
- AUSA Resolution Development
- Annual Financial Report to AUSA National
- Annual Audit of Chapter Financial Accounts
- Annual Chapter Plan
- North Texas Giving Day
- Membership Drive
- General Membership Meeting (Sept 13, 2023)

Second Quarter (Oct 2023-Dec 2023)

- EXCO Monthly Meetings (3)
- Veterans Day Ceremony (Parade Support)
- AUSA Annual Meeting - Attendance at AUSA Annual Meeting
- AUSA North Texas– Audie Murphy Golf Classic
- SROTC Awards presentations as needed
- Membership Drive
- General Membership Meeting (Community Partner Recognition – Dec 7, 2023)

Third Quarter (Jan 2024 - Mar 2024)

- EXCO Monthly Meetings (3)
- Presentation of Awards to JROTC Recipients
- Battlefield Leadership Experience (Vicksburg) ISO TCU, Baylor, UT Arlington and UNT ROTC – TBD
- Membership Drive
- General Membership Meeting (Jan 20, 2024)

Fourth Quarter (Apr 2024 - Jun 2024)

- EXCO Monthly Meetings (3)
- Our Community Salutes DFW (Dallas and Fort Worth Recognition Events)
- Army Birthday Celebration
- AUSA Day
- Army Scholarship Foundation Grading
- Presentation of Awards to SROTC and JROTC Recipients
- Membership Drive
- General Membership Meeting (Apr 4, 2024)



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Appendix 2 – Annual Budget Plan

**Chapter Annual Plan
1 July 2023 to 30 June 2024**

Income:

Corporate Dues	2450
Individual Dues	2363
Lifetime Members	600
Sustaining Members	200
Presidents Club	850
<u>Total Dues</u>	<u>6,463</u>
Wounded Warrior Events	50,000

TOTAL INCOME **56,463**

Primary Expenses:

AUSA:	
Chapter EXCO Meetings (12)	600
General Member Meetings (4)	1000
Operating Expenses	1000
Regional Meeting Support	1000
National Meeting	2500
Awards/Honorarium	1000
Veteran Day Parade	500
Army Birthday	250
Graphic and Media support	500
Web Support	<u>2000</u>
TOTAL	9,850

Other Program Expenses:

Leadership Programs	500 (Gladius)
Golf Expense	25000
Legislation	750
Non-Profit Support	<u>17000</u>

TOTAL OTHER EXP **43,250**

TOTAL EXPENSES **53,100**

NET Operating Income **3,363**



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Appendix 3 – Major Fundraising Events Plan

Chapter Annual Plan 1 July 2023 to 30 June 2024

AUSA North Texas - Audie Murphy is committed to raising awareness and funds in support of Wounded Warriors, Education, and Veteran Support Programs in North Texas.

Chapter Goal: \$50,000 in 2023-2024

The major Chapter fundraising events include:

1. North Texas Giving Day

Objective: \$1,000

Date: September 2023, online

All expenses associated with the event will be covered by donations. Administrative tools and promotions will be provided by the developers of North Texas Giving Day. Members and individuals in the community will be asked to participate.

2. AUSA North Texas - Audie Murphy Wounded Warrior Golf Classic:

Objective: \$50,000. \$40,000 Net

Scheduled October 2, 2023, at Firewheel Golf Course in Garland TX

All expenses associated with the event will be covered by donations, sponsorships and players entry fees. No chapter operating expenses will be directed toward the event. All proceeds will be directed toward three (3) designated Wounded Warrior and Education programs. The AUSA North Texas - Audie Murphy Executive Director/Past President (Colonel Rich Kaniss, USA, Ret) oversees the program.



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Appendix 4 - Awards Plan

Chapter Annual Plan 1 July 2023 to 30 June 2024

Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting	EXCO Meeting
Annual Audit of Chapter Financial Accounts	ESGR overview to companies	National Defense Briefing Series	Annual AUSA North-Texas Audie Murphy Wounded Warrior Golf Classic	Judge at Veterans Day Parade Ceremony	General Membership Meeting (Community Partner Recognition and Holiday Party)	General Membership Meeting (Defender of Freedom Award)	ESGR overview to companies	Battlefield Leadership Experience – Tentative (Education Program)	Presentation of Awards to SROTC and JROTC Recipients	National Defense Briefing Series	AUSA Day
Annual Financial Report to National	Volunteer Golf Planning Meeting	North Texas Giving Day	AUSA Annual Meeting and AUSA IV Region Meeting	Army Black Knights vs Air Force Falcons Game	SROTC Award Presentations as needed	ESGR overview to companies	Leadership Development Sessions with SROTC and JROTC cadets	Presentation of Awards to JROTC Recipients	Chapter Elections	Exhibit and Membership Drive at Our Community Salutes DFW (OCS)	Army Birthday Celebration: Army Scholarship Foundation's Scholarship Grading
Recruiting Battalion Change of Command Ceremony		General Membership Meeting (Military History Book Club)	Meet with Texas Congressmen and Congresswomen at AUSA IV Region meeting	Army Scholarship Foundation Luncheon	Leadership Development Sessions with SROTC and JROTC cadets	Exhibit and Membership Drive at Our Community Salutes DFW (OCS)			General Membership Meeting (Military History Book Club)	Presentation of Awards to SROTC and JROTC Recipients	Chapter Leader's Training for New President
Volunteer Golf Planning Meeting		Volunteer Golf Planning Meeting	ESGR overview to companies	ESGR overview to companies	Wreaths at DFW National Cemetery				AUSA IV Region Meeting	Army Museum Program	Annual Chapter Plan to National

Potential Program Awards to Receive

Army Birthday Celebration
 Support of ROTC
 Community Partner Support
 RC/ESGR Support
 Professional Development
 Retire Soldier/Veterans Support
 Professional Development
 Support to Recruiting Command
 Army History
 AUSA Day
 Member Communication
 Young Professionals
 Army Museum Support
 Advocacy (formerly Institute of Land Warfare, Taking the Hill)

Membership Increase

Increase in Community Partner Membership
 Increase in Civilian Membership