CHARLOTTE-METROLINA CHAPTER NEWS

February 2014

The Military Officers Association of America

PRESIDENT'S MESSAGE

The winter has arrived here in Charlotte as we prepare for another cold blast from Canada. I am sure that we wish the Canadians were not so generous. HAPPY VALENTINE'S DAY! Hope all the men have made their plans. Last month I placed an error in this message when I said the new budget bill would cap the COLA for veteran retirement pay for those 62 years of age and under at one percent. The correct message: "the COLA is reduced by one percent" for this age group. However, the whole retirement compensation is in a state of confusion and the National MOAA and local chapters are working very hard to make sure that veterans and their families are treated fairly.

As we work our way deeper into 2014 we have a number of projects underway. Facebook is being done by Greg Ainslie and he needs pictures right now. The website is being created by Gary Aljets as approved in the December 8, 2013 meeting followed by the e-newsletter with Ron Wilsbach. The scholarship committee chaired by Gloria Scienski is working on the procedures and bylaws under which it will operate. Fund raisers for these projects are ongoing. We are still in need of a secretary. Ron Morgan is currently filling in, but he has many other responsibilities in his position as 1st VP. We need someone to step forward and be secretary.

Membership is a big focus for our membership chairperson Carol Aljets. With over 17,000 National MOAA members in North Carolina and only 1800 members belonging to a MOAA local chapter, we all have much work to do. For our next chapter meeting bring a guest. The national and state legislative scene is changing and this throws more actions and responsibility on the local chapters whose members are the ones that respond to the "call to action" by National MOAA and the NC Council of Chapters. At the February 16, 2014 chapter meeting Mr. Kurt Geske will present a program on the military in Charlotte during WW1. See all of you there.

Harley Ellinger COL USA (RET)

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NEXT MEETING

Sunday, Feb. 16, 2014

Red Rocks Cafe

4223 Providence Rd

Social Time 1500

Meeting with Meal 1530

PROGRAMS – RON MORGAN—1st Vice President

February 16, 2014, 3:00 PM—Kurt Geske, Historian, Writer, Attorney (US Army JAG Corps and civilian practice), and Director, Gaston County Dept. of Veteran Services – Kurt, a chapter member, will provide a presentation of Camp Greene and Charlotte during WW I. He is part of a state-wide university project, working with the History Department faculty at UNCC, to commemorate the 100th anniversary of WW I and its impact on North Carolina.

March 16, 2014, 3:00 PM – SPECIAL PROGRAM FROM MOAA NATIONAL – Colonel Richard Erickson, USAF (Ret), MOAA National Board of Directors – Colonel Erickson and his wife, Joan, will join us from Atlanta. He will provide an overview of MOAA national initiatives and, in particular, challenges to our veteran/retiree benefits as the Federal Government seeks to deal with the national debt.

We would like to maximize attendance for this March meeting. The national MOAA office is sending out invitations to all national MOAA members living in the area that are not members of our chapter. We plan to send out another email asking for reservations from all chapter members and guests that plan to attend. However, beginning now for this March 16th meeting, you can either e-mail your reservation to: rbmorgan943@aol.com or call (704) 708-8866.

Future Meeting Dates: April 6th (two weeks earlier to avoid Palm Sunday and Easter) and **May 18, 2014**

MEMBERSHIP – CAROL ALJETS—2nd Vice President

2014 CHAPTER DUES ARE DUE

If you have not already done so, **please renew your chapter membership for 2014** by completing the enclosed form (last page of the newsletter) and sending it with a check to the P.O. Box. Shortly, an email or letter will be sent out to all still on the chapter roster who failed to pay annual dues for 2013 and are more than a year in arrears. Simply paying dues for 2014 ($ 25.00 for regular members and $ 10.00 for surviving spouses/auxiliary members) will fully reinstate a member.

Our efforts to get in touch with individuals to let them know about our chapter is definitely bearing fruit as shown by the fact that we had several new faces at our January meeting and a couple of new members. I do not have the definite numbers but plan on getting them and putting them in the next newsletter so we can all pat ourselves on the back. I appreciate everyone's efforts in sending out e-mails, calling and by being friendly to the new individuals as they come to visit. Our visit from National MOAA in March usually aids in our recruiting effort in that they send out invitations to all members in the area and please remember this if you see someone you do not know at the March meeting (or any other meeting). Sometimes they may be a member who you do not remember because they have not been there when you have but most of us can claim senior moments. I have currently two individuals who have asked for information on joining the chapter and should be joining in the next couple of months.

Also MOAA has a basic membership for young officers which is free and if you know someone who is not sure about getting involved this is a good way for them to at least find out what National is doing and all they have to do is fill out a postcard and sent it to National. If you need more information on this let me know and I will get the cards and info to you as soon as possible.

LEGISLATIVE -- GLORIA SCIENSKI – 3rd Vice President

We need your help. You, our MOAA Chapter Members, make a strong impact when you add your voice to MOAA National initiatives. The best way to be heard is to call the congressional switchboard at 202-224-3121. When calling this number you will reach a person that will forward you to the office of your Senator or Representative. Most effective are telephone calls made on Monday and Tuesday due to the voting schedule.

The Chapter is developing an early response system to ensure members know of urgent legislative issues. The communications will be made by e-mails and phone calls. We will design the communication process and recruit a few volunteers to help when there is a need to notify our membership. Please contact me at g.scienski@gmail.com to volunteer.

Congress took a small step recently towards repealing recently passed COLA cuts for military retirees. Both the House and Senate passed the Consolidated Appropriations **Act** (H. R. 3547). The package to fund the federal government for the remainder of the fiscal year exempts medical retirees and survivors from the COLA cuts.

A comprehensive fix could be on the way. The new bill incorporates repeal of the unfair 1 percentage point COLA reduction for working age military retirees and currently serving members established in the Balanced Budget Act**.** It also addresses a number of major MOAA priorities for veterans.

MOAA's Director of Government Relations, Col. Mike Hayden, USAF (Ret) said, "the bottom line is until you can adjust the conditions of service for those in uniform to be more civilian-like, stop trying to compare the two. What is most disturbing is equating military service to the private sector. We've seen the service and sacrifice our men and women in uniform and their families have had to endure over the past 12 years of war, and they are far from civilian-like."

The men and women in uniform cannot say "no" when presented with orders they don't like. They, unlike civilians, are subject to the Uniform Code of Military Justice. In order to earn the retirement benefit, service members must make it through an up-or-out personnel system or potentially face being separated or discharged.

MOAA believes Congress must reach a bipartisan solution to fully and immediately repeal COLA-cutting provision, and address critical veterans' needs.

Remember, your voice counts.

CHAPTER SECRETARY – VACANT

Minutes of the Charlotte-Metrolina Chapter (NC-04)
Of the Military Officers Association of America
January 19, 2014

President Ellinger called the business meeting to order at 3:30. Invocation and Pledge of Allegiance followed. A brief introduction of all members and guests started the meeting.

Bill McKenna, a past President, led the installation of Chapter Officers and Directors for 2014. Installed were:

- President: Harley Ellinger
- 1st VP: Ron Morgan
- 2nd VP: Carol Aljets
- 3rd VP: Gloria Scienski
- Secretary: Open
- Treasurer: Ron Wilsbach
- Director: Larry Stawicki
- Director: Martha Ellinger

Minutes of the December 8, 2013 meeting were approved as distributed in the newsletter.

Treasurer Report (Ron Wilsbach): $ 4,097.06 including $ 1,312.15 in the Scholarship Fund. The possibility of paying chapter dues on line through MOAA National was discussed.

Officer Reports:

1st VP and Acting Secretary (Ron Morgan): Announced Feb 16 meeting speaker as Kurt Geske, discussing WWI in Charlotte's Camp Greene and March 16 as Colonel Richard Erickson, MOAA National Board of Directors. For the March meeting, we will need reservations as the national office will send invitations to all area MOAA members that are not chapter members. He also announced that chapter dues for 2014 are past due and requested all to send in their checks as soon as possible. A letter will be sent out shortly to all those who have not paid dues for the past 2-3 years. Any non-payers, by mid-March, will be dropped from the chapter roster.

2nd VP (Carol Aljets): Recognized the four (4) new faces that attended their first meeting due to new member recruitment efforts utilizing the national-provided listing with email addresses. She urged all to join the chapter and discussed a 10% new membership growth goal for 2014.

3rd VP (Gloria Scienski): Gloria deferred to Harley Ellinger who is also the Legislative Affairs VP for the NC Council of Chapters. He discussed congressional issues, as reported in the NC Council meeting the day before, and provided all with the congressional switchboard number.

Newsletter (Carol Morgan): Newsletter input is due by 1/24/2014 for publication around 1/31/2014. Carol requested that member bios be submitted for future inclusion in the newsletter.

Old Business: The California Pizza Kitchen Fund Raiser on 10/17/2014 netted the chapter a total of $ 172.25 for the Scholarship Fund. Another CPK fund raiser will be scheduled for April 2014. Larry Stawicki reported that there are still 56 Auto Bell coupons to be distributed/sold. Gloria Scienski reported that work on the Scholarship Fund continues and we want to identify a pro bono lawyer to provide input on any required structure for this 501(c) 3 effort.

New Business: An effort is on-going to advertise the chapter in local events/meetings and to hand out business cards. Our membership growth effort will also include announcing chapter meetings and programs in area publications (regional/area papers, etc.) upcoming events columns, etc. The chapter will explore sources and costs in providing all members with plastic name tags.

Announcements: Gary Aljets announced the "Star Spangled Girls" program, sponsored by the Matthews American Legion Post, to be presented on March 15 and 16.

Program: Blake Bourne, Director of Community Initiatives for Charlotte Bridge Home, presented a program about the situation in the Charlotte area for veterans and their programs to address the issues of finding quality jobs, homes, training, etc. for veterans and their families. He discussed how our chapter and our individual members can assist these efforts.

The meeting and presentation adjourned around 5:20 PM.

Respectfully submitted,

Ron Morgan, Acting Secretary

"Bailey" Case – History & Status

Government retirees achieved a significant victory in 1998, referred to as the "Bailey Settlement" with the State of North Carolina. This Settlement assures most current federal, state and local government retirees of exclusion from payment of State Income Tax on their government retirement benefits for the rest of their lives. It applies, however, only to those who had five or more years of creditable service toward retirement as of August 12, 1989. This means that any government retiree who entered service after August 12, 1984 and retired with twenty or more years of service does not qualify for this tax exclusion. Many military retirees now pay State Income Tax while most of their contemporaries are exempt.

The issue today is: Do we, who are currently retired and not paying State Income Tax, have an obligation to our fellow government employees (state, military & civil service) to work toward extending the exclusion to this younger group? There are those who would say, using an old Navy term, "Pull up the ladder – I'm aboard." But is this our attitude? Most of us are aware that the "Hatch Act" precludes active federal government employees, including military, from political activism - thus they cannot act on their own behalf. But as retirees we can act for them.

The 4th Branch, at a meeting several years ago, voted unanimously to take on the task of convincing our State General Assembly to enact legislation correcting this inequity. This group, primarily responsible for the Bailey Settlement, is made up of all government organizations within North Carolina (state and federal). This effort remains ongoing.

Those of us leading this struggle remain confident that eventually our legislature will vote to extend the exclusions. This confidence is supported by the results of an extensive study commissioned by the 4th Branch showing that the State gains $2.50 for each dollar of tax lost by extending this exclusion.

House and Senate bills have been submitted for the last several years but have not been approved. The 2013 House Bill 96 was submitted with a recommendation to phase in the full State Income Tax exclusion over a 9 year period to provide for a lesser impact on income tax receipts in any one year. This bill also restored the reciprocal agreements with other states that grant NC retirees exclusion.

We know we are competing for limited funds and fighting shortages. Our fervent hope is that this issue will be included when the General Assembly considers further revisions to the State tax structure.

This year, 2014, has key significance regarding this extension. Large numbers of State employees, especially teachers, will reach 30 year retirement eligibility. Those who entered government service after August 12, 1984 will not be excluded from paying State Income Tax. This will certainly increase the level of interest to approve the extension.

From a military perspective, unless we are successful in this extension, many of our brave military fighting men and woman now returning from combat assignments will be taxed by this State upon retirement or choose to retire in another state. This is a disgrace for a State that claims to be "Military Friendly."

Point Paper

SUBJECT: Bailey/Patton

BACKGROUND: a. In 1989 North Carolina was sued for illegally taxing government pensions; in 1998 NC Supreme Court ruled (5-20) that State, in fact, illegally taxed government pensions and ordered return w/interest. b. By 1989, through a negotiated settlement, the NC legislature agreed to provide $799 million to those meeting the five year requirement.

CURRENT STATUS: a. Military retirees with 20 years service as of 12 August 1984 are covered for life. Those retiring after 12 August 2004 are NOT covered under current law. b. Other federal, state & local government retirees, needing 30 years to be retirement eligible, are NOT covered under current law; c. Two classes of retirees created by NC legislature under Bailey/Patton: those covered by the law, and those not covered by the law.

ISSUE: Eliminate the 5-year "vesting" requirement for all military and government employees, thereby providing an equitable tax relief for all.

ORGANIZATIONS SEEKING TAX EQUITY:

a. **4th Branch:** represents all military and federal/state/local government retirees; hires outside lobbyist to press for passage of Bailey/Patton tax equity. Co-chairs representing state/local government employees, and military/federal government employees. Active organization that meets quarterly. Conducted successful study which shows NC gains $2.50 for every tax dollar lost by eliminating "vesting" requirement.

b. **Federal Retiree Task Force:** initial organization to fight for passage of Bailey/Patton. As name implies was eminently successful in raising funds to win the fight at NC Supreme Court

NEXT STEPS:

a. Brief Speaker of the House and Lt. Governor on provisions of current bill which increments tax exclusion over 5 year period;
b. Brief respective House/Senate Committee Chairs as stated above
c. Brief Governor McCrory before "short" legislative session begins (date?)

ANNOUNCEMENTS & UPCOMING EVENTS:

February 16, 2014 – MOAA Chapter Meeting, Red Rocks Café, 3:00 pm
March 15-16, 2014 – Star Spangled Girls, Matthews Fullwood Theatre
March 16, 2014 – MOAA Chapter Meeting, Red Rocks Café, 3:00 pm
April 6, 2014 –MOAA Chapter Meeting, Red Rocks Café, 3:00 pm
May 18, 2014 –MOAA Chapter Meeting, Red Rocks Café, 3:00 pm

FEATURED MEMBER: CDR Carol S. Aljets, USNR (Retired)

I was born in Albuquerque, New Mexico, where my father was stationed with the Army Air Corps. After a tour in England my father left the military and we moved to Memphis, TN, where I grew up and lived until I was twenty-two. I attended Memphis State University majoring in both history and sociology and graduated Cum Laude in August 1970. I was sworn into the US Navy in July 1970 and had to wait until October to attend my WOS class at Newport, RI.

I was commissioned an Ensign on December 18, 1970 and became one of about 600 female line officers in the Navy at that time. After two weeks away for Christmas we came back for two more months of training before I was assigned to Commander Eastern Sea Frontier at 90 Church Street in lower Manhattan. It was there I met my future husband Gary Aljets.

Our major mission was training reservists in Naval Control of Shipping. We were also support staff for the senior military attaché to the United Nations. In this capacity I attended numerous parties for the crew of foreign ships, UN functions and any other function that the Vice Admiral's staff believed needed for public and international relations. I also worked as the Top Secret Control Officer, assistant RPS officer, Air Operations and any other duties performed by a junior officer at the command.

After two years I left active reserve duty and joined the same Reserve unit my husband was a member of in Brooklyn, NY. We drilled there until moving to Memphis so I could attend graduate school in sociology. We were lucky to find pay billets at the local reserve center and I continued my Reserve career in different positions, usually administrative. During this time the Navy began to change the regulations on pregnancy and I had two children. After getting my master degree, I was recalled to active duty for six months at NAS Millington to study and help with the new classroom methods of using the computer for teaching the Aviation Electronics students at an individual pace. When that assignment ended I went back to school to get an Industrial Engineering degree graduating Summa Cum Laude.

We then moved to the Los Angeles area and I ended back into Naval Control of Shipping which I enjoyed boarding merchant ships and getting to know more about the operations. After almost three years in Los Angeles, we left for Connecticut and had a new baby to go with us. I was lucky to find a pay billet in Naval Control of Shipping and with my experience was moved into the position of Training Officer and enjoyed two weeks active duty outside London, England. My only overseas duty while in the Navy. As happens when you are promoted to Commander, there were very few pay billets available in our area. With three small children and a full time job as a Proposal Engineer at Combustion Engineering, I chose to join a non-pay unit and became the Commanding Officer of the Sea Cadet Unit.
I retired on 1 January 1994 with a formal ceremony on the stern of the USS Nautilus. Shortly after that we moved to the Charlotte area and I discovered TROA (now MOAA) and joined and have been active ever since. Serving in each VP position, President for four years and am now the Second VP working hard on recruiting and retention.

I am also involved with the USO, American Legion, Mecklenburg County Veterans Service Council, and a LinkedIn group of veterans that meet monthly for networking and social contacts.

NC-04 CHARLOTTE-METROLINA CHAPTER
Of the Military Officers Association of America
ENROLLMENT/RENEWAL FORM

New Member? _____ Renewal? _____

First Name _____ Middle Initial ____ Last Name _____

Rank _____ Branch _____ Spouse's Name _____

Address: _____
Street

_____
City State Zip code

E-Mail Address _____ Phone No. _____

I would like to receive my newsletter by: _____ US mail _____ E-mail

National MOAA Member? Yes ___ No ___
Membership No. _____
(Found above your first name on magazine mailing label)

*Enclosed is my check for $25.00
$10.00 for Surviving Spouses
Mail to: Charlotte-Metrolina Chapter, MOAA
P.O. Box 31394
Charlotte, NC 28231-1394

Scholarship Donation: _____ Receipt: Yes ___ No ___

Membership Requirements: Commissioned and Warrant Officers of the seven uniformed services (Army, Navy, Air Force, Marine Corps, Coast Guard, National Oceanic and Atmospheric Administration, and U.S. Public Health Service) and the reserve and other components of these services may become regular members. Widows and widowers of any deceased individual, who would, if living, are eligible for membership as auxiliary members. Regular members must hold and maintain membership in both the national organization as well as the local chapter. Auxiliary members are encouraged but not required to hold both memberships.