



## AFA State Annual Financial Plan (AFP) (Updated: Dec, 2023)

### Introduction:

The Annual Financial Plan is a way for you to project and prepare for the activities that you wish to accomplish over the coming calendar year. State Organizations are required to complete a Financial Plan and Annual Activity Plan, submit Semi-Annual Activity, and Financial Reports and update their Officer Rosters each year to remain in good standing and be eligible for any available support funding. Your AFP (approved by the Region President) is **due to Field Services by 31 December**, so let's get started.

### Preparation:

- 1) Before you even find and open up a new state AFP, you should look to pull in some information.
  - a) Pull up, or print a copy of your previous Annual Financial Plan from you organization's field Leaders Portal. If you need assistance getting to it, the good folks at [field@afa.org](mailto:field@afa.org) can help.
  - b) Bring your Executive Committee together to discuss and develop the proposed Annual Activity Plan (AAP), to highlight obvious expenses (e.g., funding scholarships, travel, or a luncheon) of events for the coming year.

### Note:

Unlike in the Activity Plan, you should not report the same money in multiple areas (e.g., if you provided a \$1,000 scholarship for an Airman's dependent to attend a STEM camp, don't show the \$1,000 as both an Education and Support expense. Instead you should either divide it up between the two areas, or list the entire amount in either area.



## Mission Area Descriptions

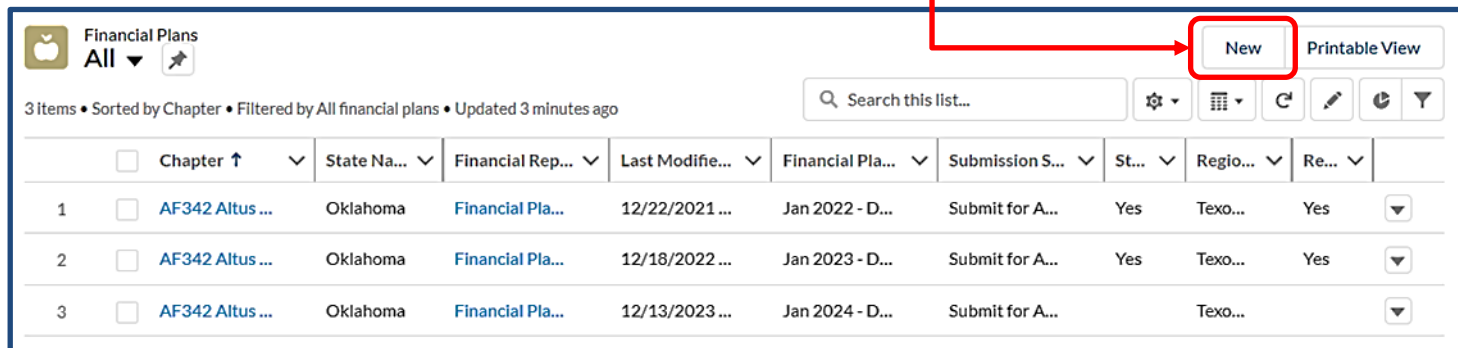
- d) The plans (and reports) are organized along four overarching mission areas: Education, Advocacy, Support, and Communication. Here is a brief summary of the types of activities envisioned in the four areas (Note: these are illustrative and not limiting):
- i) **Education:** This is envisioned to be more about the education of our youth; encouraging them to pursue STEM studies, and assisting educators in the same endeavor; promoting/participating/supporting CyberPatriot and StellarXplorers; work with Civil Air Patrol (CAP), AFJROTC, AFROTC units (to include Arnold Air Society and Silver Wings).
  - ii) **Advocacy:** Obviously the first thing that comes to mind is associated with working with your legislators. This is important but the “advocate” mission is also much more. It includes state and local leaders and even the community at large. Our goal is to promote a community understanding of, and support for, a strong air, space and cyber defense. Conducting forums and presentations help in promoting that understanding.
  - iii) **Support:** Our Airmen & Guardians (current and former Active, Guard, Reserve, and AF/SF Civilians) and their families are making (or have made) sacrifices. We owe it to them to provide what support we can. Recognition and award programs, Wounded Airman, and family support are examples of activities that could be captured in this area.
  - iv) **Communication:** We must communicate with our members to inform them of state organization activities, to invite or encourage them to participate, and pass on other important AFA information. Newsletters, social media, and social events are activities that fit in this area. We must also reach out to prospective members.

2) With an idea of what you want to accomplish over the next year, you are now ready to head to your Field Leaders Portal and start your new Chapter Annual Financial Plan.

a) On your Field Leaders Portal, select **Financial Plans**



b) And on the resultant page, select **New**.



## New Financial Plan

Review the errors on this page.

These required fields must be completed: Chapter

### Submission Section

Financial Report Name

Name of Treasurer

Cash in Bank & on Hand at START

INAFA Receipts from AFA National

Income from Community Partners

\* Chapter

Financial Plan Period

Submission Status

--None--

Draft

Search Members / Prospects

Cancel

Save & New

Save

c) **IMPORTANT:** Once you have the plan open, take note that it is already in **Draft status.** Don't change this until you are ready to submit your plan for approval...we'll cover that later.

d) You'll also notice that you cannot initially save the new Financial Plan until you have filled in the **"Chapter"** block (click on the box, and select your state organization when it pops up).

4

By the way, every time you decide to **save** your document (which should be often) you will pop yourself out of the edit page, back to the actual Plan (below).

**Financial Plan # XXX** Edit Delete Printable View

**Submission Section**

Financial Report Name: Financial Plan #XXX

Financial Plan Period: Jan 2024 - Dec 2024

Name of Treasurer: [ ]

Submission Status: Draft

Cash in Bank & on Hand at START: \$0.00

Record Name: [ ]

INAFA Receipts from AFA National	Total
\$0.00	\$0.00
Income from Community Partners	Total Disbursements
\$0.00	\$0.00
Total Receipts	Cash in Bank & On Hand at END
\$0.00	\$0.00

Chapter: [State of Oklahoma](#)

**New Financial Plan**

**Submission Section**

Financial Report Name: [ ]

Financial Plan Period: --None--

Name of Treasurer: [ ]

Submission Status: Draft

Cash in Bank & on Hand at START: [ ]

Cancel Save & New **Save**

From here there are three ways to get back into the edit mode.

1. Tap the **Edit** button
2. Select any of the **edit pencils** to edit the document directly, or...
3. If you leave the webpage completely, you can return to the Field leader portal, select the **Financial Plans** button and your **saved plan** will now be waiting for you to select and edit.



**Financial Plans** All [ ] [ ]

1 item • Sorted by Chapter • Filtered by All financial plans • Updated a minute ago

	Chapter	State Name	Financial Report Name	Last Modified Date	Financial Plan Period
1	<input type="checkbox"/> State of Oklahoma	Oklahoma	<b>Financial Plan #XXX</b>	11/22/2024 8:46 AM	Jan 2024 - Dec 2024

## Completing the Plan:

- 5) Now you can start filling in the plan.
  - a) Financial Plan Period: Select the appropriate dates from the pull-down menu.
  - b) Name of Treasurer: Enter the name of the person who is preparing this plan.
  - c) Cash in Bank & on Hand at START: Should be what you plan of having available at the end of the current year (2023).
- 6) Income
  - a) Income from AFA National: Input the amount of income you expect to receive during the next year from AFA National in support payments and other incentives (e.g., new members and renewal payments, etc.).
  - b) Income from Community Partners: You can show this as the total amount you expect to receive from your CPs, or go ahead and reflect the net income (subtracting the \$45/Partner required to National); just note if you claim the total income, you'll need to show the \$45/Partner as a debit in the Expenditures section.

### New Financial Plan

#### Submission Section

Financial Report Name

Financial Plan Period

Jan 2024 - Dec 2024

Name of Treasurer

Submission Status

Draft

Cash in Bank & on Hand at START

INAFAs Receipts from AFA National

Income from Community Partners

\* Chapter

Your State Organization Title

## Edit Financial Plan # XXX

### Other Income

IN1 Amount of Other Income #1

\$0.00

Source of Other Income #1 and  
Details

IN2 Amount of Other Income #2

Source of Other Income #2 and  
Details

IN3 Amount of Other Income #3

Source of Other Income #3 and  
Details

IN4 Amount of Other Income #4

Source of Other Income #4 and  
Details

Total of Other Income  
\$0.00

Cancel

Save & New

Save

- c) Other Income: Enter the **amount** of the additional income, and also include its **source**.

- There are a total of four boxes to accommodate “other” income. If you have more than four areas, we recommend that you group similar incomes (e.g. multiple “Grants”, or “Donations” in a single Source box, with the associated total, then break them out in the “Income and Details” boxes.

- “**Total of**” areas will appear after you Save the document the first time and come back to the “Edit” section.

## 5) Expenditures:

- a) **Aerospace Education:** Under this section there is room to cover five areas. Like in the income section, if you plan for more than five expenses, group like items (e.g., scholarships, Arnold Air Society support, etc.).

### Note:

**Don't** load negative numbers in any of the blocks in this plan...the software has it figured out.

### Note:

Remember to save your work from time to time!

### Edit Financial Plan # XXX

#### Expenditures

Aerospace Education Expenditures #1 \$0.00	Aerospace Education Expenditures #1 Deta
Aerospace Education Expenditure #2	Aerospace Education Expenditures #2 Deta
Aerospace Education Expenditure #3	Aerospace Education Expenditures #3 Deta
Aerospace Education Expenditure #4	Aerospace Education Expenditures #4 Deta
Aerospace Education Expenditure #5	Education Expenditure #5 Purpose

Total Education Support Expenditures  
\$0.00

Cancel

Save & New

Save



- b) **Advocacy:** Complete the Advocacy section the same way you did the Education section. Some types of Advocacy Expenses could be a brochure and materials “advocating” for an enhanced aerospace mission. Perhaps a booth to promote the AF or SF and their missions.

### Edit Financial Plan # XXX

#### Advocacy Expenditures

EAd1 Advocacy Expenditure #1	Advocacy Expenditure #1 Purpose
<input type="text" value="\$0.00"/>	<input type="text"/>
EAd2 Advocacy Expenditure #2	Advocacy Expenditure #2 Purpose
<input type="text"/>	<input type="text"/>
EAd3 Advocacy Expenditure #3	Advocacy Expenditure #3 Purpose
<input type="text"/>	<input type="text"/>
EAd4 Advocacy Expenditure #4	Advocacy Expenditure #4 Purpose
<input type="text"/>	<input type="text"/>
Total Advocate Expenditures \$0.00	

CancelSave & NewSave

**NOTE:**

Unlike the Activity Plan, your Financial Plan can't report the same money in multiple areas (e.g., if you plan to provided a \$1,000 scholarship for an Airman's dependent to attend a STEM camp, you can not show \$1,000 as an Education and the same \$1,000 as a Support expense). Instead, you could say that \$500 will go towards Education and \$500 towards Support (or any other appropriate percentage) or list all of the \$1,000 in either Education or Support.

- c) **Support:** Some examples of Support expenditures could be the Wounded Airman Program, programs in support of Airmen or Space Professionals and their families; and support for veterans.

### Edit Financial Plan # XXX

#### Support Expenditures

ES1 Support Mission Expenditure #1	Support Mission Expenditure #1 Purpose
<input type="text"/>	<input type="text"/>
ES2 Support Mission Expenditure #2	Support Mission Expenditure #2 Purpose
<input type="text"/>	<input type="text"/>
ES3 Support Mission Expenditure #3	Support Mission Expenditure #3 Purpose
<input type="text"/>	<input type="text"/>
ES4 Support Mission Expenditure #4	Support Mission Expenditure #4 Purpose
<input type="text"/>	<input type="text"/>
Total Support Mission Expenditures \$0.00	

CancelSave & NewSave

- d) **Other Expenditures:** If you have expenditures planned that fall outside the Educate, Advocate, and Support arenas (communications, for example) here's where you can account for it. Examples could include the cost of newsletters, video conferencing, membership programs, webpage maintenance, and administrative (office) supplies.

**Edit Financial Plan # XXX**

**Other Expenditures**

EO1 Other Expenditure #1 <input type="text"/>	Other Expenditure #1 Purpose <input type="text"/>
EO2 Other Expenditure #2 <input type="text"/>	Other Expenditure #2 Purpose <input type="text"/>
EO3 Other Expenditure #3 <input type="text"/>	Other Expenditure #3 Purpose <input type="text"/>
EO4 Other Expenditure #4 <input type="text"/>	Other Expenditure #4 Purpose <input type="text"/>

**Note:**

Although only four blocks are shown here, there are a total of seven available.

6) Finishing up.

- a) Make sure the “Cash in Bank & On Hand at END” total is what you expected!
  - i. Did it capture all the proposed items?
  - ii. Too many, or too few zeros on an item?

### Edit Financial Plan # XXX

Income from Community Partners	Total Disburements
<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Total Receipts	Cash in Bank & On Hand at END
<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>

- b) The **Approval Section** at the end of the form is reserved for the Region, and National-level approval process.

### Edit Financial Plan # XXX

#### Approval Section

Chapter Comments

State Email

State Name

State Approved

State Comments

Region Name

Region Email

Region Comments

Region Approved

Cancel

Save & New

Save

- e) When your team thinks they're done, select **State - Submit for Approval** from the Submission Status pull-down menu, and then select **SAVE**.
- 7) Once you have your AFP submitted, your Region President will give it a review.

- a) The Region President will either approve it (sending it up to the next level), or send it back down for corrections/clarifications as required. (Request for clarifications/additions should be clearly stated in the Region **"Non-Approval/Need More Info"** block.)

- b) Once approved, the Region President will submit the Plan to "National".
- c) In all cases, emails to official AFA email addresses should be automatically forwarded to advise of any changes to the plan's status (you might shoot a personal note to the applicable president just to be sure).

## State/Region-Level Approval Process For Chapter Plans

8) Here is the procedure to review chapter plans when they come to you:

- From your Field Leaders Portal, Select **Financial Plans**.
- Select the **Financial Plan of the Chapter you want to review.**



Financial Plans

All ▼

1 item • Sorted by Financial Report Period • Filtered by All financial reports • Updated a few seconds ago

Search this list...

Chapter ▼ State Name ▼ Financial Report N... ▼ Financial Report Per... ↑ ▼ Submission Status ▼

	Chapter	State Name	Financial Report N...	Financial Report Per...	Submission Status
1	AF342 Altus Chapter	Oklahoma	Financial Plan #XXX	Jan 2024 - Dec 2024	Draft

- When the plan comes up, give it a thorough review, top to bottom.
- When you're ready to approve the plan, or send it back for one reason or another, select the State (or Region) Approval **Edit Pencil**.

Financial Plan #XXX

Edit Delete Printable View

Details Reports/Plans

Fin Report Period: January - December 2024

Chapter: AF342 Altus Chapter

Submission Status: Submit For Approval

State Approved: No / Need more info

State Non-Approval/Need More Info: Please complete report

- Then, open the **pull-down menu** and select what you want to do. Be sure to include appropriate remarks, if sending it back.
- Don't forget to hit the **"Save"** button.
- Now you can move on to the next plan.

Financial Plan #XXX

Edit Delete Printable View

Details Reports/Plans

Fin Report Period: Jan 2024 - Dec 2024

Chapter: AF342 Altus Chapter

Submission Status: Submit For Approval

State Approved: --None--

State Non-Approval/Need More Info: Please complete report

Education: AE1: Accomplished: General AE and STEM

Cancel Save

**NOTE:**

If at any time you have trouble regarding the new AFR process, or have any questions regarding this instruction, contact AFA Field Services at [field@afa.org](mailto:field@afa.org).



## Survey

How was your experience?  
Can we make it better?

Please tap or click here  
to take the post-instruction survey for the  
Sate Annual Financial Plan