



AFA Chapter Semi-Annual Report (SAR)

(Updated: August, 2026)

SPs and RPs: **See pages 19 & 20 for review process**

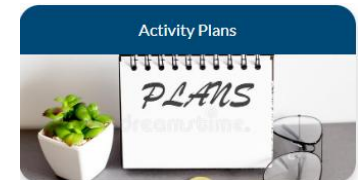
Introduction:

The Semi-Annual Report (SAR) is a way for you to capture and show the activities accomplished, income received and expenses incurred during the reporting period. Chapters are required to submit Semi-Annual Reports, complete Annual Plans, and update their Officer Rosters each year to remain in good standing and be eligible for any available support funding. Your SAR (approved by the State and Region Presidents) is normally due to Field Services by 31 July, so it's time to get started.

NOTE: Your 2026 1st Semester report is due 12 August to allow for the use for the newly instituted Semi-Annual Report format.

Preparation:

- 1) Before you even find and open a current Chapter SAR document, you should collect some information.
 - a) Pull up, or print a copy of your 2026 Annual Activity and Financial Plans from your organization's Field Leaders Portal. If you need assistance getting to it, the good folks at field@afa.org can help.
 - b) Make a list of the activities the Chapter accomplished over the past reporting period (in this case from 1 Jan - 30 Jun 2026). In addition to checking with your various VPs and Project/Program Managers you may wish to consider the following:
 - Previous Executive Council Meetings' minutes and treasurer's reports
 - Newsletters, Social Media postings and emails to the Council and Membership
 - Crosscheck all the above with bank statements for the reporting period
 - c) Next, categorize each event (to include deposits and expenses) by AFA Mission Areas (see the next page).



NOTE: Sometimes events will fit across multiple areas. You are quite welcome to list an activity in more than one of the mission areas. For example, a school program where you talk about the Air Force and its mission, provide a scholarship to an Airman's dependent, and recognize a CyberPatriot Team, would easily fit in three of the mission areas. **HOWEVER...only count deposits and/or expenses associated with an event once!**



Mission Area Descriptions

d) Here is a brief summary of the types of activities that are envisioned in the four mission areas:

(**NOTE:** These examples are illustrative. You are not limited to them.)

- i. **Education:** This area is about youth education; encouraging them to pursue STEM studies, and assisting educators in the same endeavor; promoting/participating/supporting CyberPatriot and StellarXplorers; working with Civil Air Patrol (CAP), AFJROTC and AFROTC units (to include Arnold Air Society and Silver Wings).
- ii. **Advocacy:** The first thing that comes to mind is working with your legislators. This is important, but the “advocate” mission is 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 and 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, AFA’s Wounded Airman Program, 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 chapter activities, to invite or encourage them to participate, and pass on other important AFA information. Newsletters, social media and social events are some good examples. In addition, we must continue to reach out to prospective members.

- 2) With an idea of what you've accomplished over the past semester, you are now ready to head to your Field Leaders Portal and start your new Chapter Jan - Jun Semi-Annual Report.
- a) With the new Activity & Financial reporting format, this Semester's report is going to be opened a little differently. At the very top of the page, select the Reports/Plans pull down menu.

The screenshot displays the AFA Field Leaders Portal interface. At the top, a dark navigation bar contains links for Home, Rosters, Membership Reports, Reports/Plans, and Other. The Reports/Plans link is highlighted with a red box and a red arrow pointing to it. Below this, a dropdown menu is open, showing options: All Plans / Reports, Activity Plan, Financial Plan, Activity Report, Financial Report, and Activity & Financial Report. The Activity & Financial Report option is highlighted with a red box and a red arrow pointing to it. Below the dropdown, the main content area shows the title 'Rosters, Reports & Plans' and a section for 'Activity & Financial Reports'. In this section, a 'New' button is highlighted with a red box and a red arrow pointing to it. The page also features a search bar, a list of filters (Chapter, Activity, Submissi..., State Pre..., State Pre..., State Pre..., Region Pr..., Region Pr..., Region A..., Last Modi...), and a status bar at the bottom indicating '0 items' and 'Sorted by Chapter'.

- b) Then select Activity & Financial Report.

- c) On the resultant page select New.

New Activity & Financial Report: Chapter Form

Chapter Report

Activity & Financial Report Period
--None--

Record Type
Chapter Form

* Chapter
Search Members / Prospects...

Submitted By (Name of the person)
[Empty field]

Chapter Email ⓘ
[Empty field]

Submission Status
Draft

Education

AE1: Accomplished: General AE and STEM ⓘ
--None--

AE4 Accomplished: TOY ⓘ
--None--

AE1: Remarks for General AE and STEM ⓘ
[Empty text area]

AE4 Remarks TOY ⓘ
[Empty text area]

AE1 AE and STEM Expenditure [Empty field] [Empty field] [Empty field] [Empty field] [Empty field] [Empty field] [Empty field] [Empty field] [Empty field] [Empty field]

Cancel Save & New Save Expenditures

d) **IMPORTANT:** Once you have the report open, take note that it is already in **Draft status**. On this version of the Report, this Status won't change until you actually submit the report...we'll cover that later.

e) You'll also notice that you can't initially save the new Activity Report until you have filled in the **name of your Chapter** (click on the box, start typing your Chapter Name (e.g. "af342") and select your chapter when it pops up).

f) Once that is done, your **chapter's Email address** will pop up the first time you "save" the report.

- g) As you begin filling in the blanks, remember to **SAVE** often.
- h) Use the pull-down menu to select the current **Activity Report Period** (January - June 2026 in this case).

The screenshot shows a web form titled "New Activity & Financial Report: Chapter Form". The form is divided into several sections. At the top right, there is a field for "Total of Other Income". Below this, on the left, is the "Chapter Report" section, which includes a pull-down menu for "Activity & Financial Report Period" (currently showing "--None--"), a search field for "* Chapter" (with the placeholder "Search Members / Prospects..."), and a "Chapter Email" field. To the right of the "Chapter Report" section, there is a "Record Type" field set to "Chapter Form", a "Submitted By (Name of the person)" field, and a "Submission Status" field set to "Draft". At the bottom of the form, there is an "Education" section with a pull-down menu (currently showing "--None--"). The bottom of the form features a navigation bar with three buttons: "Cancel", "Save & New", and "Save". Red arrows and boxes highlight specific elements: a box around the "SAVE" button in the instructions, a box around the "Activity & Financial Report Period" pull-down menu, a box around the "Submitted By" field, and a box around the "Save" button in the form's footer.

- i) Now...go ahead and load up the **name of who is submitting the report** to the state president.

3) Time to lay in the Activity information for each Category and Event (Finances will be loaded later to assure you account for them in their intended areas). Here are some helpful guidelines:

- a) EDUCATION is up first. Put some information in each space provided. Entering “None” or “N/A” (if your chapter didn’t do anything in a particular area) is preferable to leaving a Remark section blank. That way the reviewer knows you didn’t accidentally skip an item.
- b) Number or date each event.
- c) Leave a blank line between each event (if there is more than one).
- d) Remember...key points include **date**, **event title**, **location**, **how many attended** and **impact**. Also, don’t forget **names and titles** of important folks who were involved, or attended.
- e) You can also provide a remark when you’ve annotated “--None--” in the Accomplished box (e.g. Explain that an event was planned, but then had to be cancelled).

Edit Act-Fin Report # 57

Education

AE1: Accomplished: General AE and STEM ⓘ	AE4 Accomplished: TOY ⓘ
3	8
AE1: Remarks for General AE and STEM ⓘ 03 Jun: Chapter President printed up certificates (Pitsenbarger & Burley Bureson Awards) for CCAF graduation. Pitsenbarger Certificate had not yet been received by Altus AFB Education Office. 05 Jun: Chapter President attended Altus AFB CCAF graduation...100 in attendance to include 97AMW Wing Commander, Command Chief and 97AMW Group Leaders.	AE4 Remarks TOY ⓘ 23 Feb: Chapter President visited Altus Board of Education regarding prospective <u>ToY</u> . 25 Feb: Chapter President contacted Lawton Board of Education regarding prospective <u>ToY</u> . 30 Mar: Chapter Teacher of the Year (Selected and Processed through National AFA).
AE1 AE and STEM Expenditures \$450.00	AE4 AE and STEM Expenditures \$0.00
AE1 AE and STEM Expend Details 05 Jun: \$450.00 for Burley Bureson Award Check	AE4 AE and STEM Expend Details

Cancel Save & New Save

- f) Now, do the same thing for the **ADVOCACY, SUPPORT, COMMUNICATION** and **IRS 990** sections.
- g) If you need to take a break, go collect some more information, or want to come back to it another day...
- i. **Save** the report one more time before you close it.

HEADS UP: The AD4 and S3 Remarks Blocks are currently limited to 225 characters! There may be more...but those are the ones I ran into...keep your remarks relatively succinct in these blocks.

Edit Act-Fin Report # 57

Chapter Report

Activity & Financial Report Period
Jan 2026 - June 2026

Record Type
Chapter Form

Chapter
(OK) AF342: Altus Chapter

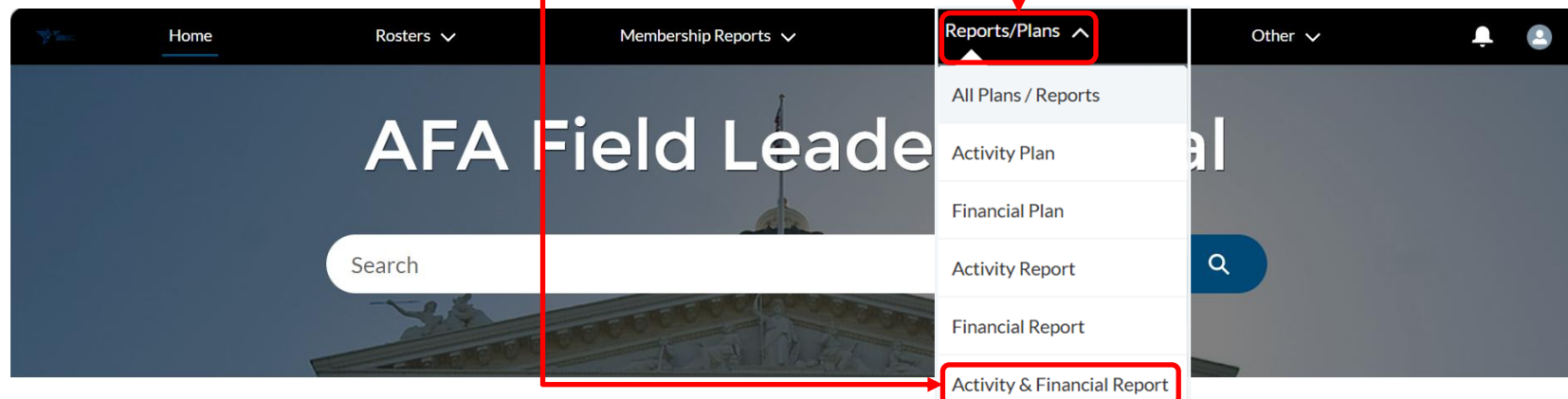
Submitted By
Chapter President
This field is calculated upon save

Chapter Email ⓘ
ok342.altus@afa.org

Submitted By (Name of the person)
Richard Baldwin

Buttons: Cancel, Save & New, **Save**

- ii. To bring it up later, simply head to the Field Portal home page and select **Reports/Plans** menu. Then select **Activity & Financial Report**.



Rosters, Reports & Plans



Activity & Financial Reports

All ▾ ↗

New

Printable View

1 Item • Sorted by Chapter • Filtered by All activity & financial reports • Updated a minute ago

Search this list...



Chapter ↑ ▾

Activity & Finan... ▾

Activity & Fin... ▾

Submis... ▾

State... ▾

State President ... ▾

State Presiden... ▾

Re... ▾

Region President Em... ▾

Re... ▾

Last Modified D... ▾

1

(OK) AF342: Altus Chapter

Jan 2026 - June 2026

Act-Fin Report # 57

State Review

Oklahoma

ok.president@afa.org

No / Need more info

Texoma

texoma.president@afa.org

7/29/2026 11:12 AM ▾

- iii. Find your report, and select the **numbered Activity Report** link.
- iv. Then, find and select **Edit** and you can get back to work!

Rosters, Reports & Plans



Activity & Financial Report
Act-Fin Report # 57

Submit

Edit

Details

Reports/Plans

▼ Instructions

Instructions

This report has been submitted to the State for review. No action is needed from the Chapter.

▼ Chapter Report

Finance “Stuff”

- 4) Now it's time to start loading your financial info!
- a) Cash in Bank & on Hand at Start: Towards the bottom of the report (In the Total Receipts and Disbursements section) input the amount that you started with at the beginning of the year. This amount should match the “END” number from your previous Financial Report.
 - b) Income from AFA National: Input the amount of income you received during this past semester from AFA National in support payments and other incentives (e.g., new members and renewal payments, etc.), even if they were earned in the prior semester.
 - c) Income from Community Partners: You can show this as the total amount you received from your CPs, or reflect the net income (subtracting the \$45/Partner you sent 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.

Edit Act-Fin Report # 57

Total Receipts and Disbursements

Cash in Bank & on Hand at START

AFA National Support Payments

Income from Community Partners

Other Income

Total of Other Income

CancelSave & NewSave

Note: Don't use these “Other Income” blocks...That type of Income is covered higher up in the Report.

5) Expenditures / Revenue:

- a) **Aerospace Education (AE)**: For any of the activities listed, include any Education Expenditures or Revenue in the provided blocks. The “Details” blocks allow you to state which activity (if more than one) the money was associated with.
- This semester, the labeling for education expenses and revenue leaves much to be desired. Just remember that AE4 funds are for (or are from) the AE4 activities.
 - Additionally, AE1 through AE7 have no “Revenue Details” blocks...if needs be, put the detail for revenue in the associated “Expend Details” blocks.
 - If you have education expenses or income that are not based on AE1-AE4 activities, use the AE5-AE7 areas to account for them.

Note: Unlike your activities, your finances for any activity can only be stated once! (e.g., if you 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 went towards Education and \$500 towards Support (or any other appropriate percentage) or list all of the \$1,000 in either Education or Support.

Edit Act-Fin Report # 57

Education

AE1 Accomplished: General AE and STEM ⓘ 3	AE4 Accomplished: TOY ⓘ 8
AE1 Remarks for General AE and STEM ⓘ 03 Jun: Chapter President printed up certificates (Pitsenbarger & Burley Burleson Awards) for CCAF	AE4 Remarks TOY ⓘ 23 Feb: Chapter President visited Altus Board of Education regarding prospective ToY.
AE1 AE and STEM Expenditures \$450.00	AE4 AE and STEM Expenditures \$0.00
AE1 AE and STEM Expend Details 05 Jun: \$450.00 for Burley Burleson Award Check	AE4 AE and STEM Expend Details
AE1 AE and STEM Revenue \$0.00	AE4 AE and STEM Revenue

Cancel Save & New Save

- b) **Advocacy (AD)**: Same drill as the previous section...For any of the activities listed, include any Advocacy Expenditures or Revenue in the provided blocks.
- This, and the rest of the sections have the same issue with having no “Revenue Details” blocks...if needs be, put the detail for revenue in the associated “Expend Details” blocks.
 - If (by chance) you have Advocacy expenses or income that are not based on AD1-AD4 activities, load them up in the “Other Income/Expenditures” section of the Report, just after the IRS 990 section.
 - Remember...don’t report the same income or expenditures more than once!

Edit Act-Fin Report # 57

Advocate

AD1 Accomplished: National/State ⓘ 2 AD1 Remarks National/State ⓘ 27 Feb, 25 Jun: Chapter President distributed bulk AFA Magazines to City of Altus Mayor, 97FSS AD1 Expenditures \$0.00 AD1 Expenditure Details AD1 Revenue \$0.00	AD3 Accomplished: Outreach ⓘ 10 AD3 Remarks Outreach ⓘ 15 Jan, 19 Feb, 19 Mar, 16 Apr, 21 May & 18 Jun: Chapter President gave a presentation on This Day in AD3 Expenditure \$0.00 AD3 Expenditure Details AD3 Revenue
--	--

Cancel Save & New **Save**

Note: You may have already observed that the boxes (with the two little diagonal lines at the lower-right corner) expand as they are filled. You can also manually expand the box to see all the information.

Note: Remember to save your work from time to time!

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

Edit Act-Fin Report # 57

Support

S1 Accomplished: Airmen/Guardians ⓘ 10 ▼ S1 Remarks: Airmen/Guardians ⓘ 29 Jan & 29 Apr: Chapter President delivered AAFB Quarterly Award (Oct - Dec 2025) incentives to 07 JANUARY 2026 - 29 APRIL 2026 S1 Expenditures \$873.41 S1 Expenditure Details 01 Apr: \$455.41 to Express Pac & Ship For 13 Leadership Awards and Certificates (Mil, Civ & ToY) 17 APRIL 2025 - 01 APRIL 2026 S1 Revenue \$0.00	S4 Accomplished:AFA Scholarships &Grants ⓘ 3 ▼ S4 Remarks: AFA Scholarships & Grants ⓘ graduation. Pitsenbarger Certificate had not yet been received by Altus AFB Education Office. 01 APRIL 2025 - 01 APRIL 2026 S4 Expenditures \$0.00 S4 Expenditure Details S4 Revenue
--	---

Cancel
Save & New
Save

- d. **Communications (C):** Fees under this section can include expenses for room rentals and food for meetings or events, software service purchases for mass emailing or newsletter production, or stipends to send delegates to a convention, video conferencing expenses, membership programs, webpage maintenance, or administrative (office) supplies.
- i. If (by chance) you have Communications income based on C1 through C5 activities, or Expenditures based upon C3 through C5 activities, again, load them up in the “Other Income/Expenditures” section of the Report, just after the IRS 990 section.

Edit Act-Fin Report # 57

Communications

C1 Accomplished:Membership Communication	C4 Accomplished: Chapter Meetings ⓘ
--None--	7
C1 Remarks: Membership Communication	C4 Remarks: Chapter Meetings ⓘ
Chapter Facebook Page and Quarterly Newsletter are awaiting a Chapter VP for Communications to be updated/published	15 Jan, 19 Feb, 19 Mar, 16 Apr, 21 May & 18 Jun): Chapter Meetings conducted at Luigi's Pizzeria...2 to 5 in attendance
C1 Expenditure	C5 Accomplished: Convention Delegates ⓘ
\$0.00	--None--
C2 Accomplished: Membership Activities ⓘ	C5 Remarks: Convention Delegates ⓘ
10	N/A

CancelSave & NewSave

- e) **Other Expenditures (EO) and Other Income (IN)**: If you have expenditures or income that fall outside the Educate, Advocate, Support or Communications, arenas (banking/administrative fees/income, the odd donation, or fund-raising programs for example) here's where you can account for them.

Edit Act-Fin Report # 57

Other Income/Expenditures

EO1 Other Expenditure #1	EO4 Other Expenditure #4
\$196.00	
Other Expenditure #1 Purpose	Other Expenditure #4 Purpose
chapter P.O. Box Rental	
IN1 Amount of Other Income #1	IN4 Amount of Other Income #4
\$4.40	
Source of Other Income #1 and Details	Source of Other Income #4 and Details
Chapter Bank Account Interest (Jan - Jun)	

EO2 Other Expenditure #2

Cancel

Save & New

Save

e #5

6) Finishing Up:

- a) Cash in Bank and on hand at END: For ***this semester only***, this number will have to be manually loaded somewhere CPs, SPs and RPs can see it to check entry accuracy (you'll notice I included it in "Additional Remarks". **This number** should reflect the following two things:

Additional Remarks

Cash in Bank and on hand at END: **\$1,533.61**

- 1) The funds your treasurer (or acting treasurer) determined you actually had on hand on 30 June, and...
- 2) It should also reflect the following calculation: **Cash in Bank & on Hand at START** (plus) **AFA National Support Payments** (plus) **Income from Community Partners** (plus) the **Total Income at the bottom of each of 4 of the 5 subject areas** (minus) the associated **Total Expenditures at the bottom of the same 4 subject areas** (minus) the numbers (if any) in the **C1 and C2 Expenditure area**.

▼ Total Receipts and Disbursements
Cash in Bank & on Hand at START
\$2,090.37
AFA National Support Payments
\$233.25
Income from Community Partners
\$585.00

C1 Expenditure
\$0.00

C2 Expenditure
\$0.00

Total AE Revenue
\$0.00
Total AE Expenditures
\$485.03

Total of Other Income
\$504.40
Total of Other Expenditures
\$196.00

Total Support Revenue
\$0.00
Total Support Mission Expenditures
\$838.38

Total AD Expenditures
\$360.00
Total AD Revenue
\$0.00

6) Finishing Up (cont):

- b. **PAY NO ATTENTION** to the numbers (if any) on the right side of the Total Receipts and Disbursements area, to include current Total Receipts, Total Disbursements and Total/Net Financial Activity.

✓ Total Receipts and Disbursements

Cash in Bank & on Hand at START

\$2,090.37

AFA National Support Payments

\$233.25

Income from Community Partners

\$585.00

Total Receipts

\$818.25

This field is calculated upon save

Total Disbursements

\$360.00

This field is calculated upon save

Total / Net Financial Activity

\$0.00

This field is calculated upon save

NOTE: This section will do all the addition and subtraction for you next Semester...but not this time around. Trust me...the Field Council has clearly voiced all your complaints on this particular “issue” to the development team.

Edit Act-Fin Report # 57

Chapter Report

Activity & Financial Report Period
Jan 2026 - June 2026

Record Type
Chapter Form

Chapter
(OK) AF342: Altus Chapter

Submitted By
Chapter President
This field is calculated upon save

Chapter Email ⓘ
ok342.altus@afa.org

Submitted By (Name of the person)
Richard Baldwin

Submission Status

Cancel Save & New **Save**

SAVE/SUBMIT/SAVE!

c) When you think you have finished the report, select **SAVE** one more time to lock in edits.

Rosters, Reports & Plans

Activity & Financial Report
Act-Fin Report # 57

Submit Edit

d) This puts you back at the top of the report where you can hit the **Submit** button.

Rosters, Reports & Plans

Submit

* = Required Information

Chapter
(OK) AF342: Altus Chapter

Workflow Action
Submit

Cancel **Save**

e) Finally, you'll hit **SAVE** one more time to convince the software that you really do want to send off the report.

7) Once you have your SAR submitted, your State President will give it a review.

a) The State President will either approve it (sending it up to the next level), or send it back down for corrections or clarifications as required.

b) If the State President does send it back to you, he or she should be very clear as to why, using the **State President Non-Approval/Need More Info block.**

c) If The State President Sends the report back to you for additional information or corrections, open your numbered report again...edit in the corrections or updates, and then go through the **SAVE/SUBMIT/SAVE** process again to sent it back to the State President.

d) Once the State and Region Presidents' submittal blocks indicate **"Yes"** the process is complete.

▼ **Approval Section**

State President Approved ⓘ

Yes

State President NonApproval/NeedMoreInfo ⓘ

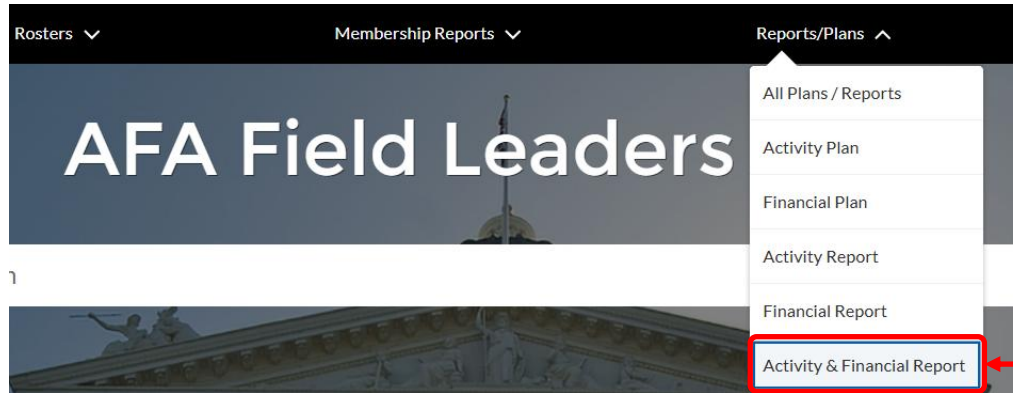
Activity & Financial Reports									
All ▼									
2 items • Sorted by Chapter • Filtered by All activity & financial reports • Updated a few seconds ago									
Q Search this list...									
Chapter ↑	Activity & Finan...	Activity & Fin...	Submission St...	State...	State President E...	State President Approved	Re...	Region Preside...	Region Approved
1	(OK) AF342: Altus Chapter	Jan 2026 - June 2026	Act-Fin Report # 57	Region Review	Oklahoma	ok.president@afa.org	Yes	Texoma	texoma.president... Yes

e) **Be pro-active**...the State and Region presidents in some cases have a large number of reports to review. As the SAR submission deadline approaches, a friendly phone call, text or email to your State President may be helpful if the State and Region approved blocks don't say "Yes".

State/Region-Level Approval Process For Chapter Reports

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

- a) First, select **Activity & Financial Report** from your Field Leaders Portal Reports/Plans Pull-Down Menu.



- b) Next, select the **numbered Act-Fin Report title** (not the Chapter Name) of the Report you want to review.

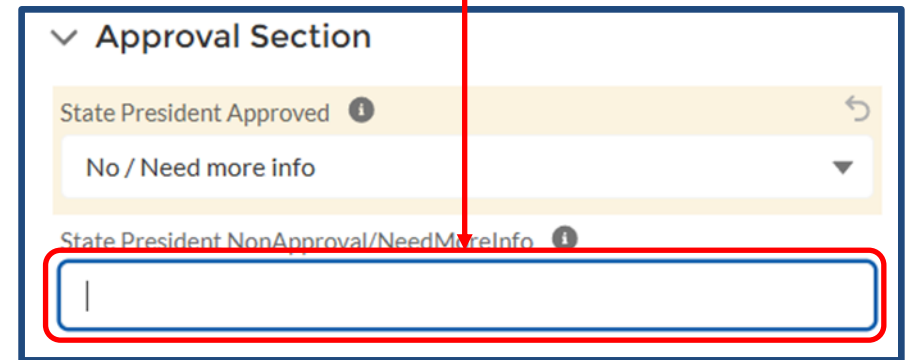
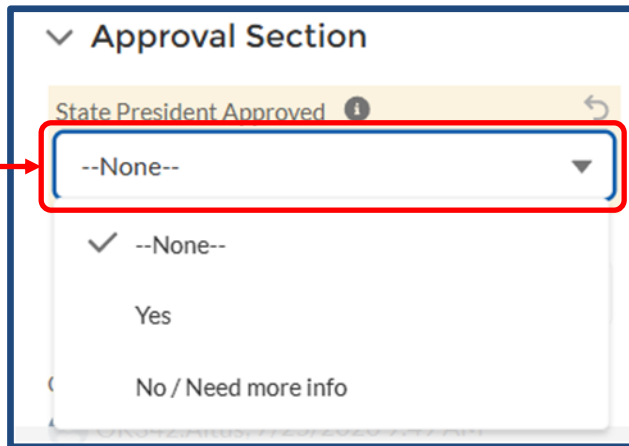
The screenshot shows a table titled 'Activity & Financial Reports' with a filter set to 'All'. Below the table header, it says '5 items • Sorted by Chapter • Filtered by All activity & financial reports • Updated a few seconds ago'. The table has five columns: 'Chapter', 'Activity & Finan...', 'Activity & Fin...', 'Submis...', and 'Draft'. The first row is highlighted, and the 'Act-Fin Report # 58' is circled in red, with a red arrow pointing from the text in step b) to this circled text.

	Chapter ↑	Activity & Finan...	Activity & Fin...	Submis...	Draft
1	(OK) AF215: Central Oklahoma Gerrity ...	Jan 2026 - June 2026	Act-Fin Report # 58		
2	(OK) AF268: Tulsa Chapter	Jan 2026 - June 2026	Act-Fin Report # 54	Region Re...	
3	(OK) AF342: Altus Chapter	Jan 2026 - June 2026	Act-Fin Report # 57	Region Re...	

State/Region-Level Approval Process For Chapter Reports

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

- e) Open the **pull-down menu** and select what you want to do. If you are sending it back to the chapter, be sure to include **appropriate remarks** to indicate what needs to be fixed.



- f) Finally, don't forget to go through the entire **SAVE/SUBMIT/SAVE** process again (see page 12).
- g) Now you can move on to the next report.

NOTE:

If at any time you have trouble regarding the SAR process, or have any questions regarding this instruction, contact AFA Field Services at 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
Chapter Semi-Annual Report (SAR)