AFA Chapter Annual Financial Plan (AFP)

The Annual Financial Plan is a way for you project and prepare for the activities that you wish to accomplish over the coming calendar year. Chapters are required to complete a Financial Plan to be eligible for support funding. (Note: This is not the only requirement...you must keep your Officer Roster updated, complete your Annual Activity Plan and submit your Semi-Annual Activity, and Financial Reports). So with that established...let’s get started!

1) Before opening up the Financial Plan, look to pull in some information.
   a) Last year’s or a previous year’s plan and/or reports
   b) Proposed Activity Plan, highlight obvious expenses (e.g., funding scholarships, travel, or a luncheon).
   c) Coordinate (meeting or email) with your Executive Council to discuss what you want to do over the course of the next 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, you can not show $1,000 as an Education and the same $1,000 as a Support expense. Instead you should either divide it up between the two areas, or list the entire amount in either area.
   d) As mentioned above, the plans (and reports) are organized along four overarching mission areas: Education, Advocate, Support, and Communication/Other. Here is a brief summary of the types of activities envisioned in the four areas (Note – these are illustrative only):
      i) Educate. Envision to be more about the education of our youth; encouraging them to pursue “science, technology, engineering, and math” (STEM) studies; promoting/participating/supporting CyberPatriot and StellarXplorers; work with Civil Air Patrol (CAP) and AFJROTC and AFROTC units (to include Arnold Air Society and Silver Wings).
      ii) Advocate. The first thing that comes to mind is associated with working with your legislators. This is important but the “advocate” mission is much more than just with our legislators. It includes state and local leaders and even the community at large. The goal is to promotes a community understanding of, and support for, a strong air, space, and cyber defense. Conducting forums and presentations help in promoting this understanding.
      iii) Support. Our Airmen (Active, Guard, Reserve, and AF Civilians (current and former) and their families are (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 just some examples of the types of activities that could be captured in this area.
      iv) Other (Miscellaneous Expenses). Lastly, it is recognize that some expenses just don’t fit in the three mission areas; this is where these expenses can be captured. For example, we must communicate with our members to ensure that we are meeting their needs. Newsletters, social media, and social events are ways to meet this area. In addition, we must continue to reach out to new/prospective and current members.
2) With an idea of what you would like to accomplish over the next year, you are now ready to log on and begin the work of inputting your plan into the system. You must have access to the AFA Field Portal. You will need the chapter’s User ID and Password...here we go!

a) Go to [www.AFA.Org](http://www.AFA.Org) on the web.

i. Find the solid blue banner along the top of the page, and select the "MEMBERSHIP & CHAPTERS", pull-down menu, then "AFA CHAPTERS".

ii. Along the right side of the page you will see four blue boxes. Click on the one titled "ACCESS FIELD LEADER PORTAL".
iii. This opens the page to log on. Here you will need to insert the Chapter’s **User Name** and **Password.** Note that the password is case sensitive.

iv. This opens the Field Leaders Portal Home Page. Along the right side of the page, under the blue box labeled **“Resources & Links”** is a link labeled **“Financial Plan”**. Click on that link.
3) Now you are ready to complete the Financial Plan. First step is to click on the drop-down menu under the “Financial Plan Period” and select “1 Jan 2020 - 31 Dec 2020”.

4) Cash in Hand at the Beginning of the Reporting Period: [Note – in boxes with $ in the remarks, these boxes are only for digits and decimals – DO NOT PUT $ sign or it will not accept when saved.]

5) Income planned for AFA National: (This is based upon anticipated support payments, $1.20/member (60 cents times 2 support payments) is a reasonable start.

6) Income planned from Community Partners: You can show this as the total amount/per partner or go ahead and reflect the net profit (subtracting the $45 required to National); just note if you claim the total income, you’ll need to show the $45/Partner as an expense in the Disbursement section.
7) Other Income? Are you planning for any additional income? This question is answered via a drop down menu – Yes or No. If Yes, then you will need to annotate the amount (numbers only) and type. There are four boxes to breakout the additional income. It is recommended if you have more than four areas that you group similar incomes (e.g. Lunches and then summarize the amount for the total and you can break them out in the description under the “Source of Other Income”.)
8) **Total Disbursements.**
   a) *Educate* – Under this section there is room to cover four areas. Like in the income section, if you have more than four expenses, it is recommend for the purpose of this plan to group like items (e.g., scholarships, Arnold Air Society support, etc.)

### Total Disbursements

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<tr>
<th>Expenditures in support of the Educate Mission? *</th>
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<td>Yes</td>
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<table>
<thead>
<tr>
<th>EEEd1 Amount of Educate Expenditure #1 $</th>
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<tr>
<th>Recipient of Educate Expenditure #1</th>
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<tr>
<th>EEEd2 Amount of Educate Expenditure #2 $</th>
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<table>
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<tr>
<th>Recipient of Educate Expenditure #2</th>
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b) **Advocate** – As with Educate, the Advocate section is similarly completed. Some type of Advocate Expenses could be a brochure and materials “advocating” for enhance aerospace mission. Perhaps a booth to promote the AF and its mission.
c) **Support** – The Support section is also broken out. Some examples are Wounded Airman Program, programs in support of Airmen and their families; and support for veterans.

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Expenditures in support of the Support Mission?
Yes

ES1 Amount of Support Expenditure #1 $

Recipient of Support Expenditure #1

ES2 Amount of Support Expenditure #2 $

Recipient of the Support Expenditure #2
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d) **Other** – Last section is to capture all other expenses. This could include the cost of newsletters, membership material and any other items that don’t fit in the above three.
9) Annotate who prepared the plan (e.g., Chapter Treasurer)

10) Saving the Plan. At any point you can go save this Plan by clicking on the "Save" button at the bottom of the screen.
a) To access a previously saved plan you must go back to the AFA Home Portal Screen [see above 2) a) iv)]. Chapter Activity Plan Instructions

b) On the Home Portal Page note the blue ribbon along the top. Find the “Saved Financial Report” and select that link.

c) You will see a “Financial Plan” and note that it will be annotated as “Draft”. Select the draft plan and it will open the report as it was when saved.

d) **Note:** If you don’t see your Plan, verify that the Financial Reports is reading “All” if not, open the drop down window (clicking on the ▼) and select “All”
i) You can print a hard copy of the draft plan by finding and selecting “Printable View” --- a button along the top right side.

ii) To edit (expand or modify) the existing draft plan, select the “Edit” button, also along the top, right side of the page. A pop-up window will open where you can make any changes desired.

iii) Once again you may select the “Save” button on the bottom of the screen to save and come back to the plan later.
e) Once you are ready to submit the plan for approval. Open the “draft plan” and select the “Edit” button.

f) At the top of the form just to the right of the “Activity Plan Period” there is a drop-down menu labeled “Submission Status”. Change the status from “Draft” to “Submit for Approval” then save the document one more time.

i) When you save the document this time, an email will be generated to the state president indicating that the chapter has submitted their Activity Plan for approval.

ii) If/when the State President approves the Plan it will be forwarded to the Region President for Approval. If the State President decides that the Plan requires additional information, it can be disapproved with comment and the chapter will receive an email indicating that additional information/clarification is required. If at any time you have an issue getting on the Portal or the form appears not to be working as described above please send an email to the AFA IT Staff through Field@AFA.org. If you have questions regarding these instructions or just need some additional help, you can contact Russ Lewey via email at FCTech2@AFA.org.
Survey

How was your experience?
Can we make it better?

Please tap or click here to take the post-instruction survey