

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 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 State and Region) is **due to Field Services by 31 December**...so lets get started.

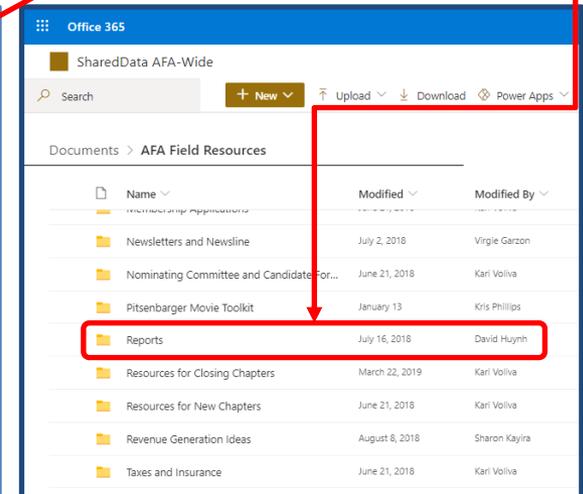
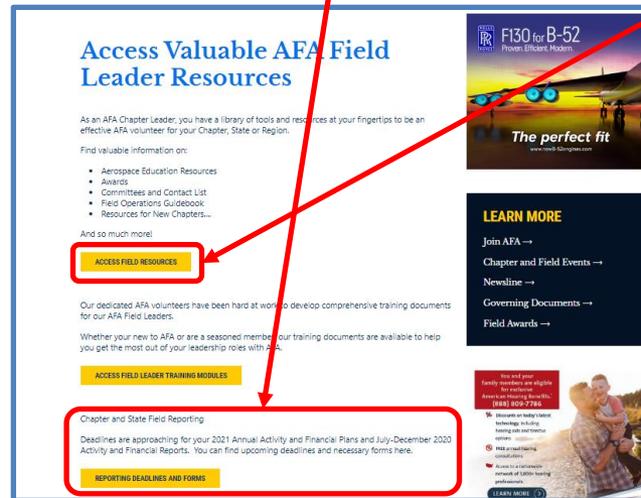
- 1) Before you even find and open a current Chapter AFP document, you should look to pull in some information.
 - a) Do you have a copy of last year's or a previous year's plan? If not, you can access last year's from your Field Leader's Portal, or have the good folks at AFA Field Services (field@afa.org) dig one up for you.
 - b) Review the proposed Activity Plan, highlight obvious expenses (e.g., funding scholarships, travel, or a luncheon).
 - c) Bring your Executive Council together to discuss and develop a plan 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.
- 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:* 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 this understanding.
 - iii) *Support:* Our Airmen & Space Professionals (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 chapter 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. Additionally, we must supply the chapter's administrative engine.

2) With an idea of what you would like to accomplish over the next year, you are now ready to find your copy of the Chapter 2021 Annual Financial Plan form. If your Region or State President hasn't sent it directly to you yet, click this [LINK](#), and follow the directions. If the link isn't working, here are three ways to get to the AFP form manually:

a) On your Field Leader's Portal you can dig into the Reports Folder hotlinked here.

b) Towards the bottom of the Resources for Chapter Field Leaders Page (best bet)

c) Or, in the Reports Folder via the Field Resources hotlink.



d) What ever way you download the document, use the "Save" or "Save As" function to put the document where you want it and give it a specifically formatted file name.

e) National AFA would like all Chapter AFP documents to have the following file name format:

f) 2-Letter State & Chapter # <period> YYYY <period> & 3-letter plan name: **ME444.2021.AFP**

3) This year the Chapter AFP comes in **three different formats** for your convenience.

- a) **Microsoft Excel**: Probably the best bet for folks who are comfortable with the format, can keep their comments and remarks short, and plan to print up copies from time to time.
- b) **PDF (scrolling text)**: Easy to fill in. Easy to read. If you enter more information than will fit in the visible spaces of the “Details” and “Comments” you can use the box’s scroll bar to read it, but any text that is not visible will not appear when the document is printed (on paper, or electronically). Best for chapters who have either gone paperless, or can keep their details and comments within the confines of the space provided.
- c) **PDF (shrinking text)**: Easy to fill in. If you need more space than allowed by the “Details” and Comments” boxes, the font will automatically shrink to fit the space, so that all the information will display when printed. There is a minimum print size, and if you reach it, the form will not let you add any more information in that box. Perfect for folks who print up copies from time to time, but need just a bit more space than provided for details and comments.

Note:

- In the PDF documents...expense amounts **MUST** be entered as negative numbers. Tooltips and error messages will remind you to do this. These forms will do the math for you.
- All documents...**DO NOT** enter dollar signs in the amount fields; they will be provided automatically.

4) Now you are ready to complete the Financial Plan.

- a) The first step is to fill in your chapter name/number, along with your state and region...there should be plenty of room to spell it out.



**AIR FORCE ASSOCIATION
2021 Chapter Financial Plan**

Chapter Name/AFA #:

State:

Region:

- 5) Cash in Hand at the Beginning of the Reporting Period: ***[Note: In PDF documents do not enter dollar signs in the amount fields; they will be provided automatically.]***

CASH IN BANK AND ON HAND AT BEGINNING OF REPORTING PERIOD:	<input type="text"/>
INCOME: (will automatically update from the Income fields on page 2)	
AFA National Support Payments:	\$0.00
Income from Community Partners:	\$0.00
Other Income:	\$0.00
TOTAL INCOME:	\$0.00

- 6) Income planned from AFA National: These payments are suspended at the time of this instruction. Plan for \$0.00 this year.

Income	
<u>AFA National Support Payments</u>	
1st half	\$0.00
2nd half	\$0.00
Total:	\$0.00
<u>Income from Community Partners</u>	<input type="text"/>

- 7) Income planned from Community Partners: You can show this as the total amount you received 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.

- 8) Other Income: If you are planning for any additional income, you will need to **enter the amount** (numbers only) and **Source**. There are six boxes to accommodate additional income. If you have more than six 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 “Remarks” box.

Other Income

Source:	<input type="text"/>	<input type="text"/>
Remarks:	<input type="text"/>	
Source:	<input type="text"/>	<input type="text"/>
Remarks:	<input type="text"/>	
Source:	<input type="text"/>	<input type="text"/>
Remarks:	<input type="text"/>	

9) Expenditures.

- a) **Education:** Under this section there is room to cover three areas. Like in the income section, if you have more than three expenses, group like items (e.g., scholarships, Arnold Air Society support, etc.). Recall, expenditure numbers must start with a minus (-) sign!

<h2>Expenditures</h2>	
Aerospace Education Expenditures	
Program/Activity:	<input type="text"/>
Remarks:	<input type="text"/>
<input type="text"/>	
Program/Activity:	<input type="text"/>
Remarks:	<input type="text"/>
<input type="text"/>	
Program/Activity:	<input type="text"/>
Remarks:	<input type="text"/>
<input type="text"/>	
<u>Aerospace Education Total</u>	<input type="text" value="\$0.00"/>

- b) **Advocacy:** Complete the Advocacy section the same way you did the Education section. Some type 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.

Advocacy Expenditures:	
Program/Activity:	
Remarks:	
Program/Activity:	
Remarks:	
Program/Activity:	
Remarks:	
Advocacy Total	\$0.00

- 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.

Support Expenditures:	
Program/Activity: <input type="text"/>	<input type="text"/>
Remarks: <input type="text"/>	
Program/Activity: <input type="text"/>	<input type="text"/>
Remarks: <input type="text"/>	
Program/Activity: <input type="text"/>	<input type="text"/>
Remarks: <input type="text"/>	
<u>Support Total</u>	<input type="text" value="\$0.00"/>

d) **Communication:** Enter you communications expenditures here. This could include the cost of newsletters, video conferencing, membership programs, webpage maintenance, and administrative (office) supplies.

Communication Expenditures:	
Program/Activity: <input type="text"/>	<input type="text"/>
Remarks: <input type="text"/>	
Program/Activity: <input type="text"/>	<input type="text"/>
Remarks: <input type="text"/>	
Program/Activity: <input type="text"/>	<input type="text"/>
Remarks: <input type="text"/>	
<u>Communication Total</u>	<input type="text" value="\$0.00"/>

- 10) Make sure the **END OF REPORTING PERIOD total** is what you expected!
- a) Did it capture all the proposed items?
 - b) Too many, or too few zeros on an item?

CASH IN BANK AND ON HAND AT END OF REPORTING PERIOD: \$0.00

CHAPTER COMMENTS:

STATE COMMENTS:

REGION COMMENTS:

- 10) **Additional Comments:** This section is available for those times when the Chapter, State, or Region President may want to add additional information or clarification.

12) The Approval Section:

- a) The first blocks in this section of the form are reserved for the Treasurer's typed name, and date submitted to the Chapter President.

Submitted by	<input type="text"/>	<input type="text"/>	Approved:	<input type="text"/>	<input type="text"/>
	Chapter Treasurer	DATE		Chapter President	DATE
Approved:	<input type="text"/>	<input type="text"/>	Approved:	<input type="text"/>	<input type="text"/>
	State President	DATE		Region President	DATE

- b) Once Chapter President approves the AFP with his or her name and date, email it to the State President (Region President if you are the only chapter in your state).
- c) The State / Region Presidents will review the AFP, in turn, and either approve it (with their name and date on the form), or send it back down for corrections or clarifications as required. Any request for clarifications or corrections should be clearly stated in the appropriate Comments block.
- d) Once approved, the Region President will email the Chapter Annual Financial Plan to field@afa.org.

Note:
If at any time you have an issue obtaining a Chapter AFP Excel or PDF form, or have any questions regarding these instructions, 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](#)