

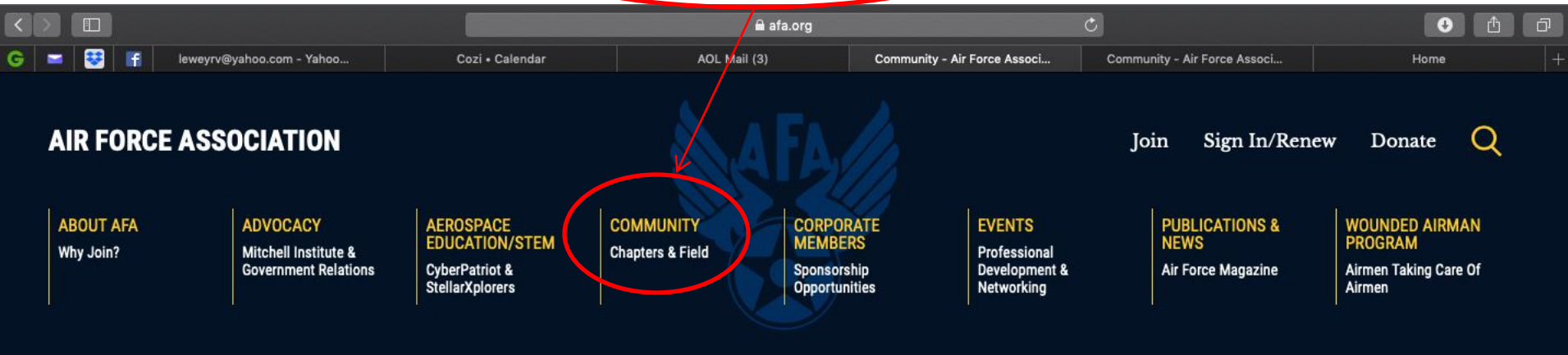
AFA Chapter Financial Plan



The Activity and Financial Plans are a way for you to prepare for the activities that you wish to accomplish over the coming year. The Activity and Financial Plans project for the calendar year. Chapters are required to complete an Activity and a Financial Plan to be eligible for support funding. (Note this is not the only requirement, you must also update your Officer Roster and to complete the 2nd Half 2018 Activity and Financial Reports). It is recognized that the Financial Plan requirements are slightly expanded from previous years. Recently there have been instances requiring the Field Council and/or AFA Staff to extract how much chapters (and states) were spending on activities such as support (e.g. Wounded Airmen) or for advocacy (promoting aerospace dominance). It was determined to have chapters/states break this funding out to ease future retrievals. Chapters are requested to use their judgment in determining the expense category (Educate, Advocate, Support, or Other). There is no “hard rule” when a project/expense covers multiple mission areas, chapters may decide to split the expense across multiple areas; however, for others, placing all the expense in the predominant area will be the more prudent approach. In any case, clarifications can be included (but not required) in the section describing the expense.

- 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 would like to do over the course of the next year. 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 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 (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 a plan 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.

- a) Go to AFA.Org on the web.
 - i) Along the top line of tabs you will see the "COMMUNITY Chapters & Field". Click on that tab.



- ii) Along the right side of the page you will see three blue boxes, the middle one being "ACCESS FIELD LEADER PORTAL." Click on that box.

We want our community to feel empowered with the latest knowledge. And then with that knowledge—take action. AFA continuously works to connect members both in-person and at their convenience online. From local chapter meetings to 9,000-attendee conferences, you can feel connected to your AFA member community anywhere, and at any time. Being an Airman isn't a part-time job. It's a lifelong honor.

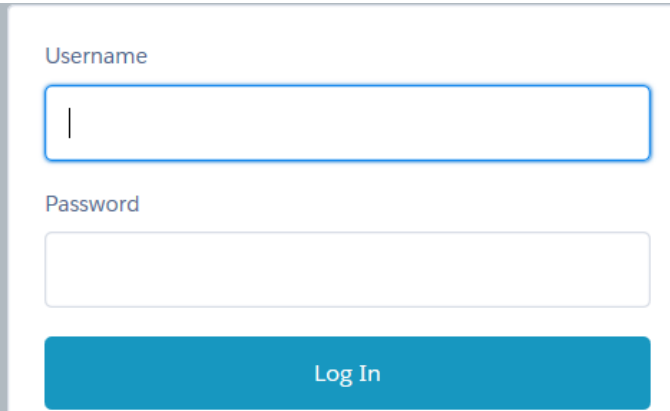
Find Your Chapter

[ACCESS FIELD LEADERS RESOURCES](#)

[ACCESS FIELD LEADERS PORTAL](#)

[ACCESS FIELD EMAIL](#)

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.

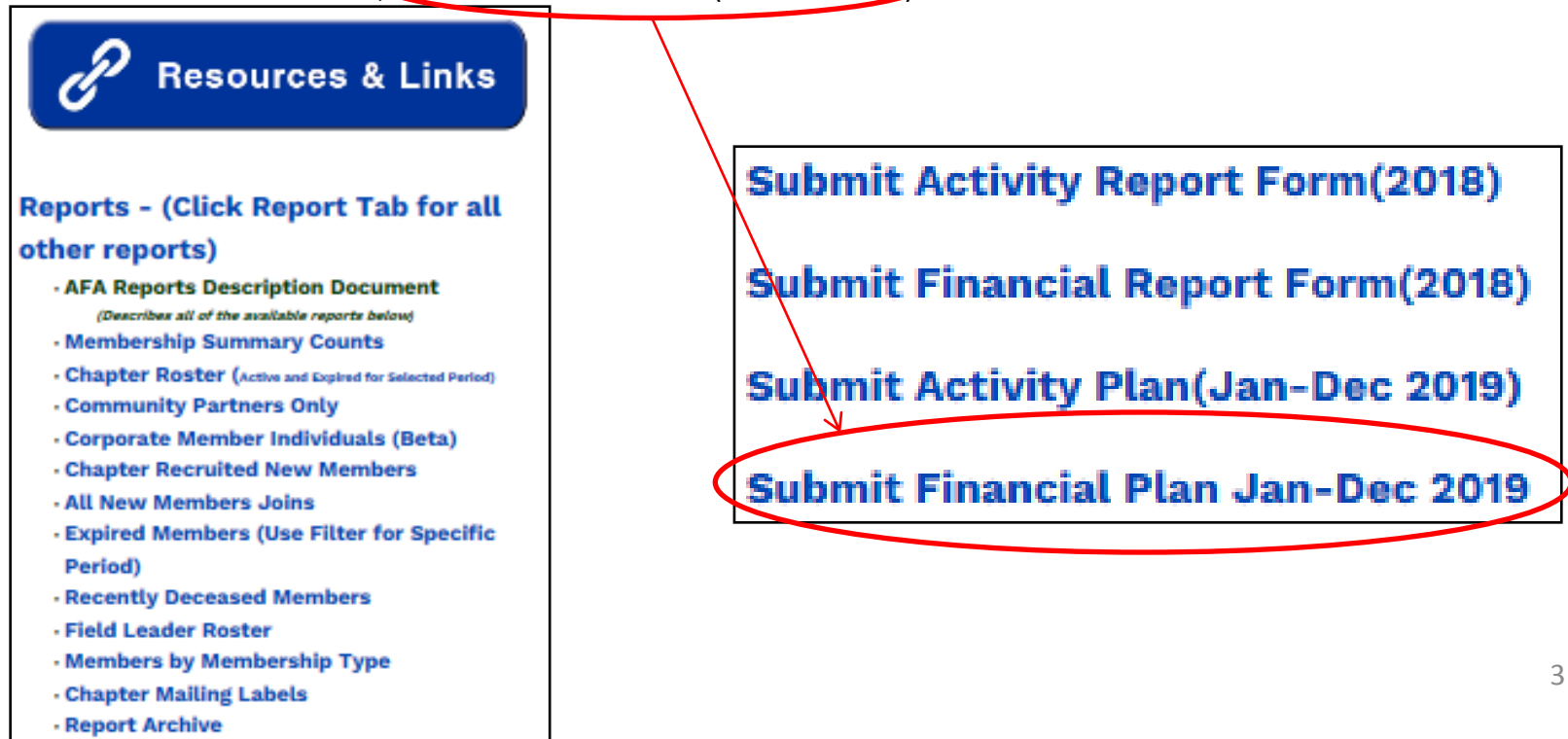


Username

Password

Log In

iv) This opens the Field Portal Home Along the right side of the page under the blue box labeled "Resources & Links". **Scroll down a bit** and find a link that is labeled, "Submit Financial Plan (Jan-Dec 2019)". Click on that link.



Resources & Links

Reports - (Click Report Tab for all other reports)

- **AFA Reports Description Document**
(Describes all of the available reports below)
- **Membership Summary Counts**
- **Chapter Roster (Active and Expired for Selected Period)**
- **Community Partners Only**
- **Corporate Member Individuals (Beta)**
- **Chapter Recruited New Members**
- **All New Members Joins**
- **Expired Members (Use Filter for Specific Period)**
- **Recently Deceased Members**
- **Field Leader Roster**
- **Members by Membership Type**
- **Chapter Mailing Labels**
- **Report Archive**

Submit Activity Report Form(2018)

Submit Financial Report Form(2018)

Submit Activity Plan(Jan-Dec 2019)

Submit Financial Plan Jan-Dec 2019

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 “January – December 2019”

2019 Financial Plan/Report

Financial Plan Period

--None--

Cash in Hand & On Hand At The Beginning Of The Reporting Period (\$) *

Income From AFA National \$ *

Income from Community Partners? \$

- 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”.

Other Income. (Do you have other income to report?) *

✓ --None--
Yes
No

Please enter the name of the Company/Person that provided the "Other Income" in the fields below.

IN1 Amount of Other Income #1 \$

Source of Other Income #1

IN2 Amount of Other Income #2 \$

Source of Other Income #2

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

Expenditures in support of the Educate Mission?

EEd1 Amount of Educate Expenditure #1 \$

Recipient of Educate Expenditure #1

EEd2 Amount of Educate Expenditure #2 \$

Recipient of Educate Expenditure #2

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.

Expenditures in Support of the Advocate Mission?

EAd1 Amount of the Advocate Expenditure #1 \$

Recipient of the Advocate Expenditure #1

EAd2 Amount of the Advocate Expenditure #2 \$

Recipient of the Advocate Expenditure #2

EAd3 Amount of the Advocate Expenditure #3 \$

Recipient of the Advocate Expenditure #3

- 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.

Expenditures in support of the Support Mission?

--None--

ES1 Amount of Support Expenditure #1 \$

Recipient of Support Expenditure #1

ES2 Amount of Support Expenditure #2 \$

Recipient of the Support Expenditure #2

- 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)

Prepared by

REPORT WILL BE SAVED IN DRAFT FORMAT

Please see below steps to update

To update or To Submit for the Approval Process:

1. Go to Home screen of the Field Portal
 2. Click "Save Financial Report" tab and locate your report that you just saved
 3. Click the Financial Report that you want to open (will be blue hyperlink)
 4. Click Edit button (will be on the right hand side)
 5. A pop window will appear and make changes
 - 6 . Update the "Submission Status" field on the top from "Draft" to "Submit for Approval" to start the Approval Process.
- Note: This will email State President to approve. State President has to login to the Field Portal and follow the steps to approve.



10) Saving the Plan. At any point you can go save this Plan by clicking on the "Save as draft" 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.

Air Force Association Field Leaders Portal

Home View of Members All Reports Chapter Field Leaders Saved Activity Report **Saved Financial Report** Community Partner Companies and Contacts

Welcome to Field Portal!

Please use Chrome as your browser for best performance.

Activity and Financial Plans are due December 31. Bi-annual Activity and Financial Reports are due January 31. Please click here for instructions and training documents: [Training Documents Link](#)

For technical support, please contact fieldportal@afa.org. For other issues, please contact field@afa.org.

The AFA offices will be closed from December 22 until January 2 and all messages will be returned when the office reopens.

Financial Plans
All

2 items • Sorted by Financial Plan Name • Filtered by all financial plans • Updated 3 minutes ago

	FINANCIAL PLAN...	CREATED DATE	SUB...	STATE N...	ST...	REGION NAME	RE...	OWN...	OWNER LAS...	OWN...	LAST MODIFIED...
1	34	7/8/2018 10:35 AM	Draft	Oklahoma		Texoma Region		AF342	Altus Chapter	AF342	11/12/2018 8:51 PM
2	Financial Plan # 168	12/20/2018 4:15 PM	Draft	Oklahoma		Texoma Region		AF342	Altus Chapter	AF342	12/20/2018 4:15 PM


- c) You will see an "Saved 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.

- 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.

Welcome to Field Portal!

* Please send feedback on AFA's Field Leader Portal to field@afa.org and report technical issues to fieldportal@afa.org. Field Portal does not support Microsoft Edge.

[Training Documents Link](#)
[How to Update Your Officer Roster Training Link](#)

 Financial Plan
Financial Plan # 111

[Edit](#) [Printable View](#)

DETAILS RELATED

▼ Chapter Submission Section

- d) Once you are ready to submit the plan for approval. Open the “draft plan” and select the “Edit” button.
- d) 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**.

Air Force Association Field Leaders Portal



Search



AF342 Altus Chapter

Home

View of Members

All Reports

Chapter Field Leaders

Saved Activity Report

Saved Financial Report

Community Partner Companies and Contacts

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Financial Plan
Financial Plan # 168

Edit

Printable View

Edit Financial Plan

Chapter Submission Section

Chapter Name

AF342 Altus Chapter

Submission Status ⓘ

Submit for Approval

- 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 at FieldPortal@AFA.org. If you have questions regarding these instructions or just need some additional help, you can contact Russ Lewey via email at SouthCentral.President@AFA.org.

