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. It should be a pdf or Excel document on your system. If you can’t find it, your region president should have a copy. As a last resort, the good folks at field@afa.org can dig it up for you.
   b) Bring your Executive Council 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.

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.
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 State Annual Financial Plan.
   a) At the top of your Field Leaders Portal, select **Reports/Plans**.
   
   ![Image of Field Leaders Portal with Reports/Plans selected]

   b) Then select, or tap on **All Plans/Reports**.

   ![Image of Field Leaders Portal with All Plans/Reports selected]

   c) On the resultant page, select your state organization.

   ![Image of Field Leaders Portal with State of Oklahoma selected]
e) On this page, since you are starting a new Financial Plan, select the associated New button.

f) IMPORTANT: Once you have the blank 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.
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).

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.
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 (2021).

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.
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!
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

<table>
<thead>
<tr>
<th>Advocacy Expenditures</th>
<th>Advocacy Expenditure #1 Purpose</th>
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<tbody>
<tr>
<td>EAd1 Advocacy Expenditure #1</td>
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<td>EAd2 Advocacy Expenditure #2</td>
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<td>Advocacy Expenditure #2 Purpose</td>
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<td>Advocacy Expenditure #3 Purpose</td>
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<tr>
<td>Advocacy Expenditure #4 Purpose</td>
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<tr>
<td>Total Advocate Expenditures $0.00</td>
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</tbody>
</table>

**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.
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.

**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?

b) The **Approval Section** at the end of the form is reserved for the Region, and National-level approval process.
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).
Here is the procedure to review chapter plans when they come to you:

a) From your Field Leaders Portal, Select **Financial Plans**.

b) Select the **Financial Plan** of the Chapter you want to review.

c) When the plan comes up, give it a thorough review, top to bottom.

d) 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**.

e) Then, open the **pull-down menu** and select what you want to do. Be sure to include appropriate remarks, if sending it back.

f) Don’t forget to hit the “Save” button.

g) Now you can move on to the next plan.
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.

Survey
How was your experience?
Can we make it better?

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