

**USING THE PLANNING AND REPORTING TEMPLATE FOR 2009**  
**INSTRUCTIONS FOR DEVELOPING REGION/STATE/CHAPTER ANNUAL ACTIVITY  
PLANS AND COMPLETING QUARTERLY ACTIVITY REPORTS**

Use this template to develop annual activity plans for regions (optional), states (optional), and chapters. Use the SAME template for chapter and state quarterly activity reports (required) and regions (optional). To simplify the planning and reporting process at all levels, plans and activity reports for 2009 MUST be submitted using this template. Regions and states will assist chapters as necessary.

The planning template is adapted from the AFA Strategic Plan for 2009-2013 and contains the Strategic Themes and Goals that apply to AFA regions, states, and chapters. Only those goals that apply to the field are included. AFA National Goals are omitted. (All goals for Theme 5 and 6 apply to AFA – National/Headquarters). There are blank rows for each region, state, and chapter to include additional goals if desired. Do not delete any rows, but you may add as many rows as you wish for your plan. Refer to the Air Force Association Strategic Plan for 2009-2013 for additional information as needed.

**ANNUAL ACTIVITY PLANS.** Use this template to build your Annual Activity Plan (required for chapters, optional for states and regions). Complete the "Header" information and indicate that this is your plan for 2009 by placing an "X" in the block marked "Annual Activity Plan." Complete the rest of the plan by placing the number of activities (1, 2, 3, etc.) that you plan to conduct for each goal during that quarter in the column marked "P" for *Planned*. For each Goal, briefly explain in the remarks section what activity is planned. For example: "Conduct Teacher Workshop in mid Feb." If you put a number in the "P" column, you must include a brief explanation in the "Remarks" column. Some goals may not apply to your organization. If so, leave that block blank. There is no requirement to complete all goals. After you have completed the plan and endorse it, save the file with your chapter number and label it (for example, as "398AAP2008"). E-mail this plan to your State President for review and endorsement. He or she will date and type their name in the appropriate "certified" block and then forward to the Region President for review and endorsement. The Region President will forward it to AFA Headquarters for processing. The 2009 Annual Activity Plans are due to AFA Headquarters not later than 31 December 2008.

**QUARTERLY ACTIVITY REPORTS.** Use your completed Annual Plan as a starting point to file out your first Quarterly Activity Report (required for chapters and states, optional for regions). Open your Plan and "Save As," relabeling the filename for the current quarter report. Complete the "Header" information, making sure it is marked as a Quarterly Report (not annual plan) and indicate the appropriate Quarter by placing an "X" in the block marked, "Jan-Mar." Complete the report by placing the number of activities actually "*Accomplished*" for that quarter in the "A" column (1, 2, 3, etc. Do not simply place an "X" or "check"). If you put a number in the "A" column, you must make corresponding comments in the "Remarks" column to explain each activity. First, delete all remarks remaining from the previous Plan (but always keep the numbers in the "planned" column) then **replace them with new remarks that explain what that activity was** (the who, what, where, when, etc of what took place). For example, "Conducted teacher workshop on 2/11/08 at Hurlburt Field, FL with 65 teachers in attendance." If more detailed information is required than will fit in the normal remarks section, continue them in the remarks section at the end of the report (Refer the reader to the end). Be sure to reference the Theme number and block (e.g. 2a) when continuing remarks at the end.

**Special Interest Item for scholarships:** Also include details (name of individual receiving the scholarship, name of the institution, amount, date awarded) on any

**scholarships that the chapter/state funds or presents so our association can track these contributions.**

For each follow-on quarter, you should again open the previous quarter's report, "save as," mark the appropriate quarter, and delete the remarks section from the previous quarter (but keep the number of events accomplished for the previous quarter in the "A" column). Then, fill out the "accomplished" column for the current quarter and use the remarks section to explain your new quarter events. Once completed, endorse and save this file. E-mail this report to your State President for endorsement and forwarding to HQ AFA via the Region President.

Additional Notes:

1. Chapter goals are numbered according to the Strategic Theme they support.
2. Chapter goals are grouped by "conduct or support" goals, or "other" goals in order to align with the support payment plan which requires a different number of goals of each type to qualify for full support payments (see payment formula).
3. State Presidents (RPs in their absence) will mark the number of qualifying events accomplished by a chapter in the appropriate block marked "For State Use Only" under each category of goal (e.g. "Conduct or Support" or "Other"). **The State President is primarily responsible for ensuring activities meet the spirit and intent of the goal, based on the remarks provided by the Chapter president.** If in doubt, they should ask for clarification.
4. Chapters should mark whether they believe they have met the quarterly membership recruitment goals and have submitted a quarterly newsletter (or indicate if it is excused that quarter), but AFA Headquarters will determine whether those two goals have been met. The membership goal will be determined by the number of qualified memberships actually received at AFA Hq by the appropriate deadline (using a rolling 12 month look-back). In addition, they must have a copy of the newsletter on file, or an excusal from the State president (Region president (RP) in the absence of a State organization) in order to give credit for the newsletter goal.

**THE 2009 CHAPTER SUPPORT PAYMENT FORMULA**  
**Rosters, Plans, Reports – Required to Pass "GO"**  
**(No Paperwork – No Money)**

- 25% -- Membership (0.75%)
  - 25% -- Newsletter
  - 25% -- Complete 1 "Conduct-Support" Goal
  - 25% -- Complete Any Other Goal
    - Another "Conduct-Support" Goal
    - Other ("Contact-Select-Invite") Goal
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- 25% Bonus -- Complete All of the Above & Either:
    - 1.5% or Greater Membership Recruitment
    - or-
    - Complete Additional "Conduct-Support" Goal

**Additional Bonus: Other Than Education (OTE) Matching Grant**  
**(Complete 100% support requirement first)**