

## ***How does becoming a beta-test chapter impact the time and attention of chapter leaders and Chapter Executives?***

As your chapter considers whether to apply to become a beta-test chapter, we want to provide more details on what chapter leaders and Chapter Executives can expect from participating. Our intention and commitment is to make the beta-test as easy and effective as possible. Of course, there will be assessments and important learnings throughout the process, but the aim is to create a productive and supportive experience for all involved.

We have a deep sense of confidence that beta-test chapters will have a positive experience as strategies are more powerfully aligned, operations are more effectively coordinated and a culture of mutual respect and collaboration is nurtured in support of chapter activities and an enhanced member experience. For example, as it relates to phasing in key elements of an integrated technology solution to enhance the member experience, Chapter Executives will be key participants in designing and implementing the details, process and timing of our approach to centralized technology.

### **Beta-Test Chapter Executives: *What is the time commitment?***

To build a supportive team culture and to educate staff on the people and resources available to them, Chapter Executives can anticipate approximately eight additional hours per month of their time for FPA-related collaboration. The following are the lineup of anticipated meetings:

- A monthly virtual 90-minute FPA all-staff meeting that is primarily geared towards team building and general information sharing. (Note: these are scheduled months in advance and are also recorded for staff that cannot make the meeting).
- A one-hour virtual meeting twice per month with the Chapter Executive Team to go over specific issues and requests and align FPA resources where appropriate. (Note: These will be scheduled to accommodate the calendars of as many Chapter Executives as possible and will be recorded).
- A one-hour quarterly check-in meeting with each Chapter Executive and Chapter President facilitated by a national volunteer leader and/or national staff member to assess how the beta-test and relationship is progressing and to uncover any adjustments that are needed.
- A special orientation for Chapter Executives at the OneFPA Chapter Leaders Conference (CLC) as a welcome and basic review of resources available to Chapter Executives and may also include training on FPA software and programs.
- A two-day in-person orientation in Denver for a deep dive review of all the resources available to Chapter Executives and for training on any processes and technology-related elements that are being implemented.
- A one-hour annual staff review meeting, based on FPA's "vision and goals" process, which provides an opportunity for Chapter Executives to explore with their staff direct report, accomplishments from the previous year and opportunities for growth in the coming year. Feedback from the chapter's key volunteer leaders will be included in the vision and goals meeting.
- It is possible that there may be other very occasional meetings as important issues arise, where participation by the Chapter Executive would be beneficial.

From a cost standpoint, additional hours for Chapter Executives related to the beta-test will be borne by the chapter. Additional tangible costs, such as travel expenses to special meetings (outside of CLC) and additional beta-test hardware and software needs will be borne by FPA.

Beyond the regularly scheduled meetings listed above, the amount of additional time that a beta-test Chapter Executive gives to this effort is dependent on the needs and desires of the Chapter Executive and their respective chapter. With respect to coordinating the chapter chart of accounts, there will be some initial effort to get everyone on the same reporting system, but the benefit is the ability to provide benchmarking reports to support the strategic planning and budgeting efforts of the beta-test chapters.

### **Beta-Test Chapter Executives: *What is the value proposition?***

While all chapters have the opportunity to work directly with FPA staff, we find that Chapter Executives who are FPA staff are more connected to—and more deeply aware of the resources available to them—have the opportunity to collaborate with various FPA departments more seamlessly. For example:

- A Chapter Executive may reach out to Kyle Jordan, FPA’s director of conferences and meetings, for assistance with negotiating a hotel contract or to learn about a process for evaluating conference performance.
- A Chapter Executive may reach out to Ben Lewis, FPA’s director of public relations, to help with dealing with a media issue or to set-up a media training for the chapter’s volunteer leaders.
- A Chapter Executive may want to dive more deeply with Cynthia Jackson, from FPA’s chapter engagement team, on setting up an effective orientation for chapter board members or help in facilitating a strategic planning session with the chapter’s board.

The value available to Chapter Executives depends on the extent they want to connect to the possibilities.

### **Beta-Test Volunteer Leaders: *What is the time commitment?***

While a successful OneFPA Network beta-test requires that chapter and national volunteer leaders and staff to work together to design and assess the experience, we are sensitive to the time that volunteer leaders give to FPA already and have developed a framework that will be both meaningful and doable for volunteers. At most, we expect to ask for one volunteer leader from each beta-test chapter to participate on either the OneFPA Resource Coordination Committee or OneFPA Staffing Coordination Subcommittee. We anticipate these committees to meet virtually one-hour each month. The two new OneFPA committees will have full staff support and will operate on a strategic level, so the time required of volunteer leaders to serve on these OneFPA committees will be manageable. For more information on these committees, please refer to the Final OneFPA Network Plan at [www.OneFPANetwork.org](http://www.OneFPANetwork.org). Additionally, time may be allocated to:

- A one-hour quarterly meeting with the Chapter Executive and the Chapter President to assess how the relationship is progressing and to uncover any potential adjustments.
- A one-hour meeting annually to complete and review a Chapter Executive Evaluation Form.

## **Top 10 Reasons Why You Should Apply to Become a Beta-Test Chapter**

1. Be a leader in elevating the chapter system.
2. Relish the additional resource opportunities that comes from greater collaboration.
3. Become an early adopter of new technologies and augmented data sharing.
4. Take advantage of enhanced volunteer and chapter leader training.
5. Share and learn from integrated reports and elevated information sharing.
6. Benefit from your Chapter Executive being a part of a supportive team.
7. Implement an elevated experience for your members by aligning recruitment and retention efforts.
8. Develop a compelling value proposition that combines the best of national and your chapter.
9. Be a part of the solution.
10. Help make FPA’s Primary Aim a reality: *To elevate the profession that transforms lives through the power of financial planning.*