WHY To ensure FPA's viability, strength, impact and relevance for current and future members and volunteers.

WHAT A transformative reorganization that unites FPA and its communities through greater alignment and integration.

HOW By dramatically increasing leadership participation in FPA and robustly beta-testing coordination and collaboration of key functions.

OneFPA Network: *Background and Intent*

FPA is a vibrant association with more than 2,000 passionate volunteer leaders working to deliver value to members while shaping the financial planning profession in the spirit of our Primary Aim: *To elevate the profession that transforms lives through the power of financial planning.* And while FPA offers a robust set of services and programs nationally and through our network of 88 chapters and state councils, there are landscape issues for national voluntary professional membership associations that FPA must proactively address to ensure it is strongly positioned to fulfill its Primary Aim for current and future generations of financial planners.

The reality is that the landscape has changed so much in recent years that FPA has to change with it. A technology-driven economy, competition from the non-profit _and_ for-profit sectors, and the rapidly changing demographics of potential members—not to mention the increased business diversity of our membership base—are critical issues that FPA, and all voluntary membership associations, must address.

The OneFPA Network draft plan is a complete reorganization of the entire FPA enterprise that allows all key functional areas to work more closely together while simultaneously institutionalizing a process to include more chapter leader input into the strategic direction-setting of FPA. Given the landscape issues we face, we believe this a worthwhile and necessary endeavor.

OneFPA Network: *Gathering the Input to Inform Our Path Forward*

The OneFPA Network vision and draft plan was formally introduced in November 2018. Since that time, through a nationwide Listening Tour and 45-day comment period, countless stakeholders provided input that has been instrumental in shaping the Final OneFPA Network Plan. From November 2018 through July 1, 2019:

We **listened** to our stakeholders' feedback.
- All chapters were contacted to arrange a listening tour meeting.
- 90% of FPA chapters participated.
- Additional meetings were held with chapter executives, members, corporate partners, past FPA presidents, NexGen leaders and other stakeholder groups.

We **learned** what changes our stakeholders wanted to see reflected in the plan.
- Stakeholders are seeking a greater voice in the association.
- Chapter autonomy is paramount.
- Better technology is required.
- Institutionalizing a higher level of collaboration and cooperation among FPA and its communities is needed.

We **adapted** the plan to incorporate feedback while maintaining the intent behind the OneFPA Network vision.
- The OneFPA Transition Task Force carefully reviewed all input and recommended substantive adjustments to the plan.
- Through an additional 45-day comment period of a Second Iteration of the OneFPA Network Draft Plan, the OneFPA Transition Task Force continued to refine the plan.
- The Board of Directors approved the Final OneFPA Network Plan after it was developed by the OneFPA Transition Task Force after synthesizing all stakeholder feedback.

OneFPA Network: *Final OneFPA Network Plan*

The Final OneFPA Network Plan, introduced on July 11, 2019, accounts for the stakeholder feedback collected on the original draft plan and the Second Iteration of the OneFPA Network Draft Plan, but still represents a transformational change on strategic, operational and cultural levels. The plan is divided into three key areas that serve as the pillars of the OneFPA Network:

1. **The Structure of Participatory Governance:** To institutionalize contributions from more FPA leaders in shaping the present and future of FPA, constitute the OneFPA Advisory Council and OneFPA Advisory Council Executive Committee in 2019 and the OneFPA Nominating Committee in 2020.

2. **Beta-Testing Centralized Functionality:** Create a significant and comprehensive beta-test with up to 10 chapters that will participate in the centralization of technology, accounting/finance and staffing functions.

3. **Commitments and Agreements:** Amend appropriate governance documents to reflect the principles of participatory governance and create a Master Services Agreement as an addendum to the Affiliation Agreement for beta-test chapters that outlines the responsibilities of, and commitment to, beta-test chapters.

OneFPA Network: *What's Next?*

July 11, 2019	• The Final OneFPA Network Plan and accompanying documentation unveiled, and beta-test chapter applications distributed, after review and approval by the Board of Directors.
July 11 – Sept. 30, 2019	• Design, inform, populate and implement new participatory governance structures including OneFPA Advisory Council.
Sept. 15, 2019	• Beta-test applications are due to the OneFPA Transition Task Force.
Sept. 18, 2019	• Chapters designate OneFPA Advisory Council representatives.
Late Sept. 2019	• Virtual orientation meeting for OneFPA Advisory Council.
Oct. 15, 2019	• OneFPA Transition Task Force selects beta-test chapters.
Oct. 15 – Dec. 31, 2019	• Ongoing collaboration and development with beta-test chapters, including development of goals and success measures.
Nov. 15-17, 2019	• First in-person meeting of the OneFPA Advisory Council at the Chapter Leaders Conference.
Jan. 2020	• Centralized accounting and centralized staffing operationalized for beta-test chapters.