



Frequently Asked Questions



OneFPA Network Overview

Learn about the OneFPA Network and how the vision will support volunteer leaders, communities and members.

Centralized Technology

Learn how the OneFPA Network will provide integrated technology to support communities.

Centralized Accounting/ Finances

Learn how the OneFPA Network will position the association to leverage greater buying power and streamlined operations to support communities and members.

Centralized Staffing

Learn how the OneFPA Network will harness the power of an integrated staffing model to support communities.



OneFPA Network Overview

What is the intent of the OneFPA Network?

The intent of the OneFPA Network is to increase alignment and integration within FPA to better leverage human and financial resources, improve communications, elevate FPA's relevance and enhance the member experience. Exploring the OneFPA Network possibilities began several years ago when chapter leaders approached FPA with concerns about the chapter system. While assessing the current situation and anticipating the challenges that volunteer associations like FPA will face in the future, the OneFPA Network emerged as the best path forward.

Is transformational change needed?

Over the years, we have made incremental changes to the chapter system but have not gained substantial benefit in efficiencies and enhancements in the member experience. National and local leaders who have been assessing the dynamic challenges facing FPA determined that transformational changes—not incremental changes—in how FPA operates and is structured are needed. The OneFPA Network goal is to determine how to best leverage over 2,000 volunteer leaders, 89 legal entities, over 100 national and local staff, and limited financial resources to create an exceptional member experience in a highly competitive and crowded landscape.

What are the foundational principles of the OneFPA Network?

To create more alignment and integration, there are two foundational principles that the OneFPA Network is based on—Participatory Governance and Centralized Functionality.

What is participatory governance?

Participatory governance means exploring structural changes that invite more leaders, especially chapter leaders, to be involved in the strategic direction setting of FPA on a macro level and working out the details of centralized functionality on a micro level. While it may seem complicated to involve more leaders in discussions and decision-making, we believe that FPA will always be stronger when more voices are heard and more leaders are engaged in accomplishing FPA's Primary Aim.

What is centralized functionality?

FPA is comprised of 89 legally incorporated entities (one national organization, 86 chapters, two state councils), and a host of other communities. While the individuality, culture and autonomy of these communities must be honored to support the importance of diversity, we believe that there is also great power in unifying several key aspects/elements in FPA to gain efficiencies and effectiveness. The key areas of centralized functionality that are being explored in the OneFPA Network are: Technology; Accounting/Finance; and Staffing. While centralized functionality creates opportunities for greater alignment and integration, chapters will determine and control their budgets, programs, local leadership and continue to direct the responsibilities of their chapter executives.

What about the specific details?

Through the work of several key OneFPA task forces and committees that will be comprised of equal representation from chapter and national leaders, the specific details of how these centralized areas will function will be discussed and determined. To start, a lot of information will have to be gathered, shared and assessed about current operations before any decisions are made. Once the information is gathered and after initial recommendations are made, there will be ongoing testing and assessments, including benchmarking and tracking key metrics to determine how well the new systems are operating and whether adjustments need to be made. Because of the OneFPA Network's commitment to participatory governance, chapter leaders will be involved in the development, implementation and assessment processes every step of the way.

When and how will the OneFPA Network happen?

The OneFPA Network concept is being unveiled at CLC with a corresponding launch of a microsite that will house all the OneFPA Network information and provide opportunities for feedback. Also, there will be opportunities for feedback at CLC and afterwards as FPA leaders engage in a three-month listening tour that will involve connecting with every chapter board, virtually or in-person. Feedback during the listening tour will result in potential adjustments to the OneFPA Network with a final recommendation presented to the Board of Directors in March 2019. The final proposal will include resource assessments and timing recommendations with respect to when and how each aspect of the OneFPA Network should unfold. While we work together on the OneFPA Network specifics in 2019, the intent is for chapters and other FPA communities to continue to operate as usual in 2019 as we prepare for changes in 2020.



OneFPA Network Overview

Will an analysis be provided that clearly shows the member experience has been enhanced under the new construct?

There is no reason to move to the OneFPA Network model if we can't demonstrate improvements in critical organizational areas, including the elevation of the member experience. A set of robust measures will be established to test and learn from the implementation of the OneFPA Network model. Baselines will need to be established first after current information is received from chapters. Also, all OneFPA committees will be required to establish metrics to measure the success of their committee's charge.

What if this doesn't work?

As a learning organization, FPA is committed to initiating transformational change in service of our members and the financial planning profession, which means we will adjust as we learn from direct experience. Many leaders—national and local—were involved in the creation of the OneFPA Network and many will be involved every step of the way. Nothing is being implemented without careful consideration and some things may change after experience and careful review.

What are the contingency plans and are we okay with losing chapters/members?

Adjustments and "contingency plans" depend on what we learn and experience during and after OneFPA Network implementation. One of the primary goals of the OneFPA Network is to increase the recruitment and retention of members, but as with any transformational change, short-term challenges will be faced. It is how we come together as a single, extraordinary organization to address those challenges that will be important.

Why are you using the name "TNC" instead of "chapter"?

The term "TNC" (The New Chapter) is being used as a placeholder name for local geographic communities under the OneFPA Network. Because we are moving to a new system, it's best to select a different moniker to avoid confusion and distinguish the old from the new. While the preference is to not use the term "chapter" to describe local communities under the OneFPA Network, we are open to whatever title makes the most sense. In keeping with a participatory governance approach, local volunteer leaders and staff will be encouraged to share their sentiment on this issue.

Why must we get rid of local legal entities?

Legal entities at the local level add a layer of legal responsibility and bureaucracy that is not necessary. Local entities, without being legally incorporated, can operate just as they do right now with the same leadership titles, programmatic responsibilities and legal protections.

Does FPA have the resources and staff to manage the transition?

The implementation of the OneFPA Network will require careful budget planning and phasing. FPA does not have the staff currently to manage the full implementation of the OneFPA Network, but through business and budget planning in 2019, a timeline will be established with budget and staffing implications. The goals of the OneFPA Network include greater efficiency and effectiveness, which will result in savings in some areas and expansion in other areas, but all geared toward improving the member experience.

Will there still be a board of directors, like now, for each TNC?

Yes, while the legal entity will be dissolved, each TNC will continue to have a volunteer board and leadership positions and a leadership ladder, like the ones that currently exist. TNCs will continue to select their leaders.

Will all chapters be converted to TNCs or will some chapters not be converted to TNCs and new ones created?

There is no plan to add or remove TNCs. We expect through the experience with the OneFPA Network, there may be changes to local TNCs, but when that happens and where that happens is impossible to determine now. The bottom line is that we want to encourage and support strong TNCs that enhance the member experience and the strategic success of FPA.

My chapter is very successful, will we have to transition to the new system?

Every chapter will have to transition to the new system. While some chapters are highly successful, and others struggle, unless all chapters move to the new system, there is no way to truly create a consistent FPA member experience where every member and every local community benefits. Eventually, even a successful chapter will face challenges or not reach its potential if the whole of FPA is not elevated.



OneFPA Network Overview

How is a participatory governance structure different from the current governance structure?

Under participatory governance, there is a robust democratization of leadership participation with more local leaders involved, which is vastly different than the current system. Under the current system, while chapter leaders are chosen to participate in many national governance groups, it is not a formalized process that guarantees inclusion.

What control will TNCs have over their activities?

TNCs will maintain their local culture through the ongoing development and oversight of local programs and services including the creation of their annual business plans and budgets.

How many members will the OneFPA Council have and will it be too large and unwieldy, especially with rotating volunteer leaders?

The Council will be comprised of a representative from each TNC and other leaders who represent other key communities within FPA (e.g. NexGen). The Council may initially have between 90 to 100 members. The purpose of the Council is to act as a strategic sounding board and provide feedback at a high level, so the size of the Council will not be an issue. OneFPA Council members will populate committees and task forces and that's where more detailed analysis and decision-making will occur. To ensure a smooth leadership transition from one year to the next, TNC chair-elects will participate in the last meeting of the OneFPA Council each year.

Is there a potential power dynamic or confusion of authority between the FPA Board of Directors and the OneFPA Council?

Under the OneFPA Network, the FPA Board of Directors is still the fiduciary body that is legally charged with overseeing the organization, so there is no confusion of authority. The OneFPA Council provides overall strategic input, populates key committees and task forces, and has equal representation on the nominating committee, which selects the slate of national Board members.

Will members choose which FPA TNC they belong to or will they be assigned? Can I participate in more than one TNC in my state as a member?

There is no plan to change from the current system. Of course, as the OneFPA Network and the OneFPA committees get to work, all policies will be examined for effectiveness and delivery of the best member experience.

What if my chapter decides not to join national?

Chapters are not joining national, they are further integrating with FPA within the OneFPA Network. As part of this transition, each chapter will become a TNC according to the Governance Manual which will include clear policies and procedures between FPA headquarters, TNCs and other FPA communities. If a chapter decides not to integrate and follow the Governance Manual, they will no longer exist as an FPA-affiliated community and will not have FPA members.

How are we going to measure whether this initiative is successful and, specifically, how are we going to ensure that centralized functionality is operating optimally?

All OneFPA committees and task forces will be charged with developing a set of metrics to measure success. Additionally, as part of the OneFPA Resource Coordination Committee's charge, there will be baseline protocols and metrics for each TNC to implement to help TNCs measure their progress.



Centralized Accounting/Finances

Why should money be centralized?

By integrating finances, the sum of FPA will be greater than the independent parts. The consequence of combining resources is the elevation of FPA's influence in the landscape, FPA's relevance to members, and the opportunity to realize greater buying power to support our communities and members. Importantly, local communities will still have authority over their budgets and manage their resources on a day-to-day basis. The OneFPA Resource Coordination Committee will optimize support to help TNCs determine the most effective ways to develop and manage their budgets.

What's the specific dollar amount of the dues that will be distributed to TNCs?

Relevant OneFPA committees and the Board of Directors will explore and answer what to do about dues and local assessments, including if there will be the same dues amounts across all TNCs, if TNC assessments are allowed and, if so, for what, and what portion of dues is allocated to TNCs. Ultimately, the OneFPA leadership, in the spirit of participatory governance, will have to assess and determine what is in the best interest of FPA that provides the best experience for members. It will be one of the core issues that will be addressed over the next two years.

What happens to annual TNC surpluses?

All current and future reserves (FPA national and TNCs) will be pooled in one accounting system. They will be labeled in different accounts so that TNCs will have direct control over all their reserves.

Will all FPA communities, not just TNCs, have annual budgets?

All FPA communities will be responsible for developing a business plan and submitting a budget in coordination with the OneFPA Resource Coordination Committee.

Are reserves the same as operating accounts?

They are different. Operating accounts deal with the ongoing day-to-day operations of FPA communities. Reserves come under investment policy guidelines to ensure the current and future financial well-being of FPA and its communities.

How will strategic partnership dollars trickle up or down to TNCs?

Under the OneFPA Network, the intention is to coordinate and leverage the potential of FPA's strategic partnerships, financially and otherwise. All FPA communities have a role to play in sponsorships and partnerships. Specifically, as it relates to TNCs, they will work with the OneFPA Strategic Partnerships Committee on national sponsorships and have a key role with respect to local sponsorships. TNCs should have the freedom and authority to enhance local relationships while coordinating more nationally based relationships. The OneFPA Strategic Partnerships Committee will assess and recommend the most effective approach to the strategic partnerships and how the monies get distributed.

Integrating accounting and operations under one system sounds good, but it also sounds very complex and do we have the skill and resources to make it happen effectively?

Other organizations that are as or more complex than FPA have created the same type of centralized accounting and operational system with satellite entities/offices. We have searched for the right partner to support this important aspect of the OneFPA Network and have secured the services of RSM (rsmus.com) to help us assess and design a system that will meet the operational vision of the OneFPA Network. RSM will engage in conversations with chapter leaders and executives in the assessment, design and testing of a new OneFPA Network centralized system.

What happens to my chapter's money?

Through participatory governance, the Board of Directors and all OneFPA committees, which have significant representation by TNC leaders, oversee FPA's financial system and policies. All FPA money, including FPA national money, will be housed in one bank account under one accounting system. TNC finances (operations and reserves) will be accounted for by each TNC. TNCs will have control over their existing finances, existing reserves and future reserves.

Do TNCs get to keep the revenue their events generate?

Yes, TNCs will keep revenue generated by local events. These revenues will flow into a single FPA accounting system accounted for by each TNC.



Centralized Accounting/Finances

Will TNCs have the authority to use/spend funds the TNC has locally generated?

TNC leaders have a fiduciary responsibility to both FPA and their TNC. As such, TNC leaders will act responsibly with respect to their reserves, budgets and all protocols that are established now and will be established in the future.

How will TNCs know their budget?

TNCs will develop their own budgets and then work with the OneFPA Resource Coordination Committee for support and budget finalization. TNCs will receive monthly reports and TNC executives will have ongoing access to budget and financial information through a single, integrated accounting system.

When does this new budget process go into effect?

It's anticipated that the process to develop budgets for 2020 will begin mid-year 2019.

Will TNCs and state councils be dis-incentivized to generate money if they don't have control?

Headquarters and TNCs will be pooling their finances so that it is everyone's money that lifts the whole of FPA. Both national and TNCs will have to see the benefit of contributing their efforts to the benefit of their local communities AND the whole organization. Under the OneFPA Network, there are still separate component parts, but all communities are part of FPA. The incentive is still present if leaders can embrace that the sum of OneFPA is greater than its parts. Also, baselines and metrics will be established so that TNCs will be able to benchmark and measure their success with a greater understanding of the benchmarks and measures of other TNCs.

How will local and regional financial constraints be considered when determining budgets?

Since TNCs develop their own budgets, local cultural, strategic and operational differences will be considered.

What happens if a TNC "overspends" in any given fiscal year? What are the consequences, if any?

The OneFPA Network is designed to be instructive and supportive – not punitive. If a TNC is struggling to meet its financial obligations, the OneFPA Resource Coordination Committee will be available to support the financial health of the TNC. Support could include providing enhanced expertise, tapping into TNC or FPA reserves, or other options, depending on the situation.

Centralized Technology

Why is having one technology platform so important?

We live in a digital age where messaging, content integration, community and every aspect of FPA is delivered at some level through technology. Without a unified technology approach, the ability to elevate the member experience is severely hampered. An integrated technology platform will give us a fuller picture about our members, allowing us to create programs and services that drive value in membership. It also supports a consistent member experience.

Do we have the expertise and resources to integrate our technical needs across FPA communities, including our digital assets like websites?

Other associations with many communities, geographic and otherwise, integrate their digital assets. It requires the right kind of assessment and expertise to do the job well. We have secured the services of DelCor (delcor.com) to help support us in designing an aligned and integrated technology solution. DelCor provides technology solutions and has completed extensive work with many associations similar to what FPA will require. DelCor will be working with the OneFPA Technology Task Force and other committees to assess needs, then design, test and implement a technology solution that meets the OneFPA Network vision.



Centralized Staffing

Why should all staff, national and local, be FPA employees or independent contractors of FPA?

In volunteer driven organizations, staff is a critical component of creating an effective system that counter-balances the limited and transitory time of volunteer leaders. Without all staff becoming employees or independent contractors of FPA, there will not be sufficient integration and alignment of all the strategic and operational components of the entire system. Also, having all staff be FPA employees will help shift the “us” versus “them” culture to a more collaborative “we” culture.

Does the role of local staff change under the OneFPA Network?

The fundamental role of local staff under the OneFPA Network model remains the same and that is to be dedicated and in service to the local board and the local community. That means local staff is completely vested in local community success while being deeply connected to resources and support from all corners of FPA.

Do we get to keep our current chapter executive and oversee the chapter executive’s role, compensation and performance?

There are no plans to remove or change chapter executives when the transition occurs to the OneFPA Network. The OneFPA Network is intended to support the work of TNC executives and enhance their ability to serve their local TNCs. The compensation of TNC executives is handled by each TNC through their individualized business planning and budget process. Under the new system, while the TNC must submit its business plan and budget for review by the OneFPA Resource Coordination Committee, this review is not an approval process but rather intended to provide another level of expertise and support. Since TNC executives must serve the needs of their TNCs, TNC leaders will have the primary role in the performance evaluation and hiring processes, which will include determining local staff responsibilities. TNCs will have significant input in evaluating staff as part of a coordinated annual review process.

Must chapter executives become FPA staff and will they be designated as employees or independent contractors?

Current chapter staff must become FPA staff. The existing chapter executive designation as an “employee” or “independent contractor” will be transitioned to the same designation under the OneFPA Network unless legal considerations require a shift.

How will FPA “national” staff integrate with “TNC” staff?

Through in-person and virtual meetings, and the resources and training available through the Leadership Institute, all FPA staff, whether they are local or national, will be involved in regular strategic, administrative and cultural orientations, sharing of best practices and content-driven meetings. In this way, all staff will become part of a larger team, more familiar with each other and the resources available through FPA.

Have a question not addressed here?

Visit www.OneFPANetwork.org or email OneFPANetwork@OneFPA.org