



Meeting of the **OneFPA Advisory Council**

THURSDAY, NOVEMBER 20, 2025

Welcome and Thank You!

Lance Eaton, CFP®
Chair, 2025 FPA Advisory Council



FPA Board Update

Dan Galli, CFP®
2025 FPA President-elect



Introducing

Crystal Alford-Cooper, CFP®
2026 FPA President-elect



2026 Advisory Council Representative Designation Update

2026 Council Designations Update

CHAPTER DESIGNATIONS	NEXGEN DESIGNATIONS	DEI COMMITTEE DESIGNATIONS
Confirmed: Chapters: 45 Councils: 0	Confirmed: NexGen: 3	Confirmed: DEI: 1
Not Confirmed: Chapters: 28 Councils: 2	Not Confirmed: NexGen: 0	Not Confirmed: DEI: 2

**As of Nov. 10, 2025*

*Designate Your
2026 Rep!*



2026 Advisory Council

Executive Committee

2026 Advisory Council Executive Committee

- Lance Eaton, FPA of Illinois (Large Chapter Rep): 2026 Chair
- Aaron Clarke, FPA of the National Capital Area (Large Chapter Rep)
- Open (Large Chapter Rep) ←
- Thomas Schaffer, FPA of the Triangle (Medium Chapter Rep)
- Stacy McGinty, FPA of South Florida (Medium Chapter Rep)
- Pattye Zeto, FPA of Ventura County (Small Chapter Rep)
- Deshawn Peterson, FPA NexGen (NexGen Rep)
- James Serrano, FPA DEI Committee (DEI Rep)
- Crystal Alford-Cooper, 2026 FPA President-elect (Board Liaison)
- Ben Lewis, FPA Chief Communications Officer (Staff Liaison)

**Reach out if
interested!**

2025 Planning Recap

Setting Up the Council for Success in 2026

Strengthening the Connection: The FPA Board and the Advisory Council

- The Council wants more intentional, predictable, and two-way dialogue that leads to stronger collaboration and more meaningful engagement.
- The ACEC developed a new communications plan designed to create a consistent rhythm of connection and shared purpose.
- To be implemented in 2026, the plan lays out a structured calendar of touchpoints, blending live discussions, written updates, and interactive sessions.
- At its core, the plan is about closing the loop. Every meeting, update, and report is followed by a response, ensuring that the flow of information is not one-way but a true exchange.

Advisory Council: 2025 One-Page Strategic Plan

FPA Advisory Council: 2025 One-Page Strategic Plan

Theme: Enhancing Engagement, Strengthening Chapters, and Driving Impact

The FPA Advisory Council will serve as the vital connection between FPA and local chapters, ensuring that engagement is strengthened, resources are maximized, and communication is effective. This plan aligns the Council's efforts with the FPA Strategic Plan, making the Advisory Council a key driver of chapter success and national progress in 2025.

Strategic Focus	Key 2025 Actions	Alignment with FPA Strategic Plan	Success Metrics (KPIs)
Clarify the Role and Accountability of Advisory Council Representatives ACEC Leads: - James S. - Patty	- Define clear expectations for representatives, including responsibilities and reporting structure. - Develop guidance and recommendations for each chapter to appoint a representative and implement structured onboarding. - Create an accountability system to track participation and engagement.	Strengthens FPA's networking and engagement by ensuring stronger chapter connections and deeper collaboration between FPA and chapters.	90%+ chapters have a designated Advisory Council representative. - Increased follow-through on commitments from representatives.
Improve Communication and Information Flow ACEC Leads: - Aaron - Dan	- Establish a structured two-way communication process between FPA, the Advisory Council, and chapters. - Develop a quarterly engagement report summarizing key Council updates, successes, resources, and best practices. - Standardize meeting agendas and summaries with clear action items for follow-up.	Enhances awareness of chapters to stay informed and aligned with national efforts.	80%+ of representatives actively engage with chapter boards. 100% of meetings result in clear action steps and follow-up.
Increase Chapter Support and Resource Utilization ACEC Leads: Thomas	- Provide a role-specific guide for Advisory Council reps on how to maximize their impact. - Increase visibility of FPA benefits and resources to representatives through impactful communication. - Adopt a regular communication schedule with clear asks of Council representatives for them to engage their respective chapters.	Empowers Advisory Council representatives to be effective liaisons and advances FPA's mission.	80%+ of representatives actively engage with their chapters. 10% improvement in chapter satisfaction scores related to awareness and engagement.
Enhance Engagement and Participation ACEC Leads: - Stacy - Deshawn	- Improve Advisory Council meeting structure with pre-set agendas, key discussion topics, and action-driven breakout groups. - Schedule periodic regional chapter collaboration calls to improve idea-sharing and problem-solving. - Implement an engagement tracking system to monitor representative involvement and effectiveness.	Reinforces FPA's community-building and networking initiatives, strengthening collaboration among chapters.	75%+ attendance at Advisory Council meetings. - Increased chapter-to-chapter collaboration and resource-sharing.
Measure and Drive Impact ACEC Leads: - Lance - Ben	- Implement KPI tracking for chapter engagement and Advisory Council effectiveness. - Establish quarterly check-ins and action-based reporting for representatives. - Define a process for collecting and integrating chapter feedback into national initiatives.	Supports FPA's mission to be the leading membership organization by ensuring engagement and responsiveness.	Quarterly impact reports shared with the Council and FPA leadership.

- The Council meeting notes were distilled down into five core areas that must be addressed in 2025.
- Each core area has an identified set of actions, how it aligns to the FPA Strategic Plan, and potential KPIs.
- The five core areas:
 1. Clarify the Role and Accountability of Representatives
 2. Improve Communication and Information Flow
 3. Increase Chapter Support and Resource Utilization
 4. Enhance Engagement and Participation
 5. Measure and Drive Impact

The Plan: This Is What You Asked For!

1

Regular, Predictable Updates: Quarterly email communications and video messages from the ACEC Chair keep Council members in the loop on priorities, meeting outcomes, and key “asks.”

2

Interactive Town Halls: The Board and Council will come together multiple times each year, both in person and virtually, to discuss pressing issues, share updates, and gather input.

3

Board Acknowledgement: The Board will be proactive in acknowledging input and will outline next steps, reinforcing that Council perspectives are heard and acted upon.

4

Early Planning and Transparency: Annual calendar invitations go out before the year begins, ensuring everyone can plan for participation.

The 2026 Communications Plan

DATE (2026)	CONTENT	FROM	TO	NOTES
Jan 7	Chair's Video Update	ACEC	COUNCIL	Brief welcome to the Council, expectations, plans for the year.
End Jan/ Early Feb	Board/Council Town Hall	BOARD	COUNCIL	As part of CLC, the Board will participate in a town hall with the Council to provide an update, critical issues are presented, and specific "asks" of the Council are made. (NOTE: Explore virtual option for non-attendees)
Mid-Feb	IF NEEDED: Virtual Board / Council Town Hall	BOARD	COUNCIL	If a virtual component at CLC is not possible, the Board will participate in a virtual town hall with Council reps not at CLC to provide an update, critical issues are presented, and specific "asks" of the Council are made.
Mar 5	Council Update (Email)	ACEC	COUNCIL	Chair's message, meeting topics and outcomes, attendance update, member benefits update, best practices, "asks".
Apr 23	Council Meeting	COUNCIL	BOARD/ STAFF	Full meeting of the Advisory Council. Explore issues raised by the Board at the previous town hall. Any operational issues raised by representatives collected and shared with FPA staff.

The 2026 Communications Plan

DATE (2026)	CONTENT	FROM	TO	NOTES
May 14	Post-Meeting Report	COUNCIL	BOARD/ STAFF	Written report based on the notes collected at the previous Council meeting developed to include recommendations and sent to the Board, FPA staff leadership, and Council reps.
May 25	Board Reaction to Post-Meeting Report	BOARD	COUNCIL	It is requested that the Board develop a communication (at the Board's discretion) acknowledging the Council's report, the information contained, and steps to be taken.
Jun 4	Council Update (Email)	ACEC	COUNCIL	Chair's message, meeting topics and outcomes, attendance update, member benefits update, best practices, "asks".
Jul 23	Council Meeting	COUNCIL	BOARD/ STAFF	Full meeting of the Advisory Council. Explore issues raised by the Board at the previous town hall. Any operational issues raised by representatives collected and shared with FPA staff.
Aug 6	Post-Meeting Report	COUNCIL	BOARD/ STAFF	Written report based on the notes collected at the previous Council meeting developed to include recommendations and sent to the Board, FPA staff leadership, and Council reps.

The 2026 Communications Plan

DATE (2026)	CONTENT	FROM	TO	NOTES
Aug 27	Board/Council Town Hall	BOARD	COUNCIL	The Board will participate in a virtual town hall with the Council to provide an update, critical issues are presented, and specific “asks” of the Council are made.
Sep 3	Council Update (Email)	ACEC	COUNCIL	Chair’s message, meeting topics and outcomes, attendance update, member benefits update, best practices, “asks”.
Sep 24	Council Meeting	COUNCIL	BOARD/ STAFF	Full meeting of the Advisory Council. Explore issues raised by the Board at the previous town hall. Any operational issues raised by representatives collected and shared with FPA staff.
Oct 15	Post-Meeting Report	COUNCIL	BOARD/ STAFF	Written report based on the notes collected at the previous Council meeting developed to include recommendations and sent to the Board, FPA staff leadership, and Council reps.
Oct 26	Board Reaction to Post-Meeting Report	BOARD	COUNCIL	It is requested that the Board develop a communication (at the Board’s discretion) acknowledging the Council’s report, the information contained, and steps to be taken.

The 2026 Communications Plan

DATE (2026)	CONTENT	FROM	TO	NOTES
Nov 5	Council Update (Email)	ACEC	COUNCIL	Chair's message, meeting topics and outcomes, attendance update, member benefits update.
Dec 3	Council Meeting	COUNCIL	BOARD/ STAFF	Full meeting of the Advisory Council. Explore issues raised by the Board at the previous town hall. Any operational issues raised by representatives collected and shared with FPA staff.
Dec 17	Post-Meeting Report	COUNCIL	BOARD/ STAFF	Written report based on the notes collected at the previous Council meeting developed to include recommendations and sent to the Board, FPA staff leadership, and Council reps.
Dec 21	Chair's Video Update	ACEC	COUNCIL	Year in Review: Update from the ACEC, recap of the year, what you need to know, next steps

ACEC Responsibilities



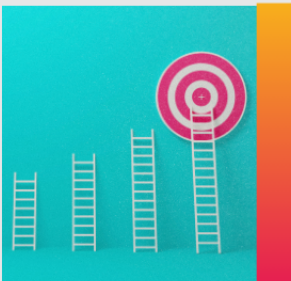
Lead and Align

- Serve as the strategic connector between the Board, staff, and Council.
- Keep discussions and initiatives tied to FPA's long-term vision.
- Ensure consistency and transparency in all ACEC communications.



Engage and Support

- Initiate every touchpoint outlined in the 2026 Communications Plan.
- Provide representatives with timely materials and clear "asks".
- Encourage chapter and community feedback loops to surface emerging needs.



Measure and Evolve

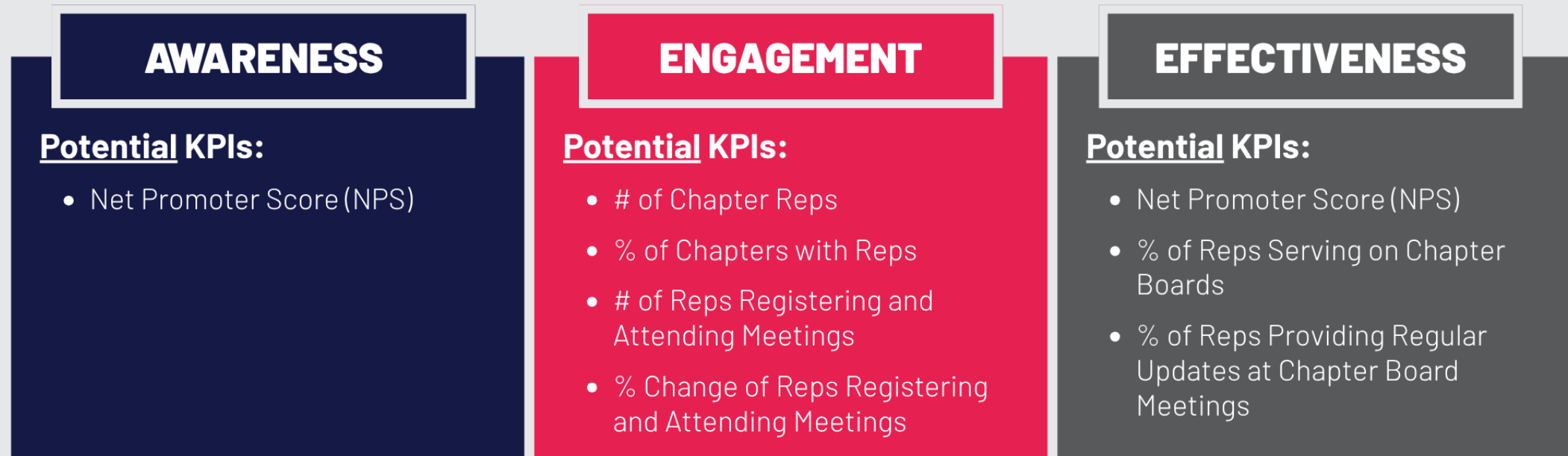
- Track participation, responsiveness, and implementation of recommendations.
- Share updates and data to demonstrate progress.
- Conduct an end-of-year reflection to refine strategies for 2027.

Council Representatives Responsibilities

BE AN ACTIVE VOICE	COMMUNICATE AND CONNECT
• Represent your chapter, NexGen, or committee with authenticity. Bring your perspectives, ideas, and needs. • Participate fully in meetings, town halls, and discussions; attendance and preparation matter. • Provide timely feedback and insights when “asks” are made by the ACEC or Board.	• Serve as a communication bridge: share Council updates, resources, and decisions with your chapter or community. • Gather local input before each meeting to ensure representation is informed and inclusive. • Close the loop and report back on how national initiatives and conversations translate locally.
COLLABORATE FOR IMPACT	BRING YOUR VALUES
• Work with fellow representatives to identify shared challenges and propose solutions. • Contribute to working groups or task forces when opportunities arise. • Support data collection and follow-up on KPIs related to participation, resource use, or member engagement.	• Approach your role with professionalism, respect, and a collaborative spirit. • Be a champion for inclusion, transparency, and continuous improvement within your community and the Council. • Lead by example because your engagement sets the tone for others.

Measuring the Council's Impact

- The ACEC is working on a plan to provide ongoing reporting on Key Performance Indicators (KPIs) in 2026 in three areas: awareness, engagement, and effectiveness.



- Final KPI plan to be developed before the end of 2025.

A couple of questions for you:

For the town hall at FPA LEAD 2026 (formerly known as the FPA Chapter Leaders Conference), what are some issues/topics you want the Board to address?

What can we do to better support representatives in 2026?



Thank You!