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## FPA Unveils Final OneFPA Network Plan

***OneFPA Advisory Council to be formed in September and all chapters can apply to participate in two-year beta-test beginning January 2020***

DENVER (July 11, 2019) – The Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals and those who support the financial planning process, today announced the Final OneFPA Network Plan designed to advance a shared vision that ensures FPA's viability, strength, impact and relevance. The Final Plan is the result of six years of conversations and analysis and incorporates input from a robust feedback process that included a four-month nationwide Listening Tour and additional 45-day comment period.

"The Final OneFPA Network Plan is the culmination of a multi-year journey, and we are proud to unveil it as the next step in the ongoing elevation of FPA and the profession of financial planning," said 2019 FPA President Evelyn Zohlen, CFP®. "We received invaluable input from countless stakeholders that was instrumental in adopting a final plan that is responsive, collaborative and visionary. We appreciate everyone who shared their views and input. The Final OneFPA Network Plan underscores the power of participatory governance, which is one of the OneFPA Network's key tenets."

The Final OneFPA Network Plan is largely consistent with the Second Iteration of the plan, which was introduced in April 2019, but with additional clarifications and details. The Final Plan continues to embrace two original OneFPA Network pillars: participatory governance and centralized functionality. In addition, the Final Plan clarifies that:

- Chapters will continue to play a critical role in the strategic direction setting of the association through 'participatory governance,' and the creation of a OneFPA Advisory Council to be formed in September 2019.
- A beta-test of centralized functionality with 10 volunteer chapters will begin January 2020 with applications due September 15, 2019.
- Chapters will not be required to dissolve their separately incorporated legal entities and any future consideration will be deferred until after the beta-test when a more thorough analysis can be completed.

- Chapters will continue to control budgets and reserves, raise and control sponsorship revenue, develop local programming as they desire, determine local leadership and governance, and direct/oversee the work of their local staff, according to a Master Services Agreement for chapters participating in the beta-test.

“We look forward to thoughtfully implementing the OneFPA Network vision in collaboration with our chapters,” said FPA Executive Director and CEO Lauren M. Schadle, CAE. “Chapter participation and input will help us effectively analyze and fully understand how our centralized functionality provisions may be extended across our chapter system in the future to achieve greater alignment and integration FPA-wide.”

All FPA chapters are encouraged to apply to participate in a two-year beta-test of the centralized functionality provisions (technology, accounting/ finance, and staffing) beginning in January 2020. Applications to participate are due September 15 and beta-test chapters will be selected by the OneFPA Transition Task Force on October 15. FPA and beta-test chapters will work together through the fall to finalize logistics in advance of the beta-test beginning January 2020.

Strategic Goals and Key Performance Indicators (KPIs) will enable FPA, beta-test chapters, and all stakeholders to determine the efficacy of the centralized functionality provisions that are part of the beta-test. Ongoing reporting on beta-test measurement, based on the KPIs, will be provided to all stakeholders throughout the process.

“An ever-increasing technologically-driven economy, increasing competition from the non-profit and for-profit sectors, rapidly changing demographics and business models of current and potential members, demand on the time and attention of volunteer leaders and members are just a few of the challenges that must be addressed to ensure FPA’s continued viability, strength, impact and relevance. We believe the OneFPA Network vision is the right approach to help secure the association’s future and will make FPA the strongest association possible for our current and future members,” added Schadle.

Visit [www.OneFPANetwork.org](http://www.OneFPANetwork.org) for more information.

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### **About the Financial Planning Association**

The Financial Planning Association® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning. Through a collaborative effort to provide members with tools and resources for professional education, business support, advocacy and community, FPA is the indispensable resource in the advancement of today's CFP® professional. Learn more about FPA at [www.OneFPA.org](http://www.OneFPA.org) and follow on Twitter at [twitter.com/fpassociation](https://twitter.com/fpassociation).