



APTi Chapter Formation and Operations Guide

Introduction

The Association for Psychological Type International (APTi) welcomes you to the wide and growing community of persons interested in psychological type. We know that as individuals realize the power of type, they want to find like-minded individuals to share their interest. We understand this interest and encourage you to start a chapter!

Local APTi chapters and the APT eChapter are important vehicles for:

- Fostering the study and understanding of psychological type
- Promoting the appropriate and ethical use of psychological type
- Providing a regular forum for members to explore type theory and “talk type”
- Sharing type applications and research

The task of developing a chapter may seem daunting at first, but it’s pretty simple. The Chapter Development Council (CDC) [formerly the Regions and Chapters Development Committee (RCDC)] and APTi’s executive office have developed this *Chapter Formation and Operations Guide* to help you establish and maintain a thriving chapter. In addition to this guide, your CDC and the APTi staff, you will find valuable resources on APTi’s website at www.apptinternational.org including APTi’s mission, bylaws and ethical principles, committees and interest areas, and staff and volunteer leaders’ contact information.

Contents

Benefits of Achieving Chapter Status	3
Summary of Chapter Requirements	4
Becoming a Chapter	5
Form Chapter Structure	5
Select Leaders	5
Determine a Chapter Name	5
Create Chapter Objectives	5
Write Chapter Bylaws	6
Define Membership Policies and Fees	6
Establishing Sound Financial Procedures	7
Manage and Track Chapter Expenses	7
Financial Management Practices and Internal Controls	7
Bank Account	8
Insurance	8
Tax Matters	8
Define meeting schedule	8
Application Approval Process	9
Submit Application	9
APTi Member Verification	9

Executive Committee Review	9
Recognition	9
Chapter Annual Renewal Process.....	9
Operating Your Chapter.....	10
Program Planning	10
Communications	10
Programs and Presenters	11
Steering Committee	12
Changing a Chapter Name.....	12
Continuing Education (CE) Credits Process	12
Financial Matters	13
Merging Chapters.....	13
Closing a Chapter.....	14
Chapter Status	14
Voluntary Dissolution	15
Involuntary Dissolution	15
Dissolution Approval and Chapter Funds	15
Dissolution Disapproval	15
Continued Chapter Activity	15
Website Information	16
APTi Contact Information	16
MBTI® Certification Programs	16
Attachment 1: APTi IRS Tax Exempt Status Letter	17
Attachment 2: Application Form for Chapter Approval.....	18
Attachment 3: APTi Chapter Renewal Cover Letter	19
Attachment 4: 2014 APTi Chapter Agreement.....	21
Attachment 5: 2014 APTi Chapter Financial Information Required	22

Please contact apti.chapter.ldrs@gmail.com for any questions, corrections or changes.

Benefits of Achieving Chapter Status

Recognition as an official APTi chapter confers the benefits, protections, rights, and responsibilities of APTi's corporate status. Thus, APTi chapter status provides important benefits to your chapter and its members that are not available to unaffiliated type-talk groups. Some of these are:

- As a 501(c)(3) not-for-profit corporation, APTi is ***exempt from the requirement to pay federal income taxes***, as are APTi chapters. Chapter financial information is included in APTi's annual report to the IRS. You won't have to file your own federal tax reports, obtain your own non-profit status, or worry about being investigated for non-compliance with federal tax-codes.
- Your chapter has ***general liability insurance coverage*** for chapter-sponsored events and your Board of Directors.
- Use APTi's non-profit corporate status and ID number to ***open Chapter bank accounts, apply for sales tax exemption*** in your own state, and other related benefits.
- As a APTi chapter, you may also ***receive charitable contributions (other than dues or fees) that are tax-deductible*** and ***provide receipts to donors*** acknowledging these gifts, to the extent provided by federal law. Soliciting donations for your chapter may require additional, minimal filing with your state. (Note: Dues or fees are not considered charitable contributions.)
- APTi offers and promotes high-value programs for your membership.
- APTi maintains and updates ***chapter information, program schedule, and chapter links on the APTi website***.
- Apply to offer Continuing Education (CE) credits from APA, NBCC and the MBTI® Master Practitioner Program through APTi for qualified chapter-sponsored workshops, seminars and conference.
- Request that ***Continuing Education (CE) credits be coordinated*** when offered at conferences.
- ***Include Chapter Members*** in broadcast emails of general interest, as allowed by APTi Membership policy. As of August 2014, all chapter members are considered to be APTi Basic Members, and the Chapter will be assessed an administrative fee of \$12/Chapter Member/year.
- Receive ***APTi member lists*** for your geographical area to use in promoting chapter activities, including email addresses, when these are available.
- Take advantage of ***ethical type guidelines*** currently being made available on the APTi website.
- Take advantage of optional administrative support for your chapter:
 - ✓ For a nominal fee, chapters may request ***fee processing and/or maintenance of online Chapter membership list***, and other services.
 - ✓ ***Request administrative assistance*** for Chapter administration (fee based).

Summary of Chapter Requirements

In order for APTi to provide services to APTi Chapters, APTi needs the support of the chapters. There are only a few specific requirements to be eligible to be an APTi Chapter:

- Agree to conform to ethical standards for the use of type.
- Every year a chapter must complete and sign the *APTi Chapter Agreement*, and submit all required reports from the prior year, including:
 - ✓ Chapter Financial Statement Form for the prior year
 - ✓ Copies of bank statements from the year, including statements from any investment accounts
 - ✓ Summary of your chapter's programming from the year.
 - ✓ Membership list and optional phone/email contact information as of 12/31 of each reporting year including a list of at least five chapter members, including the President and Treasurer, who must be professional/full APTi members.
 - ✓ Payment for APTi Administration Fee must be received by the reporting deadline.
 - ✓ A copy of Chapter Bylaws is required if changes have been made since the last renewal, or if APTi does not currently have a copy on file.
 - ✓ Copies of the minutes from your Board meetings are not required, but recommended.
- Inform APTi promptly of any changes to chapter leadership (new Presidents and/or Treasurers, in particular) by sending an email to info@aptinternational.org
- Follow IRS rules, for the USA, or Canadian rules for financial reporting for charitable organizations and have your financial records available for inspection on demand.
- Follow the rules for usage for all trademarked materials pertaining to any organizations or instruments, including the MBTI® Instrument. These rules of usage for the MBTI® Instrument have been published in the *CPP, Inc., Trademark Guidelines* which can be obtained from the APTi website or the CPP website at www.cpp.com/pdfs/Trademark_Guidelines.pdf.

This Guide contains many suggestions and recommendations for running a successful chapter, compiled over the years and recently updated. We welcome feedback and suggestions to improve this resource for APTi's Chapters.

Becoming a Chapter

Local APTi chapters provide a regular forum for exploring type theory, sharing applications, as well as continue personal growth and professional development. Chapters serve to channel knowledge, energy and enthusiasm of APTi members in a way that benefits not only individual members, but the entire association. The following sections will walk you through the process of starting a Chapter.

Form Chapter Structure

Select Leaders

Elect or appoint a chapter president and treasurer who are current APTi members. It is required that these chapter officers be members of the Association for the benefits and protections of chapter status to be in effect.

Determine a Chapter Name

A chapter can select any name for itself, which is appropriate to a professional organization. It may indicate, for example, a regional interest, a city or university area, or a state designation. Those chapters electing to identify themselves with a state name designation are neither to assume nor to suggest to others any hierarchy of chapters in the state in which they reside. All chapters within a single state, regardless of the chapter name are equal and can accept members from any geographical area.

If a chapter wishes to incorporate affiliation with the international organization into their chapter name, it can be done in one of two appropriate ways.

1. The chapter can identify as the (Geographical Area) Association for Psychological Type, for example, the Geographical Area Association for Psychological Type, which could be abbreviated “GAAPT.”
2. The chapter can identify as the (Geographical Area) Chapter of the Association for Psychological Type International. The distinction of the second option, is that it would allow for a chapter to use the “i” in any acronym that they may choose, for example, the Geographical Area Chapter of the Association for Psychological Type International, could be abbreviated “GAAPT*i*” or “GACAPT*i*” if they chose the second method of APTi chapter name construction.

Create Chapter Objectives

Write a statement of goals and objectives consistent with APTi bylaws and mission. The main objective of an APTi chapter or a type-talk group should be to promote sharing, understanding, and responsible use of psychological type. Local chapters sometimes begin by providing an opportunity for members to get together and “talk type”. Additional objectives a chapter may want to consider include:

1. Sponsoring workshops or seminars
2. Recruiting additional members
3. Developing activities useful for explaining type
4. Conducting simple research
5. Conducting type-based community education programs
6. Conducting joint programs with other professional associations

Write Chapter Bylaws

Write chapter bylaws that are consistent with APTi Bylaws (available per request from the Main APTi Office). You are encouraged to use the model provided and modify it to suit your chapter's particular needs. Bylaws are an important part of the documentation that establishes a chapter's relationship to the APTi.

Define Membership Policies and Fees

Membership in an APTi chapter is voluntary; all chapters charge additional dues for their own use. As of July 1, 2014, all APTi chapter members are also enrolled as an APTi member at the Basic level. At the time of their joining, they will incur the prevailing administrative fee, as determined by the APTi Board of Directors. As you are launching your chapter, identify and document your membership requirements and fees. Define the geographic area to be served by the Chapter. Compile a membership roster with names, phone numbers, email addresses, and addresses of chapter members, requesting their APTi paid membership status.

NOTE: Each APTi chapter must include *at least* five (5) current paid APTi members among its membership. ***Without meeting this requirement, your chapter cannot be eligible for official affiliation with APTi.*** If, at any time, your chapter's membership falls below five (5) paid APTi members, the Chapter will be given thirty (30) days to correct this count before APTi officially revokes the chapter affiliation.

The APTi staff can supply you with a list of paid APTi members in your area (the membership directory is also available on the APTi website). By contacting these members and others who express an interest in your emerging group, you can recruit the nucleus for a type chapter. In developing membership, you might also consider contacting:

1. Counseling centers
2. School systems
3. Colleges and universities (especially the counseling, business, education, psychology and religion departments)
4. Human resource and organizational development departments of private corporations, hospitals and government agencies
5. Churches and religious organizations
6. Local chapters of other professional organizations
7. Private consultants
8. APTi for names of local people who have attended APTi training programs

There are several common models for funding chapter activities. Some chapters raise funds entirely through hosting special events such as local conferences, seminars and workshops. (This is also a good way to attract new members.) Other chapters rely on a combination of annual dues and program attendance fees, while a third kind of chapter prefers higher annual dues, with all regular program attendance included. Guest fees are usually set for non-members who want to attend events.

Decisions about local dues are made entirely by local leaders. Whatever you choose, you will need to ensure that you collect the prevailing APTi administrative fee for all members who join your chapter.

Establishing Sound Financial Procedures

All chapters must establish, and periodically review, sound procedures for handling chapter funds. At minimum you will need to:

- Appoint or elect a treasurer who is a current APTi member
- Open a bank account (APTi chapters can use the APTi's Federal Employer Identification Number 22-2291442 for this) and authorize appropriate signatories on the account.
- Develop a yearly budget including anticipated revenues (dues, fees, donations) and the associated expenses (i.e. phone calls, online marketing, webinar costs, postage, copying, speakers, refreshments, meeting room charges, etc.)
- Develop a written or computerized system to record and track chapter income and expenses that follows basic accounting practices. Accounts should never be comingled with any individual's account or any other business account.

Manage and Track Chapter Expenses

Create a plan to meet local chapter expenses and establish a local checking account in the name of the chapter. In the beginning, loan money or grants may be available from APTi to finance start-up costs. This money will be dependent on the financial status of the organization. Start-up costs will depend on what activities the group initially undertakes. Typical early expenses are for copying, envelopes, postage, meeting refreshments, and perhaps meeting space. Later expenses may include website and shopping cart-related items.

Financial Management Practices and Internal Controls

A few simple practices are recommended to ensure sound financial management and to safeguard your chapter's resources:

- Designate one chapter officer to manage the chapter's assets (i.e. write checks, make deposits, record in check register, ledger, and/or computer) and another to review the fiscal records (i.e. receive each month's bank statement and reconcile it with chapter records). One of these two persons would normally be the chapter treasurer. This segregation of duties shares responsibility and helps prevent mistakes; it also ensures that funds are properly and ethically managed.
- Require checks over a designated amount be signed by two officers.
- Review the chapter's financial records periodically (perhaps each year at annual report time) by someone who is not a chapter member. The person need not be a CPA, although some financial knowledge is helpful. The purpose of the review is to prevent mistakes or inconsistencies and to get objective, outside feedback on how the chapter's financial resources and records are managed.
- Talk with other Chapter leaders and compare best practices on dues, membership cycles, and operational practices. You don't have to recreate the wheel!

Bank Account

Once you begin to take in money for operations through dues, donations, fees or other means, all money should go through the chapter bank account. In the United States, APTi's non-profit corporate status can be used to set up a chapter bank account by providing a copy of APTi's IRS letter confirming 501(c)(3) status, which is located in Attachment 1.

In the United States, a Federal Employer Identification Number is used for setting up your chapter bank accounts. APTi's Federal Employer Identification Number is 22-2291442. Some banks have special non-profit checking and money market accounts. Your chapter may qualify. Most chapters open checking accounts. However, if your chapter anticipates that it will need to access its funds very infrequently (for example if ongoing operating costs are covered by in-kind contributions and chapter funds are needed only for occasional special events), you may find that a chapter savings account is more economical.

Under no circumstances should chapter funds be co-mingled in a personal or private account. Contact the CDC Director-Chapter Operations and Finance for further advice.

Insurance

APTi carries general business liability insurance and professional liability insurance with coverages extending to chapter activities and programs. Coverages include business liability, property, damage, personal injury, libel, slander, wrongful act (decision-making) and publisher's liability. You must be an official APTi Chapter in good standing (having maintained the annually required criteria for APTi chapters and having submitted your annual chapter renewal) to be included in this coverage.

Tax Matters

APTi, a not-for-profit organization, is exempt from federal income taxes (excluding unrelated business income tax) under IRS code section 501(c)(3). Chapters in good standing who submit their annual reports are covered under this umbrella. Chapters located outside the USA (i.e. Canada) should consult their local government agency for advice on tax requirements for each country. Sales tax laws vary from state to state and each chapter should contact their local department of revenue regarding sales tax requirements.

For US Tax requirements, please visit <http://www.irs.gov/Charities-&-Non-Profits/Charitable-Organizations>. For Canadian requirements please visit <http://www.cra-arc.gc.ca/tx/nnprft/menu-eng.html>.

As part of a tax-exempt non-profit corporation, each APTi chapter is responsible for adhering to U.S. rules and regulation governing such corporations. For example, tax-exempt organizations:

- may not endorse political candidates;
- must limit other political activity, such as lobbying;
- generally may not engage in non-related business activity (i.e. generating income through a service or product that is not related to the exempt purpose of the corporation).

Define meeting schedule

Create a planned meeting schedule for the chapter. Include dates, meeting intervals and types of meeting, proposed attendees and draft agendas, to help you get started.

Application Approval Process

Submit Application

Send required materials (See Attachment 2: Application Form for Chapter Recognition) to the Chapter Development Council (CDC) for consideration and approval. After review, and any needed refinement, the CDC sends a recommendation, along with the application and supporting materials, to APTi. If the CDC does not approve the application, the CDC notifies the applicant of the reason(s) and what needs to be done for approval to be granted. After the needed steps are taken, the applicant submits the appropriate materials for CDC approval, as above.

APTi Member Verification

The APTi management company verifies that five current paid APTi members are included on your membership list. Once verified, APTi staff gives the application, supporting materials, and recommendation to the Executive Director and CDC chair, who present them at the next APTi Executive Committee meeting. If the minimum members cannot be verified, APTi staff will notify the applicant group's leadership so appropriate steps can be taken. Once five paid APTi members are verified, the process continues.

Executive Committee Review

The Executive Committee reviews the recommendation and approves or denies the application. If the application is approved, the process moves forward. If the application is denied, the Executive Director or CDC chair notifies the applicant group's president, of the Executive Committee's reason(s) and what needs to be done for approval to be granted. After the needed steps are taken, the applicant may submit the form directly to the Executive Director for Executive Committee review and approval.

Recognition

APTi staff completes the final recognition process by:

- a) informing the CDC chair so he/she can send a letter
- b) preparing and sending to the chapter president a APTi Chapter Agreement (Attachment 2)
- c) sending an accompanying welcome letter from the APTi president.

Chapter Annual Renewal Process

Each APTi chapter must submit an annual report of the year's activities in order to maintain a good standing position within the APTi organization. The deadline for the report is February 1 of each year. The report should be submitted directly to APTi's management company. The incoming chapter president and treasurer must both be current members of APTi at the Premium or Loyal level to gain APTi Chapter status and benefits, along with at least three other paid APTi members. Email addresses for chapter members will be added to APTi's Basic level of membership. See Attachment 3 for the Annual Chapter Reporting Checklist.

If your chapter's annual report is not submitted by first day of February, loss of chapter recognition and accompanying benefits may result. Good standing may be restored when the complete report is received and reviewed by the executive office. Failure to submit the annual report within 90 days will trigger chapter dissolution procedures.

Operating Your Chapter

The most important part of your chapter is the programming it provides its members. The programs you offer and the nature of your meetings will impact your ability to attract both attendees, and volunteers to help operate the chapter. These sections offer ideas on best practices in program development.

Program Planning

Form an annual schedule of program meetings. A range of formats/timing has been tried, including:

- brown bag lunches,
- wine and cheese evenings,
- half and whole day workshops,
- book discussions,
- monthly program meetings with presentations.

The time and format is completely at the discretion of chapter leaders, as is the frequency of meetings. Consider the following potential meeting locations:

- conference rooms at board members' places of work,
- classrooms at local educational institutions,
- restaurants with meeting rooms (there may be no charge if members order food)
- local church, hospital or business meeting rooms.

Some chapters decide to rent space, or meet in hotels, but most chapters try to minimize meeting room costs where possible. For a large geographic area or one with extended extreme weather, teleconferences and webinars can also be offered. Many areas have experimented with such programs, with great success.

Communications

Three major factors in the success of a chapter or type-talk group are communication, communication, communication. Letting people know your schedule of programs and meetings well in advance, and reminding them frequently is vitally important. Here are some suggested means of communication and marketing for these programs:

- Email and other social media, (i.e. LinkedIn, Twitter, and Facebook)
- Newsletters (usually via email distribution) and blogs
- Websites (local chapter and APTi), Meet-up and others
- Announcements in community newspapers
- Local radio and television stations
- Flyers left at locations frequented by possible "type types" (i.e. bookstores, career counseling offices, etc.)

Written communications provide a vital legal record of your Board meetings, and should be kept regularly. Use them to keep the CDC and APTi informed about your activities. Be sure to put APTi and the CDC on your email distribution list to ensure proper communication. APTi can also help publicize your chapter activities to potential new members on their website by emailing info@aptinternational.org three weeks prior to the event.

Programs and Presenters

Programs will naturally need to take into account the interests and needs of your chapter members. In addition to program content, you will probably want to vary the delivery format of meetings. Besides presentations, consider offering:

- panels,
- discussions,
- activities to improve application of concepts, etc.

Also, you will benefit from making sure you offer time for members to network and mingle informally.

Who can you get to present programs? Start with your own chapter members, local consultants and practitioners, and have them share their expertise. Consider regional and national guests as presenters for your chapter programs. Local members need not be type experts to present a program. For example, book reviews are popular and useful, and can be given by novice or intermediate type users. In fact, one important aspect of chapters is they offer a forum for new presenters to “try out” their ideas and approaches. Many of the ‘famous presenters’ in our community got their start in their local chapter!

Other contacts or sources for program ideas and names of potential presenters include:

- APTi interest area consultants (listed on the APTi Website).
- CDC members (listed on the APTi website)
- Check the speaker listing for APTi conferences. What members or training providers live nearby?
- Check the APTi training schedule. If a training program happens to be scheduled for your area, the trainer(s) are often willing to give a special program for our APTi Chapters.
- Other Chapter leaders in nearby cities and states.
- C. G. Jung Association, OD Network, training or coaching associations in your area are all good sources not just of presenters, but also of members.

Suggested Topics:

- Presentation techniques for teaching type concepts.
- Applications in various interest areas (e.g. counseling, education, finances, management and organizational development, relationships, spiritual matters)
- Book and journal article reviews.
- Group exercises related to type.
- In-depth understanding of the preferences.
- Common behaviors of each type.
- The dominant, auxiliary, tertiary and inferior functions.
- Ethical use of type.
- Problem-solving (i.e. where members share and consult with each other around troublesome type-related issues in their personal and/or professional lives).
- A talk by a member of the local Jungian society.
- “Type Nights” highlighting differences and similarities between people with various type preferences.
- Movie night, including assessing type elements of specific characters.
- Use of different type-related assessments and how they interact.

Steering Committee

Forming a steering committee helps you spread out the work of building membership, creating programs, recruiting speakers, and interacting with members. Starting with a small number of members (three to five) will likely facilitate the smooth running of your chapter. As your group grows, consider adding more positions or creating committees to help with the work. The committee's responsibilities should include:

- Planning and coordinating programs
- Convening and handling the logistics of meetings, i.e. setup, registration, teardown, etc.
- Building your membership (creating an email list or database)
- Managing and tracking financial and operating activity
- Communicating with APTi, and leveraging the support available
- Advertising
- Preparing newsletters, email blasts, social media blasts, etc.
- Developing a web presence (leverage the APTi website for this)

Changing a Chapter Name

The chapter must be in good standing before undertaking this process. The chapter desiring a change in name should:

- Seek chapter membership approval for the change to the new name
- Inform the CDC of the desired change
- Solicit feedback and endorsement of other chapters in the state and area which may be affected by the change in name
- Petition the APTi board in writing, through the APTi Executive Director, for approval of the name change at its next regularly scheduled meeting
- Work with APTi and nearby chapters to inform all APTi and chapter members in the state/affected area of the approval or disapproval of the chapter's new name
- Make sure that all appropriate changes have been made in APTi literature, APTi website, and chapter marketing materials and website

Continuing Education (CE) Credits Process

If your chapter offers workshops, seminars or conferences, you should consider obtaining permission to grant Continuing Education (CE) credits. Awarding CE credits is a meaningful way to serve your current membership and to attract new members. Contact APTi for information on the APTi CE credit process at info@aptinternational.org.

Financial Matters

Chapters must maintain proper records of all income and expenses. Bookkeeping programs, such as Quicken, simplify this process. Records should include, at a minimum, the required fields for reporting on the annual financial report (Attachment 5: APTi Chapter Financial Statement). This report must be submitted annually to APTi to ensure continued chapter recognition, tax reporting services and insurance coverage.

Your Board of Directors should review these practices, as well as annual dues, program attendance fees, and other financial reports, regularly.

Some revenue raising suggestions include:

- Chapter dues
- Admission fees for programs and meetings, with discounts designed to encourage attendees to join the chapter.
- Registration fees for special chapter events, such as local conferences, seminars and workshops.
- Cash donations (besides dues) or in-kind contributions (i.e. meeting space, postage, paper, copying, webinar and teleconference facilities) from members or their employers
- Seeking donations (tax-deductible, to the extent allowed by law) from members, guests and others who are committed to improving the effective and ethical use of personality type models.

Merging Chapters

At times, there may be a need to combine nearby chapters due to decreasing membership levels, finances and/or lack of leadership volunteers. If that is the case, here are steps to follow:

1. Closing chapter drafts a proposal to the desired chapter for a merger or some other new way of affiliating that meets the needs of both chapters. Take in to account the possibility if the closing chapter area grows & wants to become a chapter in the future
2. The proposal is approved by a majority of the closing chapter's members
3. There is negotiation between the closing and desired chapters and the results are approved by a majority of each chapter's members
4. The CDC is informed of the proposed arrangement with a recommendation to urge the APTi Board to accept it, including allowing the closing chapter funds to be transferred to the desired chapter treasury rather than to APTi.
5. The APTi Board votes to accept the CDC's recommendation.

Closing a Chapter

It is APTi's intent to support chapters in every way possible. Sometimes, though, a chapter's energy, interest, and activity level drop off and cannot be sustained. This may be due to any number of factors: economic changes in your area, difficulty in attracting members to meetings or programs, or loss of leadership and volunteers. Some indicators that a chapter is in decline and should consider closing include:

- No meetings held or programs offered in a twelve month period
- Has a treasury with no transactions in a twelve month period
- Cannot find qualified volunteer leadership, or has only a very small core group of volunteers doing all the work of the chapter
- Has not communicated officially (email, newsletter, flyers, etc.) with chapter members over a twelve month period

If any of the conditions below become true, you must contact CDC Chair and APTi's Executive Director at once, and initiate either corrective action or chapter closure:

- No longer has five paid APTi members in the chapter
- Cannot cover the APTi administrative fees for all APTi Chapter members
- Missed submitting an annual report or cannot find or access critical pieces of information as needed for the report.

Sometimes a declining chapter can rejuvenate itself, perhaps after the election of new leaders or due to some other catalyst. If your chapter has been inactive for more than one calendar year, then it will be required to "Re-Charter," following all guidelines for the establishment of a new chapter. Once the new chapter is chartered, then APTi may disburse the funds back to the new chapter to help it restart operations.

Sometimes the chapter simply becomes inactive and cannot recover in a timely manner:

- The former chapter will be declared dissolved,
- Funds will be transferred to APTi,
- Appropriate notification will be sent out to all APTi members in the affected area.

It is not in the best interest of APTi and its members for an inactive chapter to remain "on the books" for a long time. It appears unprofessional, and we also incur insurance and other expenses. Therefore, when a chapter appears to be inactive according to the indicators listed above, the following procedures will be initiated.

Chapter Status

The CDC contacts the most recent chapter president of record to gather more information on the chapter's status. If the chapter president cannot be reached, the CDC will try other chapter officers of record, if any, including past officers. If the leader(s) of the inactive chapter wish to try rejuvenating it, the CDC will offer APTi's resources of technical assistance, advice, information, and support to the greatest extent possible. The dissolution process will be suspended at this point so the chapter can work at reviving itself. This necessitates that all financial reporting is up to date.

If the chapter leader(s) decide, in consultation with the CDC, that the chapter is beyond revival, and/or do not wish to undertake the effort of reviving it, the chapter may choose to dissolve voluntarily; see Voluntary Dissolution.

If the chapter leader(s) do not wish to undertake the effort of reviving the chapter, but also refuse to

dissolve the chapter voluntarily, OR if no chapter leader can be reached for information on the chapter's status, the CDC will begin Involuntary Dissolution.

Voluntary Dissolution

The chapter president sends a written declaration to the CDC Chair that the chapter has been dissolved, with a copy to the APTi Executive Director. A final written accounting of the chapter's treasury shall be submitted at the same time. If the chapter has bylaws that specify a procedure for chapter dissolution, additional steps prescribed therein shall be followed and reported. Unless otherwise specified in chapter bylaws, any remaining chapter funds are to be transferred by check to APTi.

The Executive Director informs the Executive Committee of the chapter's declaration of dissolution and the disposal of its treasury. Upon Executive Committee ratification, the chapter is officially dissolved.

Involuntary Dissolution

The CDC chair submits to the Executive Director a written report on the status of the chapter, including indicators of chapter inactivity, why it cannot be revived, and a recommendation that it be dissolved by Executive Committee action. The Executive Director forwards the report to the Executive Committee, which votes at its next meeting to approve or deny the dissolution.

Dissolution Approval and Chapter Funds

If the dissolution is approved, the Executive Director communicates in writing to the most recent chapter president of record that the chapter is dissolved by action of the APTi Executive Committee with reasons. The letter requests that the funds remaining in the chapter treasury be transferred to APTi within thirty (30) days. A copy of the letter is sent to the CDC. When APTi receives the dissolved chapter's funds, the Executive Director notifies the CDC. If the chapter funds are not received within the specified time, the Executive Director follows up as appropriate after consultation with legal counsel and/or the Executive Committee.

Dissolution Disapproval

If the dissolution is not approved, the Executive Director communicates in writing to the CDC:

- a) the Executive Committee's reasons for not dissolving the chapter,
- b) directions or recommendations, if any, for additional action by the CDC with regard to the chapter.

Continued Chapter Activity

A chapter that is dissolved, whether voluntarily or involuntarily, may continue to function as a type-talk group if its members wish. However, it may no longer use the APTi name or logos, nor receive any other benefits of APTi Chapter status. Should restoration of chapter status be desired, a new application will be required.

Website Information

APTi is pleased to offer chapters exposure and recognition of their programs and other contact information. In order to make changes, additions or updates to the APTi website with regards to your chapter, please email all requests to info@aptinternational.org.

APTi Contact Information

Contact lists for APTi Board of Directors and CDC are available on the APTi website. The CDC Director-Communications maintains the contact list for current chapter leaders.

MBTI® Certification Programs

The MBTI® Certification Program delivers the foundational knowledge you need for effectively administering and interpreting the most respected personality assessment in the world, the Myers-Briggs Type Indicator® (MBTI®) instrument.

The MBTI® instrument is a restricted assessment, meaning it can only be purchased and used by those who meet certain requirements. Program participants who successfully complete an MBTI® Certification Program satisfy these requirements. MBTI Certified Practitioners use this powerful tool to help others in such areas as:

- Personal growth and development
- Career exploration and search
- Executive coaching
- Team building
- Leadership development

The MBTI® Certification Program is publicly offered by three training organizations in the United States:

- **American Management Association (AMA)**, 800-262-9699, www.amanet.org
- **Center for Applications of Psychological Type (CAPT)**, 800-777-2278, www.capt.org
- **CPP, Inc.**, 800-624-1765, www.cpp.com

There is also an MBTI® Certification Program specifically designed for career counselors and academic advisors:

- **G/S Consultants**, 530-541-8587, www.gsconsultants.net

The MBTI® Certification Program is publicly offered in Canada by:

- **Psychometrics Canada**, 800-661-5158, www.psychometrics.com.

Please review the certification schedules located on the websites and take advantage of having a MBTI® Master Practitioner in your area. MBTI® Master Practitioners may be available for evening chapter functions, which can be held in the training room at the hotel, free of charge. Contact the training organization to request making arrangements for the MBTI® Master Practitioner to speak to your group. You can also request to make a brief presentation by a chapter leader at the workshops held in your area. This is a great opportunity to recruit new members for your chapter.

Attachment 1: APTi IRS Tax Exempt Status Letter

 **IRS** Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248219411
Jan. 03, 2013 LTR 4168C E0
22-2291442 000000 00
00020665
BODC: TE

ASSOCIATION FOR PSYCHOLOGICAL TYPE
2415 WESTWOOD AVE STE B
RICHMOND VA 23230-4024



05821

Employer Identification Number: 22-2291442
Person to Contact: Laura Botkin
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Dec. 19, 2012, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in January 1981.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(2).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

Attachment 2: Application Form for Chapter Approval

Instructions: Please complete and send to the Chapter Development Chair (CDC) chair and include all required attachments.

Chapter Name: _____

*Current President: _____

*Current Treasurer: _____

***President and treasurer must be paid APTi members at the Premium or Loyal level for a chapter to receive official recognition.**

Mailing Address: _____

Is APTi on your chapter's email list? Yes No (If no, please add info@aptinternational.org)

Is the CDC on your chapter's email list? Yes No (if no, please add apti.chapter.ldrs@gmail.com)

Attachment Checklist (all documents must be included for application to be considered)

1. Roster of chapter members with names, email, phone, city, state and zip code. Please designate those who are paid APTi members (Must include at least five paid APTi members to be eligible for official chapter recognition).
2. List of chapter officers and other board or steering committee members, with terms of office and brief description of duties if not specified in chapter bylaws. Please designate those who are paid APTi members (President and Treasurer must be paid APTi members at the Premium or Loyal level).
3. Chapter bylaws are consistent with APTi bylaws.
4. Statement of goals and objectives consistent with APTi bylaws and mission. (May be part of chapter bylaws.)
5. Plan of regularly scheduled meetings (and other chapter activities, if any) for the next twelve months.
6. Budget: Include simple itemization of anticipated expenses and income. If chapter dues are assessed, include fees.
7. Sample newsletter or social media blasts, newsletters, or other materials published by the chapter to announce or describe meetings and programs. (If no mailings or emailings have been done, please describe how members are informed about chapter meetings/activities.)

Chapter President's Statement:

I have read the APTi Chapter Formation and Operations Guide and understand the rights and responsibilities of APTi chapters as described therein. I certify that the information provided in this application is true and correct to the best of my knowledge, and request that the above-named chapter be recognized as an official chapter of the Association for Psychological Type International.

Signature: _____ Date: _____

Attachment 3: APTi Chapter Renewal Cover Letter

Date: December 1, 2014
To: Chapter Presidents and Treasurers
From: Jane Winge, Chair, Chapter Development Council (CDC)
Tony Doucet, Executive Director
RE: Annual APTi Chapter Renewal Due February 1, 2015

We hope this note finds your chapter thriving, and preparing for an active, successful year in 2015. It is time to renew your APT International (APTi) Chapter Agreement for the coming year. **Your APTi Chapter Agreement, supporting documents and APTi administrative fees must be submitted by February 1, 2015.** This due date allows our management company the time needed to compile all of the chapter reports and submit our APTi tax forms on time. Please inform your Chapter Board members of these deadlines at once, so they can ensure your chapter meets them.

A MESSAGE TO YOU

We want to welcome all the new Chapter Leaders. We are hoping that you will be able to join us at our July 23rd Chapter Leader workshop and dinner at the APTi Conference in Miami and participate in our monthly Chapter Leader conference calls to share best practices to achieve our vision of partnership.

NOTE: If you've received this letter, but are no longer the leader of your chapter, it means APTi has the wrong contact information for your chapter's officers. Please reply at once and let us know with whom we should be corresponding.

ACTIONS REQUIRED

After reviewing the chapter renewal checklist, please submit:

1. Completed attached forms by February 1, 2015 or earlier to your chapter's DropBox folder. A separate invitation will be sent from APTi Executive Director, Tony Doucet.
2. Total amount of your APTi Administrative Dues, which is \$12/member for each of your chapter members, as of December 31, 2014. As you know, our structure has been changed so that ALL chapter members are members of APTi, at the minimum Basic membership level. This payment can be made in one of two ways:
 - a. Write a check payable to APTi, 2415 Westwood Avenue Suite B, Richmond, VA 23230 or
 - b. Call APTi headquarters at 804-523-5907 with your chapter's credit/debit card

The checklist of items you must include in your 2015 Chapter Renewal follows. If your 2015 Annual Chapter Renewal packet is not complete by February 1, 2015, your Chapter's affiliation with APTi could be ended. If your chapter is no longer active or does not wish to maintain its APTi affiliation, please contact:

- APTi CDC Chair, Jane Winge, at jwinge@aol.com, and
- APTi Executive Director, Tony Doucet, at info@aptinternational.org as soon as possible

We do not want to lose you, but if you must go, we'd like to make sure you are fully aware of the legal, operating, and tax implications for your chapter.

2015 Annual Chapter Renewal Checklists are also available online at
<http://www.aptiinternational.org/chapters/annual-chapter-renewal-process>

_____ **1) APTi Chapter Agreement (Required)** electronically signed and dated by President and Treasurer by typing your name and date in the designated boxes. These documents confirm the new chapter leaders' agreement to APTi expectations. Please **read the CPP, Inc., Trademark Guidelines revised August 2014**. As an APTi affiliated chapter, you should be aware of and in compliance with trademark use requirements from CPP, APTi partners, and other similar resources. This applies to both printed chapter material, and web-based use of marks. https://www.cpp.com/pdfs/Trademark_Guidelines.pdf

_____ **2) 2014-2015 APTi Chapter Board and Member Contacts (Required)** with current contact information (telephone # and email address), and an estimate of the monthly hours each person spends on Chapter business (required by IRS). We'll compile a summary for chapter leaders' reference. *NOTE: your President and Treasurer must both be current paid APTi members at the Premium or Loyal level and there must also be three other paid APTi members to qualify as an APTi Chapter.*

_____ **3) 2014 APTi Chapter Financial Statement Form (Required)**, all fields completed. Any outstanding liabilities as of the end of 2014 must be listed in the comment section of the document detailing the amount, the party involved and what the payment is for. This data is required for IRS tax filing.

_____ **4) 2014 APTi Chapter Programs (Required)** and 2015 programs planned (optional), including dates, program titles, meeting descriptions, speaker names/emails, CEUs approved and program comments. We'll provide a master list to chapter leaders for meeting ideas.

_____ **5) A copy of your Chapter Bylaws (If changed)** if there are changes. The bylaws are compiled to fulfill legal requirements for non-profits.

_____ **6) Copies of all bank and account statements (Required)** for each account owned by your Chapter. These statements are required for IRS tax filing. Electronic copies are preferred if possible, hard copies will also be accepted via fax or mail.

_____ **7) 2014 Board Meeting official minutes (Optional)**. Please submit electronic copies. Note: A letter or meeting minutes is required to set up a chapter checking account, which states that "The ___ Chapter of the Association of Psychological Type International" wants to establish an account with ___ (bank). This letter or meeting minutes has to be signed by the secretary of the chapter.

_____ **8) Chapter Information (Optional)**: Any additional information about your chapter you'd like to include, especially any best practices to share with other chapters.

WE'RE HERE TO HELP

If you have any questions or comments, please call the APTi executive office: 804-523-2907 on Monday-Friday between 9:00am-5:00pm EST or email info@aptiinternational.org. We value our relationship with your chapter and want to keep you as part of our international type community. Together we are better at fulfilling our mission! Thank you!

Attachment 4: 2015 APTi Chapter Agreement

On behalf of (chapter name), we accept the guidelines provided in the Association for Psychological Type International Chapter Formation and Operations Guide (CFOG) as being the standard for accepted operating practices for APTi chapters. Our chapter agrees to abide by the requirements summarized on page 4 of this document and will run our Chapter accordingly.

While APTi and the chapter are associated, each are individual and separate legal entities and are each responsible for their own debts and other legal liabilities with no obligations to each other.

APTi owns the associated logo and name "Association for Psychological Type International" and allows the chapter to use this name only in conjunction with the word "Chapter" in making it clear that the Chapter is not an official representative of the central office. If our chapter, at any time in the future, chooses to end its affiliation with APTi, we understand that use of the associated logo and name are among the privileges we will have to surrender.

We have also read the CPP, Inc., Trademark Guidelines and agree to abide by these standards.

President Signature

Printed Name

Date

By checking this box, I acknowledge the information is accurate to the best of my knowledge.

Treasurer Signature

Printed Name

Date

By checking this box, I acknowledge the information is accurate to the best of my knowledge.

Attachment 5: 2015 APTi Chapter Financial Information

For the specific form, please download (Excel format) from the APTi website, or request from the Executive Director.

Comments:

Chapter Name		
Chapter Location		
Treasurer Name		
Treasurer Phone Number		
Treasurer Email Address		
State I.D. No. (optional)		

2014 Income

Full/Professional chapter member dues collected		
Retired chapter member dues collected		
Student chapter member dues collected		
Scholarship/Lifetime/Honorary chapter member dues collected		
APTi affiliate dues collected in 2014 in addition to above		Represents money collected for affiliate members before the change in structure
Chapter conference & program fees collected		
Interest		
Other revenues - 2014		Should account for any other revenues in 2014, e.g. book sales, donations, etc.
Total Income	0	

2014 Expenses

Account/Bank Fees		
APTi Conference Registration fees		
Insurance		
Legal Services		
Web Services		
Postage and Mailing		
Printing and Photocopies		
Space & Equipment Rental		
Payroll Salaries		
Speaker & Instructor Fees		
Supplies		
Telephone		
Travel & Accommodations		
Other (please specify)		If your expenses don't fit these categories well you may want to add other lines to complete an accurate picture, e.g. Constant Contact
Total Expenses	0	

Total Net Profit	0	(Total Income minus Total Expenses)
-------------------------	---	-------------------------------------

2014 Opening Balances as of 1/1/2014

These balances must be provided for Opening

Checking Account		
Investment Accounts		
Accounts Receivable		
Other Accounts (specify)		
Total Opening Balance	0	

2014 Closing Balances as of 12/31/2014

These balances must be provided for Closing

Checking Account		
Investment Accounts		
Accounts Receivable		
Other Accounts (specify)		
Total Closing Balance	0	

Increase (decrease) in total balance	0	Closing Total Balance minus Opening Total Balance. This should equal Total Net Profit.
---	---	--

Outstanding Bills at year end 12/31/14

Other Liabilities (please specify in the comment section of the document detailing the amount, the party involved and what the payment is for)		
--	--	--