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## 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-affiliated 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. To help you, 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 regional chair and the APTi staff, you will find valuable resources on APTi’s website [www.aptiinternational.org](http://www.aptiinternational.org), including APTi’s mission, bylaws and ethical principles, committees and interest areas, and staff and volunteer leaders’ contact information.

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### Benefits of Achieving Chapter Status

Recognition as an official APTi-affiliated 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:

Run your chapter worry-free!

- As a 501 (c) (3) not-for-profit corporation, APTi is ***exempt from the requirement to pay federal income taxes***, as are regions and *formally affiliated* chapters. Region and 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.
- Receive ***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 formally affiliated chapter, you may also ***receive charitable contributions (other than dues) that are tax-deductible*** and ***provide receipts to donors*** acknowledging these gifts, to the extent provided by federal law. (NB: Dues are not considered charitable contributions.)

Offer and promote high-value programs for your membership

- Maintain and update ***chapter information, program schedule, and chapter links on the APTi Web site***
- ***Apply to offer Continuing Education (CE) credits through APTi*** for qualified chapter-sponsored workshops, seminars, and conferences
- Request that ***APA and NBCC Continuing Education (CE) credits be coordinated*** when offered at conferences
- ***Include Chapter Affiliate members*** in broadcast emails of general interest, as allowed by APTi Board policy. Beginning in January 2010, all non-APTi chapter members must become APTi Chapter Affiliate members for a fee of \$15/non-APTi member/year.
- Receive ***APTi member lists*** for your geographical area to use in promoting chapter activities, including email addresses, when these are available.
- ***Provide ethical practice guidelines*** for type practitioners (available on the APTi website)

Take advantage of optional administrative support for your chapter:

- For a nominal fee, chapters may request ***dues processing and/or maintenance of online Chapter membership list***, and other services



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- Having **APTi process large mailings at a bulk mailing rate to ordering mailing labels for APTi members** in your geographic region (fee based)
- **Request administrative assistance** for Chapter administration (fee based)

## Summary of Chapter Requirements

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

- Agree to conform to ethical standards for the use of type.
- Every year a chapter must complete and sign the *Affiliated APTi Chapter Agreement*, and submit all required reports from the prior year, including
  - ◆ Financial reports for the prior year
  - ◆ Copies of bank statements from the year, including statements from any investment accounts
  - ◆ Chapter Bylaws, policies and procedures, along with announcements of and minutes from your Board meetings.
  - ◆ Summary of your chapter's programming from the year.
  - ◆ Membership list and phone/email contact information.
  - ◆ At least five chapter members, including the President and Treasurer, must be professional/full APTi members.
  - ◆ Beginning January 1, 2010, all non-APTi chapter members must become APTi Chapter Affiliate members, at a fee of \$15 per person per year.
  - ◆ Your membership lists must specify which members are full APTi members, and which are Chapter Affiliate members, as of 12/31 of each reporting year.
- Inform APTi promptly of any changes to chapter leadership (new Presidents and/or Treasurers, in particular) by sending an email to [info@aptinternational.org](mailto: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 of MBTI® trademarks 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](http://www.cpp.com/pdfs/Trademark_Guidelines.pdf) Note: Pay especial attention to Guidelines 1-3.

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 Affiliated Chapters.



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### **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.

##### **Create Chapter Objectives**

Write a statement of goals and objectives consistent with regional and 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 regional and APTi Bylaws (available on the APTi member website). 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.



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### Define Membership Policies and Fees

Membership in an affiliated chapter is voluntary; however, as of January 1, 2010, all chapter members must belong to APTi. If at the time of their joining, they are not a fully paid member, they must become an APTi Chapter Affiliate member at the prevailing fee, as determined by the APTi Board of Directors. Membership in APTi does not include membership in a chapter; all chapters charge additional dues for their own use. 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, email addresses, and addresses of chapter members, indicating their APTi membership status.

NOTE: Each affiliated chapter must include *at least five (5) current APTi members (full/professional level)* among its membership. ***Without meeting this requirement, your chapter can not be eligible for official affiliation with APTi.*** If, at any time, your chapter's membership falls below five (5) 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 APTi members in your area (contact information is 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 related 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 fee for all non-APTi members who join your chapter. You can also encourage these members to become full APTi members online, via our website, [www.aptiinternational.org](http://www.aptiinternational.org).



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### ***Establishing Sound Financial Procedures***

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

- Appoint or elect a treasurer who is a current APTi member
- Open a bank account (Affiliated chapters can use the APTi Tax ID number for this) and authorize appropriate signators on your account.
- Develop a yearly budget including anticipated revenues (dues, fees, donations) and the associated expenses (i.e. phone calls, teleconference or 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 web 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 control the chapter's assets (i.e. write checks, make deposits, record in check register, ledger, and/or computer) and another to control 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 that checks over a designated amount be signed by two officers.
- Have the chapter's financial records reviewed 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!



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### ***Bank Account***

Once you begin to take in money for operation 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. You usually need to provide a copy of APTi's IRS letter confirming 501(c)(3) status.

In the United States, a Federal Employer Identification Number is used for setting up your chapter bank accounts. APTi will provide you with our I.D. Number. 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 your regional chair for further advice.

### ***Insurance***

APTi carries general business liability insurance and professional liability insurance with coverage's extending to chapter activities and programs. Coverage's include business liability, property, damage, personal injury, libel, slander, wrongful act (decision-making) and publisher's liability. You must be an officially Affiliated Chapter in good standing (having maintained the annually required criteria for chapter affiliation 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/nonprofits/index.html>.  
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 formally affiliated 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; and generally may not engage in non-related business



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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 1: Application Form for Chapter Recognition) to the RCDC (Regions and Chapters Development Committee) through your regional chair for consideration and approval according to regional operating procedures. After review, and any needed refinement, the regional chair sends a recommendation, along with the application and supporting materials, to APTi. If the region does not approve the application, the regional chair 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 regional approval, as above.

#### **APTi Member Verification**

The central office verifies that five current APTi members are included on your membership list. Once verified, APTi staff gives application, supporting materials, and recommendation to the executive director and director of Regions and Chapters, 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 APTi members in good standing 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 director of Regions and Chapters (RCDC) 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 regional chair so she/he can send a letter b) preparing and sending to the chapter president an Affiliate



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Chapter Agreement (Attachment 2) and c) sending an accompanying welcome letter from the APTi president.

### ***Chapter Annual Renewal Process***

Each formally affiliated 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 executive office. The incoming chapter president and treasurer must both be current members of APTi to gain Affiliated Chapter status and benefits, along with at least three other APTi members. See Attachment 3 for the Annual Chapter Reporting Checklist.

If your chapter's annual report is not submitted by last day of February, at the latest, loss of chapter recognition and accompanying benefits will 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 offers ideas on best practices in program development.

### ***Program Planning***

Form an annual schedule of program meetings. A range of formats/timing have been tried, including: brown bag lunches, wine and cheese evenings, half and whole day workshops, book discussions, and monthly program meetings with presentations. The time and format is completely at the discretion of chapter leaders, as is the frequency of meetings. Consider meeting in conference rooms at board members' places of work, classrooms at local educational institutions, 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
- On-line list serves
- Announcements in community newspapers
- Local radio and television stations



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- Flyers left at locations frequented by possible “type types” (i.e. bookstores, career counseling offices, etc.)
- Newsletters (usually via email distribution) and blogs
- Web sites (local, regional and APTi)
- Web social media (i.e., YouTube, LinkedIn)

Written communications provide a vital legal record of your Board meetings, and should be kept regularly. Use them to keep your regional chair and APTi informed about your activities. Be sure to put APTi on your mailing list to ensure proper communication. APTi can also help publicize your chapter activities to potential new members.

### ***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 sponsoring 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 in the Bulletin of Psychological Type).
- Regional chairs (listed in the Bulletin of Psychological Type).
- Check the on-line APTi membership directory. What members or training providers live nearby?
- Check the APTi training program catalog. If a training program happens to be scheduled for your area, the trainer(s) are often willing to give a special program for our Affiliated Chapters.
- Other Chapter leaders in your region.
- 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.



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- 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 meetings
- Building your membership (creating an email list or database)
- Managing and tracking financial and operating activity
- Communicating with the APTi, and leveraging the support available
- Advertising
- Preparing newsletters, email blasts,
- 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 regional chair 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 web site, and chapter marketing materials and web site



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### **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](mailto:info@aptinternational.org)).

### **Financial Matters**

Chapters must maintain proper records of all income and expenses. An Excel spreadsheet can be used for monthly tracking and should include, at a minimum, the required fields for reporting on the annual financial report (Attachment 4: APTi Chapter Financial Statement). This report must be submitted annually to APTi to ensure continued chapter recognition, tax reporting services and insurance coverage. Some chapters use software programs such as Quicken to simplify this process.

These practices, as well as annual dues, program attendance fees, and other financial reports, should be reviewed regularly by your Board of Directors.

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) 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.

### **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 can not be sustained. This may be due to any number of factors: economic changes in your area, difficulty 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
- Can not 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



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

- No longer has five APTi members in the chapter
- Can not cover the Chapter Affiliate member fees for all non-APTi members
- Has missed submitting an annual report or can not find or access critical pieces of information needed for the report.

Sometimes a declining chapter can rejuvenate itself, perhaps after the election of new leaders or due to some other catalyst. Sometimes the chapter simply becomes inactive and can not recover in a timely manner.

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. The former chapter will be declared dissolved, funds will be transferred to the international or regional treasury, and appropriate notification will be sent out to all APTi members in the affected area. Once the new chapter is chartered then the international or regional treasury may disburse the funds back to the new chapter to help them restart operations.

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 regional chair 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 regional president 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 regional chair 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 regional chair, 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 regional chair will begin Involuntary Dissolution.



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## *Chapter Formation and Operations Guide*

### ***Voluntary Dissolution***

The chapter president sends to the regional chair a written declaration 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 cashier's check to the international or regional treasury.

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 regional 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 either the international or regional treasury, as appropriate, within thirty (30) days. A copy of the letter is sent to the regional chair. When the dissolved chapter's funds are received by the region, the regional chair or treasurer notifies the executive director. If the chapter funds are not received within the specified time, the regional chair notifies the executive director, who 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 regional chair (a) the executive committee's reasons for not dissolving the chapter, and (b) directions or recommendations, if any, for additional action by the regional chair 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 Affiliated Chapter status. Should restoration of chapter status be desired, a new application will be required.



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## *Chapter Formation and Operations Guide*

### **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 [web@aptinternational.org](mailto:web@aptinternational.org).

### **APTi Contact Information**

Contact lists for APTi Board of Directors, Regional Chairs and Current Chapter leaders are available on the APTi website

### **APTi Training Programs**

APTi advanced application programs are offered throughout the year online, and sometimes in various cities across the United States. Please review the schedules which are distributed regularly and located on the web site, and take advantage of having an APTi trainer in your area.

APTi trainers are available for evening chapter functions, which can be held in the APTi training room at the hotel, free of charge. Contact the APTi Training Manager, to make arrangements for an APTi trainer to speak to your group. Chapter leaders are invited to make a presentation at the workshops held in their area. This is a great opportunity to recruit new members for your chapter.

The APTi training program welcomes input from chapters on topics of interest to their members. As a benefit, each chapter is given one complimentary registration (a \$250 value) to one Advanced Day workshop per calendar year. In addition, chapters are given one complimentary Advanced Day registration for every three chapter members that register to attend an Advanced Day workshop. In exchange for these complimentary registrations, APTi requests the opportunity to promote our workshops through chapter newsletters. Visit the APTi website for a complete list of programs, trainers, locations and hotels.



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## Chapter Formation and Operations Guide

### Attachment 1: Application Form for Chapter Approval

Instructions: Please complete and send to your regional chair and include all required attachments.

Chapter Name: \_\_\_\_\_

\*Current President: \_\_\_\_\_

\*Current Treasurer: \_\_\_\_\_

**\*President and treasurer must be APTi members in good standing for chapter to receive official recognition.**

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is APTi on your chapter's mailing list? Yes                      No (If no, please add)

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

1. Roster of chapter members with names, phone numbers, email addresses and mailing addresses. Please designate those who belong to APTi and those who are Chapter Affiliate Members. (Must include at least five 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.
3. Chapter bylaws that are consistent with regional operating procedures and APTi bylaws.
4. Statement of goals and objectives consistent with regional operating procedures and 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 other written 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: \_\_\_\_\_



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## *Chapter Formation and Operations Guide*

### **Attachment 2: APTi Affiliate 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 affiliated chapters of APTi. 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 debits 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

\_\_\_\_\_  
Treasurer Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date



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## Chapter Formation and Operations Guide

### Attachment 3: Annual Chapter Reporting Checklist

#### Annual Chapter Renewal Checklist:

- \_\_\_\_\_ 1. Signed *APTi Affiliate Chapter Agreement* as mentioned above
- \_\_\_\_\_ 2. **Attachment A:** Lists of your 2009 and 2010 chapter officers, board members and/or steering committees, including their current contact information (telephone # and email address). Please send a list for each of 2009 and 2010. *NOTE: your listed President and Treasurer must be current APTi members.* Please provide in **Excel format**. You must also include an estimate of the monthly hours each person spends on Chapter related business (required by the IRS).
- \_\_\_\_\_ 3. **Attachment B:** Annual APTi Chapter Financial Report. All fields must be completed. Any outstanding debits as of the end of 2009, need to be listed on a separate document detailing the amount, the party involved and what the payment is for.
- \_\_\_\_\_ 4. **Attachment C:** APTi Chapter Membership Structure Form
- \_\_\_\_\_ 5. **Attachment D:** Roster of current (paid in full) chapter members, as of December 31, 2009. Please indicate whether each is an APTi Professional member as of this date, or whether they will be covered by the new Chapter Affiliate member fee. Again, provide contact information (phone # and email address) for each member. *Note: As in the past, to qualify as an Affiliated chapter, your membership must include at least five professional APTi members.* Please provide this information in Excel format.
- \_\_\_\_\_ 6. **Attachment E:** List of all 2009 programs offered and meetings held, including program titles, meeting descriptions, speaker names, and dates.
- \_\_\_\_\_ 7. **Attachment F:** 2009 Board Meeting agendas and official minutes.
- \_\_\_\_\_ 8. **Attachment G:** Copies of Chapter Bylaws, or if full copies were provided last year, copies of any revisions approved during 2009.
- \_\_\_\_\_ 9. **Attachment H:** Copies of all bank statements and account statements for each account owned by your Chapter. These are also required by the IRS, since we include all Chapters' financial transactions in our tax filings as a 501(c)3 organization.
- \_\_\_\_\_ 9. **Attachment I (Optional):** Any additional information about your chapter you'd like to include, especially any best practices that can be shared with other chapters.



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## *Chapter Formation and Operations Guide*

### **Attachment 4: Annual APTi Chapter Financial Information Required**

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

Region  
Chapter Name  
Chapter Location  
Treasurer  
State I.D. No. (optional)  
Opening Balance

#### ***Past Year's Income***

Member dues received  
Conference & Program Fees received  
Interest  
Other (please specify)

#### **Total Income**

#### ***Past Year's Expenses***

Account/Bank Fees  
Conference Registration  
Insurance  
Legal Services  
Web Services  
Postage and Mailing  
Printing and Photocopies  
Office & Equipment Rental  
Payroll Salaries  
Speaker & Instructor Fees  
Supplies  
Telephone  
Travel & Accommodations  
Other (please specify)

#### **Total Expenses**

#### ***Past Year Closing Balances***

Checking Account  
Investment Accounts  
Accounts Receivable

#### **Total Balance**