

**Association for Psychological Type International  
Strategic Plan—2010 Update**

*Mission*

The Association for Psychological Type International (APTi) is the professional membership organization for people worldwide who use personality type and assessments such as the MBTI® tool.

We promote the practical application and responsible use of personality type through education and training, research, networking and community building.

Our purpose is to support personal and professional development through the constructive use of personality type differences.

<b>APTi's overarching goal is to attain financial self-sustainability.</b>	<b>Action Plan Responsibility</b>	<b>Goal Completion Date</b>
<b>1. Restructure APTi training programs for profitability</b>		
A. Adopt a maximum of 2 new on-line training platforms that can be reasonably supported. The use and success of this effort will help determine future efforts to expand the platform base.	Byron	January
B. Streamline the application process for: new trainers and new courses / repeat trainers with new courses / non-APTi members applying to be trainers / courses that are not seeking CE approval	Byron	March
C. Develop and test a training partnership with about 2 partners.	Ray, Jennifer Katherine	February
D. Develop and integrate the training program for 2010 in cross-promotion with the 2011 conference.	Byron, Dov, Judah, Karla	August
E. Offer 6 to 8 new courses aimed at professional development outside of Type (such as; Type and consulting as a business, The use of new technologies for Type practitioners...)	Byron	May
F. Execute a measurement and evaluation program for training in order to put a value on the program in terms of revenue and new membership. The end goal is to make a fact based determination on the role and capacity of APTi in the training realm.	Byron	ongoing
G. Develop and execute marketing plan for <ul style="list-style-type: none"> <li>• Training programs</li> <li>• 2011 Conference (develop conference marketing strategy)</li> </ul>	Karla, Byron, Dov, Judah, FASEB	ongoing, in line with training and conference activities
H. Ensure training is related to interest areas; these workshops, chapter meetings, regional conferences and a compelling Symposium program for the international conference in 2011	Jenny, Byron	ongoing

<b>2. Increase membership to a level that is financially sustainable</b>		
A. Create and execute strategies to retain membership. Facilitate two-way communication with membership. Write Bulletin articles.	Jerry	ongoing
B. Create and execute strategies to grow membership: 1. Aligned organizations (any professional organization whose members might be interested in APTi membership or programming; effort focused on local connection) 2. Member assistance 3. International opportunities	Jerry, Katherine (item 3)	ongoing
C. Maintain and communicate the membership value proposition	Jerry, John, Karla, Deb, Jennifer	ongoing
D. Implement new chapter affiliate program	Sharon	March
E. Working with Membership, plan a ‘membership upgrade’ campaign for Affiliate Members to Full/ Professional Members – this will be beneficial closer to year end/renewal time	Sharon	November
<b>3. Build strategic partnerships within the worldwide type community, concentrating on ways to improve value of APTi membership.</b>		
A. Recruit and assign relationship managers for current partners and provide ongoing support for partnership relationship managers. As new partners come on board, assign relationship managers.	Jennifer	March / ongoing
B. Identify and reach out to additional potential partners and the unique value proposition for each of them.	Jennifer	quarterly
C. Coordinate communications with external partners to ensure consistency and impact of message	Karla	ongoing

<b>4. Streamline how we provide services</b>		
A. Facilitate discussion of training/education needs with members, sister organizations and CP providers from outside North America and APTi SIGs and eChapter.	Byron, Katherine	July
B. Support board members in accomplishing their plans. Work with all board members to help them achieve their goals by focusing and aligning efforts, economizing use of resources, and maintaining focus on priorities.	Jennifer	ongoing
C. Improve board operating processes, including thorough and consultative strategic planning in Q4 of prior year, board meetings, other board communication, and decision-making.	Jennifer	ongoing
D. Work with President's task force to support the directors in effective project planning at commencement of the year and timely implementation and follow-through throughout the year.	Jennifer	March / ongoing
E. Evaluate feasibility of implementing an annual APTi membership renewal data (e.g., 7/1) starting in 2011, pre-conference. This will simplify the chapter renewal process, and enable us to better plan our budgets.	Sharon, Ray, John	December
F. Complete proposed re-design of RCDC into a committee that supports chapter leaders in chapter development, and regional APTi members with provision of regularly scheduled regional conferences.  1. Recruit new RCDC members  2. Complete transition to new RCDC responsibilities	Sharon, RCDC, Jerry, John, with input from Jenny (IACs), and potentially Byron (training)	April / mid May / July
G. Social media – develop strategy, link in with existing communities, contribute regularly to forums	Deb	March / ongoing
H. Website 1. Review current site – make appropriate/feasible improvements 2. Improve Interest Area pages on resources, contacts and training opportunities	Deb  Jenny	July / ongoing
I. SIGs: Develop a process for members to establish Special Interest Groups (SIGs) that allow for learning and networking easily, for temporary or long-term purposes	Jenny	April / June / September
J. Branding – ensure all communications by all Board members/FASEB are consistently branded and messaged	Karla	ongoing

<b>5. Build more contact with broader international type communities</b>		
A. Strengthen the global presence of APTi through planning joint conferences in non-conference years; seeking opportunities to provide training for new certified practitioners around the globe; create an APTi presence at BAPT, European Type Conference, AusAPT, NZAPT conferences; increasing the number of members from outside the U.S.	Katherine	ongoing
B. Work with conference co-chairs and pre-con chair to plan and execute a profitable and internationally relevant 2011 conference	Katherine	ongoing
C. Work with President-elect and Director of Chapters and Regions to explore mutually beneficial strategic partnerships within the worldwide type community for the purpose of growing awareness of the use of psychological type around the world and better ways of working together to help our membership grow.	Jennifer, Sharon, Katherine	ongoing
D. Complete a draft structure of International Affiliates that builds on current chapter structure, and consider enrolling one or two test cases, as they arise	Sharon	December
E. Bulletin <ul style="list-style-type: none"> <li>• Deliver quality Bulletin around agreed themes.</li> <li>• Improve profile of Bulletin</li> <li>• Disseminate accurate type information relating to the interest areas that deepens members' understanding of psychological type in specific areas</li> </ul>	Deb Karla  Jenny	ongoing
<b>6. Identify new opportunities for revenue and pursue those which are most promising</b>		
A. Fundraising – create an action plan for 2010 to develop fundraising relationships.	Ray	April 15
B. Silent auctions – determine silent auction feasibility.	Jennifer	Q3
C. Launch Cafe Press store, monitor items and sales	Sharon, Silvy, John	ongoing
D. Develop additional revenue sources for Bulletin, website, 1 <sup>st</sup> year of membership, training, and the conference.	Katherine	ongoing
E. Approach vendors, practitioners and training providers and other interested parties in the type community about revenue sharing ventures, co-marketing/branding, donations and sponsorship of APTi activities including but not limited to the conference, Bulletin, new members, student/senior members.	Katherine	ongoing

A comparison of the 2009 and 2010 plans:

- The majority of initiatives started in 2008 or 2009 have been completed or are on schedule to be completed in 2010
- Several new initiatives are underway in 2010. Strategy 5 is new this year while Strategy 4 has more emphasis and more tactical detail. Strategies 3 and 4 divide a 2009 strategy into two separate strategies which can more readily be executed. Strategy 2 is new this year, having essentially served as an overarching goal last year. This allows membership development to be more clearly delineated and executed in 2010. Strategy 1 is unchanged, although the tactics are different because it is appropriate to this year's goals for training. The overarching goal is new, having been a theme that was not previously articulated in the written version of the strategic plan.