

APTi Changes: Membership & Fees for Chapter Members

Greetings Chapter Leaders!

As you should already know from your Regional Chair, the RCDC Change Team has been preparing to support you as you communicate and implement the upcoming changes to APTi's relationship with chapters and their members. We want you to know that in addition to the written guidance that you will receive from us, both the Change Team and your Regional Chairs **are here to support you** with whatever questions or issues you may have. We would like to help you make this transition as seamless as possible. This guide provides a basic "how to" for implementing these changes in your local chapter.

Background

As most of you know, APTi has had a tough few years. There are several financial factors driving us to change our relationship with our Chapters, in order to maintain our organizational health and continue to fulfill our mission.

- First, APTi has not implemented a dues increase for its general membership for more than a decade.
- Next, the national organization has not ever required financial assistance from its chapters, yet administrative costs for maintaining regulatory compliance and chapter support has been steadily increasing.
- And last, we've had significant decrease in APTi revenue since we no longer offer MBTI® Certification programs

APTi's decline in revenue has caused the APTi Board to review and weigh the alternatives for the organization to be able to survive. After considering multiple strategies, the Board decided that creating a Chapter Affiliate Membership level would be the most logical, fair and cost effective method for covering a projected 50% of APTi chapter support expenses.

The Chapter Affiliate Program

In the past, a minimum of five people from each chapter, including Chapter Presidents and Treasurers, were required to be full members of the national organization in order for chapters to be considered official APTi chapters. This will continue to be true going forward.

Starting in 2010 there will be a new requirement added: to remain an official chapter, all chapter members will be required to belong to APTi. They can fulfill this by joining as a full member, or they can, through the chapter, join at the new *Chapter Affiliate* level. **This new requirement must be met for a chapter to remain an APTi affiliated chapter.**

The easiest way to make this transition in your chapter is to list all your non-APTi members on a log, and to submit \$15/person to cover their Chapter Affiliate membership fee, which will be \$15/person in 2010. This \$15 will help fund the 'invisible' benefits that APTi provides to chapters, described below.

New Dues Levels: Professional, Student, Retiree

All of your chapter members are encouraged to consider becoming **full** APTi members; we hope that you will please emphasize this, as we want to encourage full membership for all your members. The value provided by full membership is far greater than its cost for any who use type professionally.

All membership fees will be slightly increased for 2010:

- Professional member \$110
- Retiree \$75
- Student (full time degree) \$52
- Chapter Affiliate member (new) \$15

Chapter Leader To-Do's

Here is the list of things you should do to maintain your APTi Affiliated Chapter status:

1. Get a list of your Chapter members, as of 12/31/2009
2. Determine which of your members belong to APTi, as of 12/31/2009. How, you ask?
 - a. You can look up members by geographic area on the APTi website www.aptiinternational.org
 - b. We will email you an excel file along with your renewal packet, which will list all APTi members current as of that date, and their location
 - c. If you need more help, you can email us at info@aptiinternational.org
3. Decide as a Chapter Board whether you are going to continue to be an APTi Affiliated chapter. (We really hope you will!) If you do, please complete your Renewal packet and send everything in by the deadline of 2/1/10. If you do not, please READ CAREFULLY the section at the end of this document.
4. Decide how your chapter wants to pay the \$15 per non-APTi member fee. You can
 - a. Notify your non-APTi chapter members of the new requirement for a minimum of Chapter Affiliate membership (either through email, at meetings, etc...)
 - b. Encourage them to consider joining APTi at the full level. If they join before the end of 2009, they can join at this year's lower rate. Effective 1/31/10 all membership rates will increase.
5. Collect the \$15 fee for all non-APTi members who belong to your chapter, and create a log of all these members. This will be the record that you enrolled them as APTi Chapter Affiliates.
6. Keep a copy of this log for your own records
7. Send a copy of this log, along with a check for the total amount due (\$15 x the number of new Chapter Affiliate members) to APTi, with your annual Chapter Affiliation Renewal packet, due by February 1, 2010. This will be *in addition to* all the other requirements: chapter membership, leadership, program, and financial information

Collecting and Submitting the Dues

The easiest way for you to collect the \$15 fee from current non-members would be to add a line item for an additional \$15 to your Chapter's membership form, indicating that all current APTi members are exempt from that extra payment. Collect this from your members when they renew their chapter membership. If your renewal date is at another time of the year, you may opt to pay this fee now out of your treasury and collect the money at the time of renewal.

We have heard that some chapters will increase their dues and collect the fee from the individual members, while some will simply pay the dues, on behalf of their Affiliate Members, out of their existing chapter treasury. All of these strategies are acceptable. For your members who are renewing their APTi professional membership, these dues can be paid online via the APTi website or can be collected by the chapter, to be forwarded to APTi. **Be sure to keep careful and precise records accounting for all money sent into to APTi; keep one copy for your chapter's records.**

Sending Paperwork to APTi

In early December, all chapter presidents (or the equivalent) will receive their 2010 Chapter Affiliation Renewal packets from APTi. **The completed packets are due to APTi by February 1, 2010.** All attachments for the packet must be received **no later than February 28, 2010**, or we will assume your chapter is opting out of APTi affiliation.

What if Your Chapter Opt's Out of APTi Affiliation?

We really hope that your chapter does not make this choice. However, if you do, you need to be aware of the many items that your Board will need to attend to. This list is not exhaustive, and you will need to check with your own State or Province to find out what other matters you may need to cover. Some of the benefits you will lose will include:

- Tax-exempt status: you will no longer be covered by APTi's Tax ID number
 - You will need to close any bank accounts and investment accounts based on that number, and open new ones, using your own identification numbers.
 - You may need to collect and pay sales taxes, depending on the laws in your area
 - You will not be able to accept donations and provide proof of tax-deductibility to your donors
 - You may need to file anew, and get your own 501(c)3 status, or similar tax-exemption, if you choose to do so
- Insurance: your chapter will no longer be covered by APTi's liability policy
 - You will need to underwrite your own risk by getting your own insurance policy, or opting to self-insure
 - You will have to void any agreements or contracts you have with meeting locations where you have cited the liability policy number provided by APTi
- Financial and tax reporting
 - APTi will no longer be filing tax returns on your Chapter's behalf
 - You will need to file your own returns, based on a separate Taxpayer ID number
 - You may need to get your own audit of your financial statements
 - You may need to provide new documentation to your bank or other institutions
- Organizational identity
 - Your chapter will no longer be able to have "APT" in its name, or to represent itself in any way as associated with APTi, the Association for Psychological Type, APT, etc.
 - Logos and other symbols that belong to APT will have to be removed from your website, checks, stationery, and other publications or materials.
 - Listings of all your chapter events will be removed from the APTi website where we list sponsored events. APTi may at another time decide to create listings of community

events that might be of interest to our members, and your chapter would be able to list events there.

- When soliciting future speakers or presenters, you will not be able to state or imply that you are associated with APTi.

Please DON'T go... we really want you to stay. If your Board has concerns, please call one of us, and let us help you assess the true costs of leaving.

The Change Team and Regional Chairs are here to Help!

We hope this guide helps you understand both the necessary changes and the steps you need to take to implement the new requirements smoothly and efficiently. Again, the Change Team and your Regional Chairs are here to support you, and to answer whatever questions or issues you may have. You will find their contact information below:

RCDC Director

Sharon Richmond
650-856-8687
sharonrichmond1@gmail.com

Canada Chair

Donna Dunning
donna@dunning.ca

Great Lakes Regional Chair

Jerry Black
630-232-4228
jerry@clientfocusinc.com

Great Plains Regional Chair

Gary Fleishacker, Ph.D
763-525-1005
garyfleishacker@aol.com

Northeast Regional Chair

Cindy Stengel Paris
215-680-2138
cindy@thepeopleskillsgroup.com

Southeast Regional Chair

Gary Williams
205-410-3582
garywill@hiwaay.net

Southwest Regional Chair

Cash Keahey
(972) 231-6621
cash@peopleforte.com

Western Regional Chair

Pam Rechel
503 287-4323
pamrechel@msn.com

APTi Change Team

Gary Williams
garywill@hiwaay.net
205-410-3582

Mary Charles Blakebrough
mcbreakthrough@gmail.com
919-493-5424
919-656-9573 (cell)

Jean Porto
threads17@gmail.com
703-475-1041

Sabrina Goff
tru2type@yahoo.com
(541)953-9833

Denny Baran
dwbaran@hotmail.com

Jill Chivers
jill@imlisteningnow.com

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APTi International Contact info:

Main Office

John Lord, Executive Director
(phone) 301-634-7451, (toll free) 800-847-9943, (fax) 301-634-7455
(email) info@aptinternational.org