

APTi Changes: FAQ's

What is the purpose of the \$15 Chapter Affiliate Membership?

It is a fee assessed to chapters, based on how many non-APTi members they have in their ranks. The money will help pay for the (mostly invisible) administrative overhead that APTi incurs to support chapters. There are many such expenses, such as maintaining 501(c)3 non-profit status, providing liability insurance which covers chapter meetings, and filing annual income tax reports with the IRS, as well as other behind-the-scenes support.

Why is this being added right now, when times have been so tough for us all?

APTi has not increased its dues for more than a decade, and has also not required chapters to pay dues, even while the associated administrative costs have been steadily increasing. In past years our revenues from Qualifying Training and other programs helped cover these costs. However, APTi has had a significant decrease in revenue due to changes in our ability to deliver MBTI® Qualification / Certification programs. It is now both financially impossible and fiscally irresponsible to continue doing business as usual. After reviewing multiple solutions, the APTi Board decided that creating a Chapter Affiliate Membership would be the fairest, most logical and most cost effective way to cover the expenses described above. We estimate that this new level will fund only 50% of the total cost to APTi of supporting chapters.

What other sources of new revenue is the Board considering?

The 2010 full member dues will increase slightly for the first time in over a decade. Professional dues will be \$110, Retiree dues will be \$75, and Student dues will be \$52. The Board is investigating a number of new revenue-generating ideas, such as creating an online store for logo items. Watch for announcements of these and other new services coming shortly.

How do Chapters benefit from being affiliated with APTi?

APTi provides many services that reduce the cost of every chapter's membership. These services include:

- Liability insurance necessary for on-ground events
- Maintenance of 501(c)3 status, allowing chapters to open bank accounts and operate as 'non-profit' organizations
- Filing of federal tax returns that include chapter operations
- Permitted right to use the APT corporate name and identity
- Processing of Continuing Education (CE) credits for Chapter program events (MBTI®, NBCC, APA)
- Organization of the APTi conferences with special events for chapters
- Promoting Chapter events and Chapter membership on the APTi web page and in the *Bulletin of Psychological Type*
- Support for Regions and Chapters at the APTi Board level and organization of regular conference calls with region and chapter leaders.

When will these changes be effective?

You will be receiving your 2010 Affiliate Chapter Renewal packet in early December. The Chapter Affiliate Agreement renewal will be due to APTi on February 1, 2010, and all the associated documents must be received by February 28, 2010. The new membership fees are effective as of 1/1/10.

How will this change what Chapters report to APTi?

The major change is that chapters will need to send, along with the usual Membership List showing which members also belong to APTi, a payment that covers the \$15 for each of your members who are NOT current APTi members. The rest of the renewal packet will be pretty much the same as last year.

Do individuals pay APTi directly or do the Chapters collect and write a check to APTi?

The chapters will collect the dues and send one payment to APTi. It is up to your chapter whether you ask each member to pay the additional \$15, or you decide to cover the cost for your non-APTi members.

Can the chapter choose to pay for the Chapter Affiliate memberships?

Chapters have already suggested many strategies that they will use to cover these costs:

- Some will increase their membership dues
- Some will encourage members to join through program pricing
- Some will have the affected members pay the \$15 fee
- Some will simply cover the cost for their members, at least for the first year.

What are the consequences of non-compliance with the new membership rules?

After February 28, 2010, if the renewal packet isn't received, your chapter will be assumed to have opted out of affiliation with APTi.

Will there need to be a standardized time of year to renew?

At the moment, no. Chapters currently have many different membership renewal practices. Some have found it useful to have a once a year renewal date for all members. Some still use a "rolling" membership date. APTi has had a rolling renewal date, mainly because members often joined after their qualifying program ended. In 2010, APTi will be considering going to a once-a-year renewal date. If we do so, it would make a lot of sense to coordinate this with Chapters.

Can APTi create a membership report generated by zip code to the appropriate chapter?

Yes. Membership reports (including name, email address, etc.) can be generated for APTi members only, by zip code or zip code radius searches. This service is already offered to Chapters. If you'd like to request such a list, please contact the APTi office.

Will APTi have a "member ID number" that can be tracked easily when Chapter Affiliate Members join?

APTi will be collecting only the Chapter Affiliate membership fees and rosters from the chapters at this time. Our current staffing levels and database structure don't allow for us to enter each

person into the APTi database at this time. We are exploring whether we can add a self-renewal option on our website for the 2011 renewal season.

Are Chapter Presidents and Treasurers required to be an APTi member at the regular level?

Yes, this requirement remains the same. In addition, chapters must still have a minimum of 5 full APTi members in their ranks, including the President and Treasurer.

Do the chapters themselves owe a membership fee to APTi?

No. The Chapter Affiliate membership level was selected as an alternative to charging chapters individually. This allows maximum flexibility for each chapter, and acknowledges the differences inherent in larger versus smaller chapters.

Is there a requirement for proof of Student/Retiree status?

Yes – students will be asked to provide a copy of a current full-time student ID. Retired professionals are asked to identify themselves. Our intention is to offer a special rate for people moving into or out of the regular work force. If someone is still working and earning income, we don't consider them retired.

What exactly are the benefits of membership at each level?

Professional members (including Retiree and Student) receive, as part of their membership:

- A substantial discount on SkillsOne®, the online assessment delivery platform for the Myers-Briggs® instrument. In 2009, the benefit was that with purchase of \$195 or more of CPP products, APTi members will receive either a complementary one-year Skillsone.com subscription (for new subscribers) or a one-year renewal (for existing subscribers). Both are valued at \$195. CPP reserves the right to change this member benefit, which we are currently renegotiating for 2010. *Please note: going forward, CPP will be offering SkillsOne benefits only through APTi, and won't be negotiating separate agreements with individual chapters, or with type talk groups unaffiliated with APTi*
- Articles on the latest type applications (*Bulletin of Psychological Type*); and the latest research (*Journal of Psychological Type*)
- Unlimited access to the entire 30-year archive of *Bulletin of Psychological Type* magazine, an incredible resource for type practitioners and enthusiasts alike
- Advertising through APTi's Referral Network, which allows potential clients to search for type consulting services by location and by type of service offered
- Easy networking with other type professionals worldwide through our online Membership Directory
- Access to Interest Area and Special Interest Group (SIG) activities, such as phone calls or lists of resources, which help members connect around common interests

- Access to APTi's e-Chapter, for a small additional fee of US\$25, which offers regular online teleconference programs, open ONLY to full APTi members.
- Substantial discounts on educational programs, trainings & conferences, including a changing array of advanced workshops and e-Learning programs focused on practical application of type knowledge.
- Discounted Credit Card processing and eCommerce services, available through Practice Pay Solutions (PPS). PPS discounts their \$49 set-up fee to \$25 for APTi members *in the U.S. and Canada*. Go to: www.practicepaysolutions.com/apt

What are the benefits of the Chapter Affiliate membership?

Chapter Affiliate members enjoy the full fellowship and learning with others interested in type provided by an APTi affiliated Chapter through regular meetings and programs. These members will also receive occasional email announcements and updates from APTi.

What prevents us from all becoming members at the lowest level?

Nothing. And if we lose too many members, APTi is at real risk. But we fully believe that APTi members who value our organization and its mission, and who know the value delivered from the list of benefits above, will retain their full membership. Perhaps they will even convince a few others to upgrade to full membership.

Will there still be Regional Chairs?

Perhaps. APTi currently has six regions, some of which have only two or three active chapters. The RCDC (Regions and Chapters Development Committee – comprised of one Board member, every Regional Chair, and APTi's Executive Director) has been reviewing the kind of support that chapter leaders value. APTi is considering replacing the Regional structure in 2011 with a functional structure more aligned with chapter needs, as we understand them:

- Program design and speaker recruitment
- Volunteer leadership and succession planning
- Managing chapter finances and operations
- Conference planning and coordination

What is the mission, role, and function of APTi, and what does our paid staff do?

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.

The APTi staff, contracted to an organization called FASEB, provides administrative support for the above mission and goals.

What will happen to local Chapters if people don't want to join APTi but still want to belong to their chapter?

We believe most people will accept that the Chapter Affiliate Membership is necessary for the chapter to remain a low-cost option to explore and share type with others. If they do not, then each Chapter's Board has the choice to withdraw from APTi affiliation, but we REALLY hope they do not!

Will Chapter Affiliate members have access to the APTi membership database?

No.

Does APTi affiliation help us get better speakers or a reduced speaker rate, or cheaper materials?

Yes. Many of the excellent speakers who come to our chapters do so because of their passion for APTi. Often professionals will present to our groups because we can attract a fairly large and type-savvy crowd; this is valuable enough that such speakers often present for APTi affiliated chapters either at no cost, or at very reduced rates. Regional Chairs and other chapter leaders have long been a great resource for finding such speakers.

How many chapters does APTi expect to lose as a result of the new requirements?

We hope to lose none, although, realistically, we can imagine a few very small, inactive chapters may choose to opt out of further affiliation. However, the mostly positive feedback we have received from most chapters encourages us to expect that most chapters will remain affiliated with APTi.

To what extent is the availability of, or participation in, a local APTi chapter a factor in the decision to join APTi?

Historically only about 20% of APTi members have also belonged to a local chapter. We think this percentage is influenced by how many chapters we have, and where they are located. New chapters will continue to be launched as they always have been, by small groups of volunteers who want a local component to their ongoing type education. We anticipate that as APTi grows financially stronger, we will be able to support more promotion of local activities, which should result in more local chapter members over time. Obviously we can't promise this.

I still have questions. Whom should I contact?

Your Regional Chair is always available to you by email or phone, and that contact information is on our APTi website: www.aptinternational.org , under Regions and Chapters. Click on the link for the Region to find contact information for the Region's leadership. In addition, you are welcome to contact any APTi Board members, whose contact information can be found on the website under About Us. Or call John Lord, our Executive Director, at our administrative offices. **We are all here to help you through this transition!**