



Association of Professional  
**GENEALOGISTS**

# **CHAPTER HANDBOOK**

January 2008

## **Purpose**

This handbook is intended to serve as a tool for effective chapter management for chapters of the APG. Its aim is to provide information to both chapter members and leaders.

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## **Part I ABOUT APG**

APG is a professional association for all genealogists supporting high standards in the field of genealogy. It has grown from a membership of 19 when founded in 1979 to nearly 2000 members worldwide in 2007. APG is an independent organization whose principal purpose is to support professional genealogists in all phases of their work: from the amateur genealogist wishing to turn knowledge and skill into a vocation, to the experienced professional seeking to exchange ideas with colleagues and to upgrade the profession as a whole. The association also seeks to protect the interest of those engaging in the services of the professional. Membership is open to any person or institution willing to support the objectives of APG and the APG Code of Ethics.

### **APG seeks to:**

- promote international awareness of, and interest in, professional genealogical services,
- promote professional standards in genealogical research, writing and speaking,
- engage in activities which improve access, facilitate research and preserve records used in the fields of genealogy and local history,
- promote awareness of activities and/or laws which may affect genealogical and historical research,
- educate the membership and public through publications and lectures, and
- provide support for those engaged in genealogical pursuits as a business.

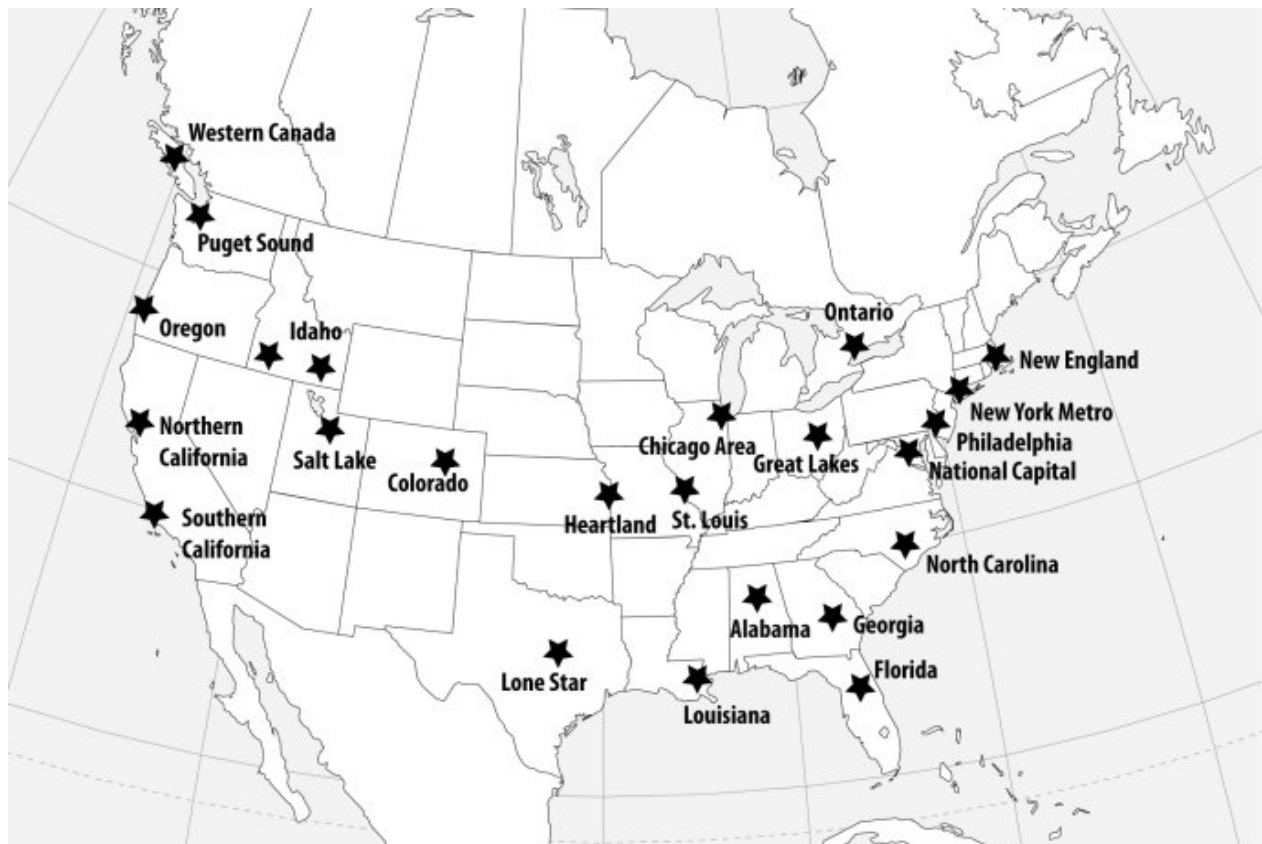
### **The APG Code of Ethics**

1. Promote a coherent, truthful approach to genealogy, family history and local history.
2. Present research results and opinions in a clear, well-organized manner; fully and accurately cite references; and refrain from withholding, suppressing, or knowingly misquoting or misinterpreting sources or data.
3. Promote the trust and security of genealogical consumers.
4. Advertise services and credentials honestly, avoiding the use of misleading or exaggerated representations; explain without concealment or misrepresentation all fees, charges, and payment structures; abide by agreements regarding project scope, number of hours, and deadlines and reporting schedules; keep adequate, accessible records of financial and project-specific contacts with the consumer; and refrain from knowingly violating or encouraging others to violate laws and regulations concerning copyright, right to privacy, business finances, or other pertinent subjects.

5. Support initiatives that preserve public records and access to them.
6. Be courteous to research facility personnel and treat records with care and respect; support efforts to locate, collect, and preserve the records by compiling, cataloging, reproducing, and indexing documents; refrain from mutilating, rearranging, or removing from their proper custodians printed, original, microfilmed, or electronic records.
7. Promote the welfare of the genealogical community.
8. Give proper credit to those who supply information and provide assistance; refrain from (or avoid) knowingly soliciting established clients of another researcher; encourage applicable education, accreditation, and certification; and refrain from public behavior, oral remarks or written communications that defame the profession, individual genealogists, or the Association of Professional Genealogists.

## APG Chapters

Chapters are organized to promote the activities of the Association. They are made up of APG members who live in the same geographic area. It is not unusual for that area to cover a large region. Chapter affiliation is encouraged although not required. APG members may belong to more than one chapter. Members are encouraged to check the APG website to locate a chapter in their area and contact the chapter representative.



## **Part II CHAPTER ORGANIZATION & MANAGEMENT**

### **Leadership**

Chapters are self governing and operate according to their chapter bylaws. The individual chapters define their own goals. Chapter leadership should reflect this. The only chapter position that is mandated by the APG is that of Chapter Representative whose appointment is for one year, with the same person filling this position for a maximum of six consecutive years.

[APG Procedures Manual, Section IV:I:G]

The following duties and responsibilities could be considered during the formation of a chapter or as a chapter changes in scope and size.

#### **Chapter Representative:**

- Serves as the chapter's contact to the APG Administration via the Chapter Liaison and Executive Director
- Holds copies of APG bylaws, policies and applicable procedures and is familiar with sections relating to chapters  
[APG Procedures Manual, Section IV:I:H]
- Sends reports at least twice yearly to the Chapter Liaison  
[APG Procedures Manual, Section IV:I:F]

#### **President:**

- Guides the chapter to meet their stated goals.
- Leads meetings
- Sets meeting time and location
- Follows through on assigned tasks/duties, both for self and others
- May or may not be the designated Chapter Representative

#### **Vice President:**

- Fills in for president when president is unable to perform his/her assigned duties
- Undertakes other duties as assigned

#### **Secretary:**

- Maintains the records of the chapter

- Maintains the communication among chapter members, i.e. minutes; announcement of upcoming meetings etc

#### Treasurer:

- Maintains the financial records of the chapter

#### Program Chair:

- Works with other members to meet the educational needs of the chapter

*Hint: The smaller Chapter might opt to have one individual be responsible for several duties while a chapter with a larger membership will have one duty per individual.*

## **APG Parent Organization**

### Role of the APG Chapter Review Committee

The APG Chapter Review Committee is comprised of at least three members, one of whom must be a member of the Board. Appointments to the committee, including the naming of the chairperson, are made by the Executive Committee, subject to the approval of the Board. The Committee offers assistance and advice to APG members seeking to establish new chapters. They review all applications, and ensure proposed chapter bylaws are in compliance with APG bylaws, policies and procedures. The Committee monitors/investigates chapters who fail to adhere to the bylaws, policies and procedure of APG.

[APG Procedures Manual, Section IV:IB, IC]

### Role of Chapter Liaison

The APG Chapter Liaison is chairman of the Chapter Review Committee. The Chapter Liaison along with the Executive Director serves as the chapters' contact with the parent organization. The Chapter Liaison works with chapters on ways to operate within policy and procedure and to resolve any operations problems with compliance. He/she also maintains a current list of chapter representatives and contacts each one regularly, requesting activity reports. Summaries of activities are to be sent to the *APG Quarterly* editor.

[APG Procedures Manual, Section IV:I]

### Role of Chapter Activity Committee

The Chapter Activity Committee is an ad hoc group that explores ways in which the parent organization can support chapters, assists in communication between chapters and the parent organization during a specific defined project, coordinates or carries out specific tasks from the parent organization in support of chapter activities, and works with organization leadership to coordinate and present the annual Gathering of the Chapters.

## **Finances**

[Note: This section will be updated when we get a ruling from the IRS on FEIN (tax ID) numbers.]

There is no “one right way” when it comes to dues or chapter expenditures. The chapter membership will need to make the decision. Each chapter is free to determine how to cover its expenses. Before making this decision, chapters should consider what they will need.

If the chapter opts to charge dues then a complete accounting should be maintained, including the amount, date paid and member’s name. A bank account should be opened in the name of the chapter and a designated person should be responsible for the deposits and withdrawals to this account.

A set financial reporting routine should be established and followed.

An audit procedure should be set up and included in the by laws of the chapter.

APG will consider grant requests from chapters for funds to assist the chapter in projects or activities for which their normal dues/budget does not provide. Guidelines and application form is found in Part V CHAPTER MANAGEMENT TOOLS.

## **Meetings**

The frequency of chapter meetings is at the discretion of the individual chapters but a minimum of two annually meetings must be held.

The goals of meetings should be established by the individual chapters. Beyond the need to handle chapter business issues there are several types of programs that can be held. For suggestions see Part IV FORMING A NEW CHAPTER.

*Hint: Programs topics should meet the widest range of chapter members needs and not focus on the needs of one individual.*

## **Membership**

Only members of the APG may become members of a Chapter. Members may belong to more than one chapter. Names of new members are found in the APGQ. Chapter representatives with questions about membership status, operations, etc. should direct their questions to the Executive Director and the Chapter Liaison at the same time. The best time to request membership updates from the Executive Director is the first week of March, June, September and December.

[APG Procedures Manual, Section IV:III]



## Responsibilities of the APG and the Chapters

The responsibilities of the individual, chapter and parent organization run full circle, what is good for the chapter and the individual is also good for the parent organization.

### Individual to the Chapter

- Attend and participate in the chapter meetings and events
- Represent APG in a professional and ethical in manner

### Chapter to Individual

- Educate the public about the benefits of hiring a professional genealogist
- Produce chapter brochure
- Maintain continued presence at local events
- Offer mentoring
- Present education and networking opportunities
- Provide an arena to learn the workings of APG and its benefits
- Provide a training ground for the individual, through chapter involvement, for eventual opportunities to work with the parent organization on committees, as a board member or as a member of the executive committee

### Chapter to Parent Organization

- Provide information to the *APG Quarterly* via the Chapter Liaison of chapter activities
- Write articles for the *APG Quarterly*
- Submit any literature, press releases, website or other such communication intended for the general public to the Executive Director who will forward to the Publications Advisory Committee. Items need to be submitted at least two weeks in advance for approval'  
[APG Procedures Manual, Section IV:II:C]  
[APG Policy Manual, Section IV:IV]
- Keep on file with the Executive Director a current list of distributed materials (member lists, brochures, flyers, newsletters, etc.).
- Encourage members to volunteer at the APG booth when attending national conferences
- Encourage members to volunteer to work on committees and to submit suggestions and nominations when requested

## Parent to Chapter/Individual

- Supply professional brochures that can be used by chapters to use in a booth they may be sponsoring locally. Those brochures can be purchased by members to be used to promote their businesses.
- Educate the public about the benefits of hiring a professional genealogist
- Maintain timely individual chapter presence on APG website
- Maintain up to date Internet presence and membership search engine
- Offer mail Lists, forums, blogs, chat room and any new electronic communications media (keep current in electronic communications)
- Maintain good communications between parent and members
- Market APG to other professional organizations
- Provide funds (via grant application) to the chapter to help in offsetting the cost of projects and activities beyond their budgetary scope
- Maintain high standards of ethical behavior among the APG members
- Continue to offer professional service as funds and feasibility allows

## Communication within Chapter

Communications is a vital issue as chapter members often only see each other at meetings. The chapter is encouraged to develop the best method for communicating with their members using all options available to them. The chapter will need to reevaluate their communications method as technology and their membership changes.

The maintenance of a current member email list is important to keep all chapter members informed of meetings and to pass on business information including meeting minutes.

In some cases and for convenience, chapters have asked members without an email address to provide SASE to forward any communications that were sent via email to the other members.

A chapter forum online that only chapter member can access allows a private means for communications among chapter members. Members are able to share ideas on the management of chapter meetings, educational topics and other chapter issues.

The chapter should not discuss business issues on the APG-Mail List. This is currently a public mail list and not restricted to APG members. The private APG Members Forum allows such discussion.

## Websites

Chapters are listed on the Chapter page of the APG website with links to information on the chapter or to their website. There are currently a few options for chapter websites. Some chapters have someone create the HTML pages in whatever program they choose and send the APG webmaster those HTML pages to upload into the APG server space. In other instances the APG webmaster maintains the individual chapter page within the overall APG site. If there are edits to be made the chapter sends the specific edits to webmaster. If the changes are extensive a Word document with the text should be sent for cut/paste purposes. Other chapters maintain their own website on their own webserver either through Rootsweb or other services. For those the APG webmaster inserts a link from the main APG Chapter page to that website. A website template will eventually be created and placed in Part V Chapter Management Tools.

## Use of APG Logo

The APG (association) logo as a stand-alone emblem is to be used only on materials for projects directly and specifically sponsored by the parent organization. It may not be used by an individual member or chapter for any purpose.

Chapters may develop a chapter logo as stipulated in the APG Procedures Manual. This logo must be approved by the Executive Committee before its use. A chapter logo cannot be used as a stand-alone emblem. It must be displayed along with the APG logo on all printed and electronic materials as stipulated in the APG Procedures Manual. Chapters must complete a logo license agreement before publishing any materials and displaying the APG logo and their chapter logo. If chapters chose not to use a chapter logo they are to use the APG logo with words identifying their chapter as specified in the APG Procedures Manual.

An APG Member logo is available for use by all members in their printed and electronic business materials. It and specific directions on its use are available for download in the Members Only section of the APG website.

[APG Procedures Manual Section IV:II]

[APG Policy Manual Section IV:V]

## Deactivation

Chapters may be deactivated for one or more of the following reasons:

1. At the request of the chapter members.  
The chapter must send a written notice to the Chapter Liaison and the Executive Director stating date this is to take effect.
2. Membership has fallen below the required level of five.  
The Executive Director will advise the Chapter that it has six months in which to recruit additional members, otherwise the chapter must fold.
3. The chapter has failed to adhere to the bylaws, policies and procedures of the parent organization.  
When a chapter has violated the bylaws, policies or procedures of APG and

continues to do so despite two warnings from the Chapter Liaison and efforts by the Chapter Review Committee to resolve the difficulty, then a recommendation for deactivation will be sent by the Chapter Liaison to the Executive Director for Executive Committee review. If the Executive Committee accepts this recommendation, it will seek the approval of the Board and set the date for the chapter to cease to function.  
[APG Procedures Manual Section IV:IV]

## **Part III STRATEGIES FOR A SUCCESSFUL CHAPTER**

### **Ten Tips for a Successful Chapter**

1. Make each member feel special.
2. Delegate! People are both capable and willing.
3. Get new members involved. Give them jobs that use their skills and help them to get to know other members.
4. Pick up a few new volunteers at each event.
5. Create an environment that stimulates discussion. Give members an opportunity to network and exchange ideas.
6. Make your meetings and events interesting to everyone.
7. Remember name tags when appropriate.
8. Have some form of communication—a newsletter or Internet forum--and communicate frequently. Always list names and be sure to list all new members.
9. Thank members for their contributions to the Chapter.
10. Provide personal contact. Call any member who hasn't been to a chapter meeting recently.

### **Membership recruitment ideas**

- Have a vendor table at regional genealogical events. Use these events to promote APG, the local chapter, and educate the public about professional genealogy. Make use of the brochures and banner available through national. Contact the Executive Director for more information.
- Plan membership meetings around large regional genealogical and historical events.
- Personally contact new APG members in your area and invite them to your meetings via snail mail, email and/or phone. New members are published in the APG Quarterly.
- If there are longtime APG members who haven't joined the Chapter, call them and invite them to come to the meetings. If they still don't come, ask them to be a speaker at your chapter meetings.

- Communicate the mission of your chapter. Show prospective members how they will benefit from membership.
- Have someone in your chapter be in charge of membership. This person should have a thorough understanding of the mission of the chapter and be able to convey the benefits of joining.
- Promote your meetings. Put flyers up at local libraries and Family History Centers. Invite “serious” genealogists. Post meeting notices on county rootsweb site and/or genealogical society websites.
- Refer to your local chapter in your biography when speaking at genealogy events or for articles you have written or on your brochure.
- Participate in an “Ask a Professional” event with a local genealogical society, Family History Fair or Ancestors Road Show.
- Recruit family historians from local historical societies and at history events.
- Have a membership application on your Chapter website.
- Have a chapter website. List your members and your program meetings.
- Sponsor an annual family history essay contest. Find out who is interested in family history in your area and promote your chapter. Arrange to have the winning entry published at a local genealogical or historical society.
- If you don’t have a chapter in your area, branch out. Look under the umbrella for librarians, historians, writers, etc.
- APG members can belong to more than one chapter. If an APG member frequently travels to another chapter area, he or she may be interested in belonging to that chapter also. Have a sign-in sheet at meetings for members and guests. Contact the guests. Give them membership information.
- Have a joint meeting with another genealogy or history group in your area. You may find people who are interested in your chapter.
- Develop a chapter brochure. Distribute it to local repositories and libraries.
- Consistently present high quality, educational meetings and promote your meetings.
- Emphasize that an advantage of chapter membership is that often members refer clients to other members.
- Word of mouth is important in recruiting members. Tell people about your chapter.
- List the Chapter website in the online Yellow Pages or the print version under Genealogy

## Membership retention ideas

- Assign a mentor to new members if they are interested—help someone start a website, practice a lecture or critique an article.
- If your chapter covers a large geographic area or if you don't meet often, find a means of communication and discussion—newsletter, blog, online chat forum, etc.
- Be a support system for each other. Attend each others lectures and read each others articles.
- Arrange an occasional virtual meeting to reach those who have difficulty making meetings.
- Occasionally schedule meetings on a different day, time and place than your usual meeting time so people with different schedules have a chance to attend meetings.
- Find ways that new (and old) members can contribute to the chapter. Do not overwhelm them. Give them small, one-time-only tasks unless they ask for more.
- Make sure that part of each membership meeting is devoted to self-introduction and chitchat.
- Have a longtime member spend a few minutes collecting biographical information about a new member and then introduce the new member to the group.
- Take a survey. Find out what programs members would like to have and their other needs. Accommodate them.
- Have a Chapter email list. Use it to keep in touch with members in between meetings about genealogy activities in the area.
- Have a summer or winter social meeting—no speaker or business meeting. Have a social, annual holiday potluck lunches, bring your spouse, etc.
- It takes many people to run an organization Break down big jobs into small manageable tasks. Get inactive members to do these tasks. Inactive members are more likely to renew their membership if they feel needed.
- Have occasional advanced study/discussion groups.

# Program Ideas

## Business Skills

- Getting a Handle on Business: Some Considerations
- Insurance for the self-employed
- Accounting for a Small Business like Genealogy
- Billing and Invoicing
- Financial Planning for Genealogists
- Cataloging Books with Bibliographic Software
- How to Have a Successful Genealogical Research Trip
- Promoting Yourself and Your Genealogy Business
- Your Genealogy Business Website—how to build and maintain a website
- How to build your APG profile (individual page)
- Building a website for a client
- Update on Electronics for research, writing, storing data, synching, to handle information, graphics, reports, files, databases to present to clients, family, lectures, articles
- Time Management
- Power Uses of the Internet
- Electronic Headaches and Cures
- Client/Customer Relations
- Client Contracts
- Genealogy Software, hardware, databases, data backups
- Starting a Genealogy Blog
- Indexing Projects
- Choosing a Retirement Plan
- How to Write a Book Review
- Spreadsheets



- Goal Setting
- Speaking Tips

## Professional Development

- Continuing Education Opportunities
- Heritage Photos: Scanning, Restoring, Preserving and Publishing
- From Historian to Genealogist to Author—How Records Can Lead the Way
- The Role of the Private Investigator—Genealogical Related Searches
- Heir Searching
- 20<sup>th</sup> Century Research
- The Process of Certification—the new rules
- Certification and Accreditation
- Writing the Client Report
- Writing the Negative Report
- Identifying and Dating Photos
- Favorite Genealogical Tips
- Publishing—local level or national, print-on-demand
- Developing your writing skills
- Presentation skills and equipment
- Organizing the Client File
- Writing Family Histories
- Advances Topics (on any subject)
- Legal Issues
- Copyright Law
- Preservation
- Family Reunion Planning
- Review APG Code of Ethics

- Analytical and organizational skills
- Citation writing workshop
- DNA Update
- Effective Lobbying/Public Record Access/new legislation
- Hiring subcontractors (other APG members)
- Identifying and Writing about Family Artifacts
- Social History

## Records

- Researching House Histories
- Using Law Libraries
- DAR Simplified
- Ethnic research (African-American, Native American, Irish German, Jewish, etc.)
- Location research (city, county, region, state, country—NYC, Erie County, Olympic Peninsula, Pennsylvania, Canada)
- NARA records (Native American, Chinese Exclusion Act Records, Census, Ship Passenger Lists, various war pensions, immigration, military, land, cartographic, African American, and non-population census records etc.)
- Specific records available at local genealogical libraries, archives, history collections
- Group discussions with local records commissioners
- NUCMC, LexisNexis database
- Little Known Resources
- Resources that are particular to your local area

## Miscellaneous

- Brainstorming
- An annual socializing meeting, lunch or dinner
- Joint meeting with a local genealogical or historical society

- Ideas for educating the community about genealogy

## Tours

- Local genealogical or historical collections at libraries, local repositories, archives, history collections, county clerk's offices, college libraries

## Speakers

- Members of your Chapter – find out more about their specialties
- Local librarians, historians and archivists
- Lawyers, CPAs, Insurance Agent (a specialist in a desired area of interest), Funeral Directors

# Part IV FORMING A NEW CHAPTER

## General Information

APG has chapters in the United States, Canada and around the world. Many members of APG live in localities where chapters exist, but are unaware of them. If a chapter does not exist in your area, consider forming one that will meet the needs of those in your geographical region.

If you are interested in forming a chapter and know at least five other APG members in your area who are also interested, please read the *Guidelines for APG Chapter Bylaws* found below and complete and return the *APG Form for Chapter Application* found in Part V CHAPTER MANAGEMENT TOOLS. It is the role of the APG Chapter Review Committee to offer assistance and advice to APG members trying to start a new chapter. For more information about creating a chapter in your area, contact [admin@apgen.org](mailto:admin@apgen.org).

## Guidelines for APG Chapter Bylaws

### ARTICLE I. OBJECTIVES

1. To promote international awareness of, and interest in, professional genealogical services
2. To promote professional standards in genealogical research, writing, and speaking
3. To engage in activities which improve access, facilitate research, and preserve records used in the fields of genealogy and local history
4. To promote awareness of activities and/or laws which may affect genealogical and historical research
5. To educate the membership and public through publications and lectures; and
6. To provide support for those engaged in genealogical pursuits as a business.

### ARTICLE II. MEMBERSHIP

1. Members of Chapters of the Association of Professional Genealogists shall be members of the Association of Professional Genealogists.

### ARTICLE III. OFFICERS

1. Each chapter is required to vote for a chapter representative to the Association of Professional Genealogists and may elect other officers as desired.

2. If a chapter decides to collect its own dues, then a treasurer must be elected by the chapter members.
3. Each chapter will determine the length of term for its officers.
4. Chapters shall be governed by their own bylaws and by those of APG, and will adhere to any changes or revisions adopted after the Chapter was accepted. The Chapter will also at all times be bound by the Policy and Procedures as set forth in the APG Policy Manual and APG Procedure Manual, including changes or revisions adopted after the Chapter was accepted.

#### ARTICLE IV. MEETINGS AND MEMBERS

1. The frequency of chapter meetings shall be at the discretion of the individual chapters but must be a minimum of two annually.
2. Chapter meetings may be opened to the public who may attend as guests.
3. Only chapter members can vote in chapter elections and ballot measures.
4. Only chapter members can serve as chapter officers.
5. Only chapter members can be listed in materials published by the chapter.
6. Non-members:
  - a) Can attend chapter meetings.
  - b) Can participate in chapters activities except those designated in Article IV:3, IV:4 and IV:5.

#### ARTICLE V. OPERATING PROCEDURES

1. The Chapter Representative of the chapter shall be responsible for sending reports at least twice yearly to the Chapter Liaison of the Association of Professional Genealogists who will act as a contact between the chapter, the Chapter Representative and the Executive Committee of Association of Professional Genealogists. The Chapter Liaison will prepare reports for the APG Quarterly editor.
2. Chapters shall communicate their activities, concerns, questions through the Chapter Liaison who will channel such communications to the appropriate APG entities as prescribed by the Procedure Manual and the Policy Manual.
3. APG through its Chapter Liaison shall keep chapters informed of changes in policy and procedures that affect them.
4. Except as otherwise required by the bylaws, chapters are self governing. The Association of Professional Genealogists cannot be held legally responsible for the actions of the chapters beyond the bylaws.

5. Each chapter will conduct itself in a manner that is in keeping with the professionalism of the APG. All literature, banners, posters, letters etc. will be professional in appearance so as to maintain the APG's image as a professional organization.
6. Any literature, press releases or other such communication intended for the general public shall be submitted to the Publications Advisory Committee at least forty five days in advance of use.

## ARTICLE VI. FINANCES

1. If dues are collected, then the dues of each chapter shall be deposited in a bank account. The bank account shall be in the name of the chapter.

## ARTICLE VII. AMENDMENTS

1. No amendments can be made in these bylaws without the approval of the Executive Committee of the Association of Professional Genealogists.
2. Amendments or revisions of these bylaws may be proposed by the representative of the chapter, with a vote of the chapter members. A written proposal shall be sent by the Chapter Representative to the Chapter Liaison, who will review the proposal and transmit it to the Executive Committee. The Executive Committee will vote upon any such proposal at their Executive Committee meeting and will report back to the Chapter Liaison within ninety days of receipt of the proposal. The Chapter Liaison will communicate the Executive Committee's decision to the Chapter Representative.

## ARTICLE VIII. DEACTIVATION

1. Chapters may be deactivated by the parent organization (APG) according to criteria prescribed by the Procedure Manual.
2. Chapters may request deactivation according to procedures outlined in the Procedure Manual.

## **Part V CHAPTER MANAGEMENT TOOLS**

### **Templates:**

- Stationary -- coming soon
- Chapter brochures -- coming soon
- Bookmarks/rack card -- coming soon
- Website -- coming soon
- APG Grant application
- Reimbursement forms
- Sample Membership letter local area national member
- Sample Membership email local area national member
- Application to form new chapter

The following forms are for reference only.

Please see the Member's Only section of the APG Web site for electronic versions of these templates and forms.

## **APG GRANT APPLICATION**

APG will consider grant requests from APG chapters for funds to assist the chapter in projects or activities for which their normal dues/ budget does not provide. Requests are to be made by chapter officers and will be considered on a rotating basis. Allow a minimum of 3 months lead time. Attach a copy of your chapter budget or financial statement to this application. If the grant is approved a final report summarizing the project and expenditures is due no later than 2 months after completion of the project or activity.

Date of Application:

Chapter Name:

Contact Person and address:

Email:

Project Description:

Budget Summary:

Send completed application to:  
Kathleen Hinckley, CG  
Executive Director APG  
P.O. Box 350998  
Westminster, CO 80035-0998  
fax 303-456-8825  
email: [admin@apgen.org](mailto:admin@apgen.org)



**APG Reimbursement Claim Form**

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Address: \_\_\_\_\_ Fax: \_\_\_\_\_  
 \_\_\_\_\_ Email: \_\_\_\_\_  
 \_\_\_\_\_

Expense Category \_\_\_\_\_

The claimed expenses pertain to which one of the following? Fill out separate forms for each category.

- |                          |                    |                          |   |
|--------------------------|--------------------|--------------------------|---|
| <input type="checkbox"/> | Booth              | <input type="checkbox"/> | APG Luncheons (NGS & FGS)                         |
| <input type="checkbox"/> | Web Site           | <input type="checkbox"/> | Professional Management Conference                |
| <input type="checkbox"/> | APG Quarterly      | <input type="checkbox"/> | Brochures, Pins & other Sales Items               |
| <input type="checkbox"/> | APG Directory      | <input type="checkbox"/> | Events (i.e. Roundtable) or Lecturers             |
| <input type="checkbox"/> | Advertising        | <input type="checkbox"/> | Policy & Procedures Manual or Bylaws              |
| <input type="checkbox"/> | Election Committee | <input type="checkbox"/> | Reimbursed Conference Expenses                    |
| <input type="checkbox"/> | Other: _____       | <input type="checkbox"/> | General Admin. (incl. other Committees' expenses) |

Specific Charges:

(Office Use)

Date	Type of Expense	Purpose of Expense	Amount	Allowed Amt.
Total				

Signature of Claimant: \_\_\_\_\_

Below this line for APG office use or your committee chair.

Remarks & Signature of Authorized APG Member:

**Sign and send to APG Treasurer, P.O. Box 350998, Westminster, CO 80035-0998**

## Sample Membership Letter to Local Area National Member

Dear [FIRST NAME],

I have recently received your name as an APG member who lives in the area covered by APG's [name of chapter]. As Chapter Representative, I would like to invite you to attend our next meeting and consider joining our chapter. Our next meeting will be on [ day and date] at [time]. Chapter members usually arrive between [x:00] and [x:00] to chat with each other. We start our meeting with updates on local repositories and/or other announcements, followed by either a presentation or a discussion. The program for this upcoming meeting is [give description] and will be held at [give location and directions]. We meet [#] times a year at various locations depending on the program. Some of our previous programs have included [describe some recent programs].

Please RSVP to me by [day and date] at [give email address] to let me know if you'll be able to come to the meeting. If you can't be there, please let me know if I can answer any questions and if you are interested in joining our chapter. If you'd like to learn more about the chapter you can read about it at [give chapter's website address]. Hope to see you on [give date of next meeting]

[your name]

Chapter Representative, [name of chapter]

Association of Professional Genealogists

[Your email address]

<http://www.apgen.org>

[chapter's web address]

## Sample Membership Email to Local Area National Member

Dear [FIRST NAME],

I have recently received your name as an APG member who lives in the area covered by APG's [name of chapter]. As Chapter Representative, I would like to invite you to attend our next meeting and consider joining our chapter. Our next meeting will be on [day and date] at [time]. Chapter members usually arrive between [x:00] and [x:00] to chat with each other. We start our meeting with updates on local repositories and/or other announcements, followed by either a presentation or a discussion. The program for this upcoming meeting is [give description] and will be held at [give location and directions]. We meet [#] times a year at various locations depending on the program. Some of our previous programs have included [describe some recent programs].

Please RSVP to me by [day and date] at [give email address] to let me know if you'll be able to come to the meeting. If you can't be there, please let me know if I can answer any questions and if you are interested in joining our chapter. If you'd like to learn more about the chapter you can read about it at [give chapter's website address]. Hope to see you on [give date of next meeting]

[your name]

Chapter Representative, [name of chapter]

Association of Professional Genealogists

[Your email address]

<http://www.apgen.org>

[chapter's web address]

# APG Form for Chapter Application

The members of this petitioning chapter

- Have read and will abide by the Association of Professional Genealogists Guidelines for Chapter Bylaws, and the Association's Bylaws and Code.
- Understand that each Chapter must also stay in conformance with the APG Procedures and Policies as set forth in the Procedure Manual and the Policy Manual
- Understand that each Chapter must have bylaws. The suggested bylaws in this section will form as the basis, to be modified as necessary. All modifications need to be approved by the Executive Committee.
- Would like to be known as the \_\_\_\_\_ Chapter.
- Agree to promote the objectives and programs of the Association of Professional Genealogists.
- Are aware that to form a chapter they must have a minimum of five persons who are current members of the Association of Professional Genealogists. Those persons are: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are aware that if they become a chapter of the Association of Professional Genealogists, all chapter members must also be members of the Association of Professional Genealogists.
- Agree to designate a Chapter Representative to the Association of Professional Genealogists and to report Chapter activities at least twice yearly to the APG Chapter Liaison, who will act as a link between the chapter, the Executive Committee, and the APG Quarterly.
- Have enclosed a copy of their chapter bylaws that are not in conflict with APG bylaws and agree that proposed amendments to the bylaws will be sent to the Chapter Liaison to be transmitted to the Executive Committee. The Executive Committee will vote upon any proposed amendments and report back to the Chapter Liaison.
- Signed by:  
(Name, Title & Date)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Send application to: APG Chapter Liaison, [admin@apgen.org](mailto:admin@apgen.org)  
or P.O. Box 350998, Westminster, CO 80035-0998