

PLEASE READ THIS CAREFULLY WITH REGARD TO ELIGIBLE REIMBURSEMENTS AT EACH INDIVIDUAL EVENT. THERE HAVE BEEN IMPORTANT CHANGES MADE.

FISCAL POLICY EFFECTIVE JAN 1 – DEC 31, 2025

The Secretary/Treasurer shall furnish a surety bond for an amount not less than the current balance of all accounts, with the exception of the CD's. The premium of said bond is to be paid by the Chapter and the bond to be held with the records of the Sec/Treasurer during his/her term of office.

The President or designee will be reimbursed for mileage with mapping/mileage documentation and meal expenses to attend regional chapter meetings.

The Secretary/Treasurer shall receive \$350.00 per month as compensation for services rendered.

The Editor shall receive \$300.00 compensation for every publication in support of the Chapter.

The Chapter Member Representatives and the President will have mileage reimbursement with mapping/mileage documentation to attend meetings representing a MA UPMA member where e-Travel is not authorized.

The Sec/Treasurer will pay \$10.00 annually for each retired/associate member to the MA Retired Secretary/Treasurer in January. The MA Chapter will reimburse the retirees for E-Board members that attend retired luncheon meetings.

REGIONAL CHAPTERS: In an effort to promote membership, attendance and member involvement, each regional treasury (5 exist as of the adoption of this policy: 010-013, 014-017, 018-019, 020-024, 025-027) will be eligible for a stipend of \$1500 from the MA Chapter in January with the submission of a specific voucher provided by the Sec/Treasurer, the previous year's regional area annual treasurer report, copies of all meeting minutes and copies of all Baystater articles submitted for each issue.

REIMBURSEMENT ELIGIBILITY FOR ALL EVENTS: To be eligible for reimbursement for attending any listed UPMA event, a specific voucher for each event will be provided by the Sec/Treasurer and must be used. The voucher and all required documentation must be submitted to the Sec/Treasurer within 30 days of the event. Members requesting any reimbursement must assist and fully participate in conducting UPMA business while at the event(s). This is defined as being in attendance at all President mandated events from beginning to end. MA UPMA members who receive compensation for attending the event(s) from another UPMA source are not entitled to MA Chapter reimbursement.

LEGISLATIVE SUMMIT:

- The MA Chapter may host a dinner for all MA UPMA members at the Legislative Summit event.

- Eligible legislative expenses for members other than elected Executive Board members will be reimbursed from the legislative funds. Any eligible reimbursements in excess of the available legislative funds will be distributed from the MA Chapter checking account in 2025.

Legislative Summit Eligible Reimbursement for:

President
 Exec Vice-President
 Sec/Treasurer
 Editor
 Retiree President
 Legislative/PAC Chair
 Regional Vice Presidents (5)

- Early registration as indicated on the event registration form.
- Airfare transportation if required, up to 10% over the Sec/Treasurer due to departing point. All flight documentation must include an itemized itinerary showing the departing/arriving airports, times of flights and amount paid, excluding any travel points used.
- One luggage fee each way if applicable.
- For members that drive, mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer with all receipts and mapping/mileage documentation.
- Hotel room at the convention rate as indicated on the event registration form.
- Up to \$75 with receipts for departing airport parking or for combined transportation to and from the departing airport to include parking at Logan express, bus tickets, rideshares, etc. There will be no mileage reimbursement to and from the home base airport.
- UPMA or hotel provided transportation to hotels must be used if provided. Any required charges for UPMA provided transportation will also be reimbursed with receipts. If no UPMA or hotel transportation provided, rideshares, buses, taxis, etc will be reimbursed up to a maximum of \$100 for this event. Members are expected to carpool to the extent possible.
- Rideshares will be reimbursed for transportation to and from Capitol Hill with a receipt and listed passengers on the voucher. Members are expected to carpool to the extent possible.

All other MA UPMA members meeting eligibility for Legislative Summit reimbursement:

- All expenses outlined above with the exception of the hotel room.
- Hotel room at one half (½) the convention rate as indicated on the event registration form.

STATE CONVENTION:

- There will be one 50/50 drawing at the state convention designated for PAC.
- All other net proceeds from fundraising activities will be designated for the scholarship fund.
- Up to five (5) \$1,000 scholarships will be awarded at the state convention.
- \$2,000 will be allotted for door prize drawings at the state convention for registered MA members only.

- There will be no transportation costs associated with the state convention.
- Full registration AFTER the early registration date will be \$99, with no reimbursement.
- Full non-member registration will be set at \$150 or partial registration will be set by meal selections as indicated on the registration form.

State Convention Eligible Reimbursement for:

President
 Exec Vice-President
 Sec/Treasurer
 Editor
 Retiree President
 Regional Vice Presidents (5)

- There will be no registration costs associated with the state convention, but a registration form is required.
- Hotel room at the convention rate as indicated on the event registration form.

All other MA UPMA members meeting eligibility for State Convention reimbursement:

- Early registration for all members will be set at \$49 if postmarked by the date indicated on the registration form. At the conclusion of the state convention, the registration fee will be returned to all MA members that attended and fully participated in convention activities.
- Partial registration will be set by meal selections as indicated on the event registration form.
- There will be a \$20 daily business session fee without meals.
- Hotel room at one half (1/2) the convention rate as indicated on the event registration form.

National Convention:

- The MA Chapter may host a dinner for all MA UPMA members at the National Convention.
- The MA Chapter will make a donation to the national office for door prize drawings in the amount requested by them.

National Convention Eligible Reimbursement for:

President
 Exec Vice-President
 Sec/Treasurer
 Editor
 Retiree President
 Any officer or chair when there is scheduled training for the position or when requested by the President to attend.

- Early registration as indicated on the event registration form (March 31, 2025).
- Airfare transportation if required, up to 10% over the Sec/Treasurer due to departing point. All flight documentation must include an itemized itinerary showing the departing/arriving airports, times of flights and amount paid, excluding any travel points used.

- One luggage fee each way if applicable.
- For members that drive, mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer with all receipts and mapping/mileage documentation.
- Hotel room at the convention rate as indicated on the event registration form.
- Up to \$75 with receipts for departing airport parking or for combined transportation to and from the departing airport to include parking at Logan express, bus tickets, rideshares, etc. There will be no mileage reimbursement to and from the home base airport.
- UPMA or hotel provided transportation to hotels must be used if provided. Any required charges for UPMA provided transportation will also be reimbursed with receipts. If no UPMA or hotel transportation provided, rideshares, buses, taxis, etc will be reimbursed up to a maximum of \$100 for this event. Members are expected to carpool to the extent possible.

All other MA UPMA members meeting eligibility for National Convention reimbursement:

- All expenses outlined above with the exception of the hotel room.
- Hotel room at one half (½) the convention rate as indicated on the event registration form.

ATLANTIC CONFERENCE:

- All transportation reimbursements including hotel parking fees are subject to change by vote of the Executive Committee based upon location of the Conference.

Atlantic Conference Eligible Reimbursement for:

President

Exec Vice-President

Sec/Treasurer

Editor

Retiree President

Any MA Executive Board member with a scheduled training class for their position, holding an Atlantic Conference elected position, conducting a training class, or authorized by the President.

- Early registration as indicated on the event registration form.
- Airfare if authorized, up to 10% over the Sec/Treasurer due to departing point. All flight documentation must include an itemized itinerary showing the departing/arriving airports, times of flights and amount paid, excluding any travel points used.
- One luggage fee each way if applicable.
- Driving, if authorized includes mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer or documented expenses with all receipts and mapping/mileage documentation.
- Hotel room at the conference rate as indicated on the event registration form.
- Up to \$75 with receipts for departing airport parking or for combined transportation to and from the departing airport to include parking at Logan express, bus tickets, rideshares, etc. There will be no mileage reimbursement to and from the home base airport.
- UPMA or hotel provided transportation to hotels must be used if provided. Any required charges for UPMA provided transportation will also be reimbursed with receipts. If no UPMA or hotel transportation provided, rideshares, buses, taxis, etc will be reimbursed

up to a maximum of \$100 for this event. Members are expected to carpool to the extent possible.

All other MA UPMA members meeting eligibility for Atlantic Conference reimbursement:

- All expenses outlined above with the exception of the hotel room.
- Hotel room at one half ($\frac{1}{2}$) the convention rate as indicated on the event registration form.

NATIONAL UPMA ACADEMIES/MEETINGS:

- The President will authorize members to attend National UPMA Academies/Meetings.
- Transportation expenses will be reimbursed at the most cost effective means based on location and decided by the President.

National UPMA Academies/Meetings Eligible Reimbursement for:

President
Exec Vice-President
Sec/Treasurer
Editor
Retiree President

- Registration fee.
- Airfare if authorized, up to 10% over the Sec/Treasurer due to departing point. All flight documentation must include an itemized itinerary showing the departing/arriving airports, times of flights and amount paid, excluding any travel points used.
- Driving if authorized includes mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer or documented expenses with all receipts and mapping/mileage documentation.
- Hotel room at the nationally contracted rate.

All other MA UPMA members meeting eligibility for National Academies/Meetings reimbursement:

- All expenses outlined above with the exception of the hotel room.
- Hotel room at one half ($\frac{1}{2}$) the convention rate as indicated on the event registration form.

The fiscal policy will be effective January 1 – December 31. It will be reviewed and amended annually by the Executive Committee no later than November 1. Presentation and a quorum vote of the Executive Board will be held no later than December 31 each year.

This fiscal policy was proposed by the MA UPMA Executive Committee and approved by a quorum vote of the MA UPMA Executive Board at a meeting held on November 14, 2024.