



**MASSACHUSETTS CHAPTER OF THE
UNITED POSTMASTERS AND MANAGERS
OF AMERICA**

FISCAL POLICY EFFECTIVE JAN 1 – DEC 31, 2024

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 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 \$7.50 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, the previous year's regional area treasurer report, meeting minutes and Baystater articles.

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

The following E-Board members will have the below listed expenses reimbursed to attend the Legislative Summit. A specific voucher with all receipts and mapping/mileage 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 Legislative Summit. This is defined as being in attendance at all President mandated events from beginning to end. MA UPMA members who receive compensation for the Legislative Summit from national reimbursements are not entitled to MA Chapter reimbursements.

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.
- For members that drive, mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer.
- One luggage fee each way if applicable.
- 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 and returning airports 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 provided transportation, rideshares, buses, taxis, etc will be reimbursed up to a maximum of \$100 for this event.

Legislative Fund - All other MA UPMA members may request reimbursement as outlined below. A specific voucher with all receipts and mapping/mileage 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 Legislative Summit. This is defined as being in attendance at all President mandated events from beginning to end. MA UPMA members who receive reimbursement for the Legislative Summit, be it national reimbursements or in accordance with the current MA Chapter bylaws or fiscal policy will not receive any monies from this fund thereby allowing the distribution to more members. Any eligible reimbursements in excess of the available legislative funds will be distributed from the MA Chapter checking account in 2024.

- 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.
- For members that drive, mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer.
- One luggage fee each way if applicable.
- Hotel room at one half ($\frac{1}{2}$) 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 and returning airports 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 provided transportation, rideshares, buses, taxis, etc will be reimbursed up to a maximum of \$100 for this event.

State Convention - The following E-Board members will have the below listed expenses reimbursed to attend the State Convention. A specific voucher with all receipts 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 State Convention. This is defined as being in attendance at all President mandated events from beginning to end.

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

- Hotel room at the convention rate as indicated on the event registration form.
- There will be no registration or transportation costs associated with the state convention.

All other MA UPMA members may request reimbursement as outlined below. A specific voucher with all receipts 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 State Convention. This is defined as being in attendance at all President mandated events from beginning to end.

- 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.
- Full registration after the early registration date will be \$99, with no reimbursement.
- 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.
- Full non-member registration will be set at \$150 or partial registration will be set by meal selections as indicated on the registration form.

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 MA members only.

National Convention - The MA Chapter may host a dinner for all MA UPMA members at the National Convention.

The following E-Board members will have the below listed expenses reimbursed to attend the National Convention. A specific voucher with all receipts and mapping/mileage 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 National Convention. This is defined as being in attendance at all President mandated events from beginning to end. MA UPMA members who receive compensation for the National Convention from national reimbursements are not entitled to MA Chapter reimbursements.

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, 2024).
- 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.
- For members that drive, mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer.
- One luggage fee each way if applicable.
- 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 and returning airports 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 provided transportation, rideshares, buses, taxis, etc will be reimbursed up to a maximum of \$100 for this event.

All other MA UPMA members may request reimbursement as outlined below. A specific voucher with all receipts 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 State Convention. This is defined as being in attendance at all President mandated events from beginning to end.

- Early registration as indicated on the event registration form (March 31, 2024).
- 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.
- For members that drive, mileage, tolls and hotel parking will be reimbursed up to the airfare of the Sec/Treasurer.
- One luggage fee each way if applicable.
- Hotel room at one half ($\frac{1}{2}$) 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 and returning airports 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 provided transportation, rideshares, buses, taxis, etc will be reimbursed up to a maximum of \$100 for this event.

Atlantic Conference (if scheduled) - **The following E-Board members** will have the below listed expenses reimbursed to attend the Atlantic Conference. A specific voucher with all receipts 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 Atlantic Conference. This is defined as being in attendance at all President mandated events from beginning to end.

President

Exec Vice-President

Sec/Treasurer

Editor

Retiree President

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

- Early registration as indicated on the event registration form.
- Hotel room at the conference rate as indicated on the registration form.
- Transportation reimbursement, including hotel parking fees, will be determined by the Executive Committee based on location.

National UPMA Academies/Meetings – The President will authorize and register members to attend National UPMA Academies/Meetings. A specific voucher with all receipts and mapping/mileage 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 any academies/meetings. This is defined as being in attendance at all President mandated events from beginning to end. Transportation expenses will be reimbursed at the most cost effective means based on location and decided by the President.

- If airfare transportation is authorized, all flight documentation must include an itemized itinerary showing the departing/arriving airports, times of flights, and amount paid.
- If driving is authorized, mileage reimbursement will include the cost of tolls and parking.
- Hotel rooms are covered by the national office. If this changes, the MA Chapter will reimburse hotel room charges only.
- \$60 per diem will be allowed for the training day minus \$15 for any meal provided by UPMA. Members may submit a dated receipt for up to \$30, (no alcohol) for a meal not provided by UPMA for the training day.

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 October 26, 2023.