



# New York Chapter of UPMA Empire State Publication

Volume 2024 / Issue 4

July/Aug/Sept 2024

## UPMA ATLANTIC CONFERENCE SEPTEMBER 26-29, 2024 ALBANY, NY

*Learn about :*

- *the new Postal Service Health Benefits*
- *Retirement options with expert  
Joni Montroy*
- *CRDO, CSV/SOV, CSAW/F2DPH*
- *Get reimbursed for Registration fee and  
hotel room.*

*See pages 28 and 29 for details*

**NATIONAL  
CONVENTION  
AUGUST 24-30, 2024  
CARIBE ROYALE,  
ORLANDO, FL  
BRING THE  
WHOLE FAMILY!!!  
\$1000.00  
Reimbursement**



**UPMA**  
United  
Postmasters  
and Managers  
of America

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# NEW YORK CHAPTER

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### 1st District Coordinator

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## Reflect on the Past, Understand Today and Set Achievable Goals

It is important to remember where you were in life yesterday, today and where you would like to be tomorrow. Have you ever set goals to achieve? If not, why not? You can't get further towards success in every aspect of your life without first knowing what success for you looks like. Take the time to reflect on your current situation, how you would like to change it or not and determine what you need to do or not to set yourself up for your happiness in life.

Our careers, our financial freedom, our day to day lives don't have to be what they are if they don't fit our goal of happiness. There are roads that lead us in just about any path we would like to take. Each road will have a different outcome and a different form of happiness. Take the time to analyze your life and set a path forward that gets you to your place of tranquility.

I'm by no means a counselor and don't wish to be. I look at many things that appear before me as either an opportunity for today or in the future, whether it is just for me, my family, my friends, my employees, my career, UPMA or USPS. When situations present themselves and you act on them, have you ever noticed what you take care of today leads to something else that must be done, that you couldn't do unless the previous situation had been taken care of? I find that this happens a lot. This is why you should never put off to tomorrow what can be done today. I know, sometimes that is hard to do.

Here is one situation that many of us always put off until it is upon us and then wonder what we can do to make it better. That shining light that we think keeps getting brighter and brighter each year

of our career but rarely ever figure out what are the fundamentals that will make it happen to provide that happiness we desire. Yes, I'm talking about your retirement somewhere in the future.

Retirement income and will it cover the expenditures you have going out, health insurance and how much should you have and what will it cover, Social Security income, TSP income, life insurance, etc. etc. Have you ever projected 5 or 10 years into the future and what each year's income will be when you retire? If you haven't, ask for an annuity estimate, set a goal for your TSP to be at an amount so you can draw out around 4% a year to maintain its base and get your Social Security estimate online. From these figures that you attain, you will know your base monthly income. When will these figures give you enough a month to survive and still be able to have extra to provide that happiness you desire?

I've learned since belonging to UPMA and our past organizations that combined, that we are a wealth of knowledge that has helped me grow in experience in so many fields. Whether being a carrier, supervisor, postmaster, executive board member or as a state president the connections that I have made have increased my knowledge base, have given me direction on retirement, insurance, representation and the protection of others and has now taken a course of guidance to our newest members. This organization with its membership growing rapidly, needs to continue to provide the teachings to our replacements and much sooner so they too can make the necessary decisions earlier in their career to get to those desired places of happiness and retire when they reach the minimum retirement age.

At the 2024 State Convention in Buffalo, we voted to have next year's convention in the Saratoga area, 2026 in the Thousand Island area and 2027 on Long Island. We, re-elected our Secretary-Treasurer, Dan O'Neil, to a second term, elected James Mosher as the Legislative Vice President and Kristine Lion as our Chapter Member Representative Vice President. The five districts have all turned over to new people with the 1<sup>st</sup> District being Morgan O'Connell, 2<sup>nd</sup> District Rachel Barber-Forest, 3<sup>rd</sup> District Matt Tracy, 4<sup>th</sup> District Jamie Uhlinger and 5<sup>th</sup> District Jennifer Hayes. Two years ago, only one of the above officers was an officer. Six of the eight were either very new members or have never been involved. Membership matters. Membership drives are essential. Educating our members is the key to a strong organization. If anyone is interested in helping in any way to keep us viable, don't wait for a call. Call or email me to express your interest as we will mentor you along the way.

Remember, we are the premier management organization. We offer the best representation. We are the most active organization that lives and breathes the same scenarios that you deal with every day. If you need answers, we work to get them. If you need a spokesperson to step in

and talk with upper management to resolve concerns, we are there for you. Did your pay increase substantially the last two years? It wasn't automatic. Working together with the Postal Service to solve their goals in turn, solves ours. That's why your management, to deal with all our organizational concerns from employees to logistics and produce the best outcome we can possibly get. All our futures depend on it.

Keeping focused daily on why we do what we do keeps us grounded. Think of when you started through your career progressions and what your salary was to start and where it is today. What did that salary provide and still provides for you and your family. If you feel otherwise, then just maybe it is time to rethink your future. If it still the right path, continue striving toward a healthy retirement. Producing negative thoughts only creates a downward spiral to early retirement, quitting or just the many different attributes that can affect your health. Your smile today and everyday no matter what the circumstances will positively affect others. Your frown everyday will only bring others down with you.

Dan Leonard

NY State President





## Associates Corner

### Helpful Hints to Assist You on Your Path to Success

How to do your **STAR** in your KSA's

**Situation/**

**Task:** Define what the situation/problem or task was.

**Action:** What did you do?

**Result:** What happened after your action

When you do each KSA you need to tell a story about a PARTICULAR situation or task that presented itself using STAR to tell the story. Describe the situation or task. Then the action you took to correct or resolve the particular situation.

For assistance with your KSA's, email [UPMAKSA@yahoo.com](mailto:UPMAKSA@yahoo.com). Please text 845-742-7774 when you email your KSA.

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## Quilts of Valor



Ben Johnston -  
US Air Force



Mike Silvestri -  
US Army



Keith Miner -  
US Army &  
Airborne



Randy Sliker-  
US Coast Guard



Robert Maruschak - US Army & Reserves

See page 38  
for more info





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## UPMA NY BUDGET 2024 Year to date

TOTAL GENERAL FUND	Jan 1 2024	INCOME TOTAL	EXPENSE TOTAL	Jun 3 2024
BEGINNING SAVINGS	110898.55			110981.97
BEGINNING CHECKING	29538.98			47294.59
CD	109453.36			112359.29
LEGISLATIVE BALANCE	529.55			529.63
OUTSTANDING CHECKS	200			3306.52
OUTSTANDING CHARGES VISA	1283.18			660.14
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	248937.26	0.00	0.00	267198.82
TOTAL SPECIFIED ACCOUNTS		INCOME TOTAL	EXPENSE TOTAL	
SCHOLARSHIP BURGER \$45K Base				
SCHOLARSHIP JENNISON \$4K Base				
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	0.00	0.00	0.00	0.00
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Budget	Actual	Budget	Actual
INCOME SAVINGS/CHECKING/VISA	2023	2023	2024	2024
DUES WITHHOLDING	160000.00	128104.13	160000.00	66216.54
DUES CASH	1300.00	832.18	1300.00	
INTEREST SAVINGS	1000.00	2874.03	3000.00	83.50
INTEREST CHECKING				
STATE CONVENTION INCOME/ Atlantic Conf	8000.00	2733.48	10000.00	1450.00
VISA REWARD REBATES	400.00	310.00	400.00	189.43
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	170700.00	134853.82	174700.00	67939.47
EXPENSE CHECKING	Budget	Actual	Budget	Actual
	2023	2023	2024	2024
OUTSTANDING CHECKS	0	200.00	0.00	
NEW CHECKS ORDERED	100	122.36		
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			0.00	
EXPENSES GENERAL FUNDS	Budget	Actual	Budget	Actual
OFFICER EXPENSE BREAK DOWN	2023	2023	2024	2024
PRESIDENT				
TRAVEL/MEALS	500.00	392.05	100.00	180.80
POSTAGE	200.00		200.00	65.30
SUPPLIES	500.00	149.90	700.00	1031.92
SECRETARY-TREASURER - Bond	500.00	500.00	750.00	500.00
CONTRACT	1200.00	3675.70	4000.00	
TRAVEL/MEALS	200.00		200.00	
POSTAGE	500.00	66.00	500.00	68.00
SUPPLIES	200.00	83.23	200.00	
EDITOR	15000.00	6859.75	13000.00	13347.38
POSTAGE	5000.00	2000.00	5000.00	2000.00
SUPPLIES	100.00		100.00	
WEBMASTER - OFFICE EXPENSES	500.00	264.99	500.00	294.99
VICE PRESIDENTS				
TRAVEL/MEALS	300.00	224.16	300.00	
POSTAGE	100.00		100.00	
SUPPLIES	100.00		100.00	
CHAPTER MEMBER REPS				
TRAVEL/MEALS	1000.00		1000.00	
POSTAGE	100.00		100.00	42.90
SUPPLIES	100.00		100.00	
SCHOLARSHIPS				
TRAVEL/MEALS	100.00		100.00	
POSTAGE	50.00		68.00	
SUPPLIES	50.00		50.00	79.80

ITEMS TAKEN OUT OF BUDGET LINE	1210.00			
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>27510.00</b>	<b>14215.78</b>	<b>27168.00</b>	<b>17611.09</b>
<b>EVENTS &amp; MISCELLANEOUS</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>
<b>CONFERENCE/MEETINGS</b>	<b>2023</b>	<b>2023</b>	<b>2024</b>	<b>2024</b>
MID WINTER/ FALL CONFERENCE	3000	5525.74	9900.00	1417.18
ATLANTIC CONFERENCE	7000.00	11545.38	20000.00	
CMR TRAINING AND CONFERENCE		7536.79	9500.00	357.05
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>10000.00</b>	<b>24607.91</b>	<b>39400.00</b>	<b>1774.23</b>
<b>LEGISLATIVE/LEADERSHIP</b>				
OFFICER EXPENSE	4000	4156.38	4000.00	6932.19
REIMBURSEMENTS	8000.00	6400	8000.00	11000.00
KICK OFF			<b>6000</b>	<b>764.04</b>
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>12000.00</b>	<b>10556.38</b>	<b>18000.00</b>	<b>18696.23</b>
<b>SWINGS</b>				
DISTRICT ANNUAL DISPURSEMENT	5000.00	7000.00	5000.00	1000
SPECIFIC EVENT DISPURSEMENT	4000.00		4000.00	
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>9000.00</b>	<b>7000.00</b>	<b>9000.00</b>	<b>1000.00</b>
<b>STATE CONVENTION</b>				
MEETING ROOMS	300.00		500.00	
FOOD SUPPLIED MEETINGS / WELCOMING	10000.00	5897.36	6000.00	
TRAINING AND GIFTS FOR PRESENTERS	200.00		200.00	
GUESTS COMP AND GIFTS NATIONAL REPS	600.00	138.42	1000.00	
DECORATIONS	500.00		500.00	
REGISTRATION GIFTBAG/ITEMS	500.00	378.06	500.00	
HOSPITALITY	500.00	894.45	1000.00	
AWARDS	500.00	255.98	500.00	
PRINTING	100.00	952.76	200.00	
BANQUET FOOD	4500.00	2500.00	5000.00	
OFFICER & APPOINTEE REIMBURSEMENTS	5400.00	4293.93	5100.00	
MEMBER INCENTIVES	8000.00	6786.92	5000.00	
ROOMS	16140.00	11834.20	18500.00	
ITEMS TAKEN OUT OF BUDGET LINE	7600.00	6902.11		
INCOME	5000.00	2633.48	4000.00	
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>49840.00</b>	<b>38200.71</b>	<b>40000.00</b>	<b>0.00</b>
<b>NATIONAL CONVENTION</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>
	<b>2023</b>	<b>2023</b>	<b>2024</b>	<b>2024</b>
INCENTIVES FOR MEMBERS	9250.00	15150.00	17000.00	
OFFICER & APPOINTEE REIMBURSEMENTS	15000.00	11370.24	20000.00	2284.32
STATE DINNER	1100.00	1251.45	1400.00	
FY24 REGISTRATION	1400.00	1635.00	1600.00	
xx XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>26750.00</b>	<b>29406.69</b>	<b>40000.00</b>	<b>2284.32</b>
<b>MEMBERSHIP</b>				
TRAVEL/MEALS	500.00		5000.00	1206.52
POSTAGE	800.00	1039.10	1000.00	
SUPPLIES	3000.00	4467.31	3000.00	
INCENTIVES MEMBERS	4000.00	3957.82	15000.00	3400.00
MEMBERSHIP TRAINING	1500.00	1059.03	10000.00	
INCENTIVES NEW MEMBERS	20000.00	17800.00	6000.00	210.00
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>29800.00</b>	<b>28323.26</b>	<b>40000.00</b>	<b>4816.52</b>
<b>MISCELLANEOUS</b>				
RETIRES APPROPRIATION	4500.00	4365.00	5000.00	4926.25
FLOWERS & CARDS & AWARDS	500.00	138.25	500.00	
PROFESSIONAL FEES (AUDIT)	200.00	99.90	300.00	399.90
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>5200.00</b>	<b>4603.15</b>	<b>5800.00</b>	<b>5326.15</b>
TOTAL EXPENSES		<b>156913.88</b>	<b>219368.00</b>	<b>51508.54</b>
TOTAL INCOME-TOTAL EXPENSES=NET INCREASE/DECREASE		<b>-22060.06</b>	<b>-44668.00</b>	<b>16430.93</b>

# UPMA NY BUDGET - 2023 Final Expenses

TOTAL GENERAL FUND	JAN 1 2023	INCOME TOTAL	EXPENSE TOTAL	Dec 31 2023
BEGINNING SAVINGS	135703.2			110898.55
BEGINNING CHECKING	31816.03			29538.98
CD	106774.84			109453.36
LEGISLATIVE BALANCE	529.39			529.55
OUTSTANDING CHECKS	3826.14			200.00
OUTSTANDING CHARGES VISA	0			1283.18
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	270997.32	0.00	0.00	248937.26
TOTAL SPECIFIED ACCOUNTS	JAN 1 2023	INCOME TOTAL	EXPENSE TOTAL	FEB 11 2023
SCHOLARSHIP BURGER \$45K Base				
SCHOLARSHIP JENNISON \$4K Base				
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	0.00	0.00	0.00	0.00
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX				
	Budget	Actual	Budget	Actual
INCOME SAVINGS/CHECKING/VISA	2022	2022	2023	2023
DUES WITHHOLDING	110000.00	115918.41	160000.00	128104.13
DUES CASH	1300.00	1205.10	1300.00	832.18
INTEREST SAVINGS	1000.00	961.17	1000.00	2874.03
INTEREST CHECKING				
STATE CONVENTION INCOME/Atlantic conf	2370.00	2287.00	8000.00	2733.48
VISA REWARD REBATES	400.00	450.35	400.00	310.00
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	115000.00	120822.03	170700.00	134853.82
	Budget	Actual	Budget	Actual
EXPENSE CHECKING	2022	2022	2023	2023
OUTSTANDING CHECKS	0	2592.84	0.00	200.00
NEW CHECKS ORDERED			100.00	122.36
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	0.00		100.00	
	Budget	Actual	Budget	Actual
EXPENSES GENERAL FUNDS	2022	2022	2023	2023
OFFICER EXPENSE BREAK DOWN				
PRESIDENT - Travel/Meals	500.00		500.00	392.05
POSTAGE	200.00		200.00	
SUPPLIES	500.00	149.90	500.00	149.90
SECRETARY-TREASURER - Bond	500.00		500.00	500.00
CONTRACT	1200.00	1200.00	1200.00	3675.70
TRAVEL/MEALS	200.00		200.00	
POSTAGE	500.00	60.00	500.00	66.00
SUPPLIES	200.00	938.94	200.00	83.23
EDITOR PRINTING	15000.00	8074.00	15000.00	6859.75
POSTAGE	5000.00	1524.37	5000.00	2000.00
SUPPLIES	100.00		100.00	
WEBMASTER - OFFICE EXPENSES	500.00	219.99	500.00	264.99
VICE PRESIDENTS				
TRAVEL/MEALS	500.00		300.00	224.16
POSTAGE	100.00		100.00	
SUPPLIES	100.00		100.00	
DISTRICT COORDINATORS				
TRAVEL/MEALS	500.00		500.00	
POSTAGE	100.00		100.00	
SUPPLIES	100.00		100.00	
CHAPTER MEMBER REPS				
TRAVEL/MEALS	1000.00		1000.00	
POSTAGE	100.00		100.00	
SUPPLIES	100.00		100.00	
SCHOLARSHIPS				
TRAVEL/MEALS	100.00		100.00	
POSTAGE	50.00		50.00	
SUPPLIES	50.00		50.00	
CONVENTION CHAIR				
TRAVEL/MEALS	200.00		200.00	
POSTAGE	10.00		10.00	
SUPPLIES	50.00		50.00	
BANQUET CHAIR				
TRAVEL/MEALS	200.00		200.00	
SUPPLIES	50.00		50.00	
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	27710.00	12167.20	27510.00	14215.78



<b>EVENTS &amp; MISCELLANEOUS</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>
<b>FALL / WINTER CONFERENCE</b>	<b>2022</b>	<b>2022</b>	<b>2023</b>	<b>2023</b>
REIMBURSEMENTS ATLANTIC CONF	3000		3000.00	5525.74
REIMBURSEMENTS FALL CONF/MID WINTER	7000.00	2654.98	7000.00	11545.38
REIMBURSEMENTS/ CMR TRAINING		835.65		7536.79
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>10000.00</b>	<b>3490.63</b>	<b>10000.00</b>	<b>24607.91</b>
<b>LEGISLATIVE/LEADERSHIP CONF.</b>				
OFFICER EXPENSE	3000	3850.57	4000.00	4156.38
REIMBURSEMENTS	7000.00	7200	8000.00	6400.00
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>10000.00</b>	<b>11050.57</b>	<b>12000.00</b>	<b>10556.38</b>
<b>SWINGS - FALL &amp; SPRING</b>				
DISTRICT ANNUAL DISPURSEMENT	5000.00		5000.00	7000
DISTRICT SPECIFIC EVENT DISPURSEMENT	4000.00		4000.00	
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>9000.00</b>	<b>0.00</b>	<b>9000.00</b>	<b>7000.00</b>
<b>STATE CONVENTION</b>				
SPECIFIC EVENT	6000.00	3750.00	6000.00	3456.50
MEETING ROOMS	300.00		300.00	
FOOD SUPPLIED MEETINGS / WELCOMING	4700.00	10853.55	10000.00	5897.36
TRAINING AND GIFTS FOR PRESENTERS	200.00		200.00	
GUESTS COMP AND GIFTS NATIONAL REPS	600.00	40.95	600.00	138.42
DECORATIONS	500.00	397.33	500.00	
REGISTRATION GIFTBAG/ITEMS	500.00	100.00	500.00	378.06
DJ	400.00	650.00	700.00	200.00
HOSPITALITY	500.00	654.17	500.00	894.45
LARGE PRIZES	450.00	394.59	450.00	151.48
DOOR PRIZES	250.00	79.86	250.00	309.11
PRESIDENT'S GIFTS	0.00		0.00	
AWARDS	500.00	466.92	500.00	255.98
FLOWERS OFFICERS	200.00		200.00	
RAFFLE TICKETS PURCHASE	0.00		0.00	
PRINTING	100.00		100.00	952.76
BANQUET FOOD	4500.00	4890.46	4500.00	2500
OFFICER & APPOINTEE REIMBURSEMENTS	5400.00	2978.09	5400.00	4293.93
INCENTIVES FOR MEMBERS	8000.00	5557.20	8000.00	6786.92
SPECIFIC EVENT INCENTIVE		500.00		2785.02
OFFICER COMPED ROOMS	16150.00	6243.60	16140.00	11834.20
INCOME	5000.00	2287.00	5000.00	2633.48
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>44250.00</b>	<b>35269.72</b>	<b>49840.00</b>	<b>38200.71</b>
<b>NATIONAL CONVENTION</b>	<b>Budget</b>	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>
	<b>2022</b>	<b>2022</b>	<b>2023</b>	<b>2023</b>
INCENTIVES FOR MEMBERS	9200.00	6100.00	9200.00	15150.00
SPECIFIC EVENT INCENTIVE	50.00	50.00	50.00	
OFFICER & APPOINTEE REIMBURSEMENTS	19650.00	9786.09	15000.00	11370.24
MEETING ROOMS	0.00		0.00	
STATE DINNER	1100.00	753.25	1100.00	1251.45
HOSPITALITY	0.00		0.00	
FY23/24 REGISTRATION	1400.00		1400.00	1635.00
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>31400.00</b>	<b>16689.34</b>	<b>26750.00</b>	<b>29406.69</b>
<b>MEMBERSHIP</b>				
TRAVEL/MEALS	500.00		500.00	
POSTAGE	800.00	539.15	800.00	1039.10
SUPPLIES	500.00	166.66	3000.00	4467.31
INCENTIVES MEMBERS RECRUITING	1500.00	1346.11	4000.00	3957.82
MEMBERSHIP TRAINING	0.00	1667.77	1500.00	1059.03
INCENTIVES NEW MEMBERS	1000.00	8700.00	20000.00	17800.00
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>4300.00</b>	<b>12419.69</b>	<b>29800.00</b>	<b>28323.26</b>
<b>MISCELLANEOUS</b>				
RETIRES APPROPRIATION	5500.00	4560.00	4500.00	4365.00
FLOWERS & CARDS & AWARDS	500.00	162.94	500.00	138.25
PROFESSIONAL FEES (AUDIT), TAXS	200.00	200.00	200.00	99.90
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>6200.00</b>	<b>4922.94</b>	<b>5200.00</b>	<b>4603.15</b>
TOTAL EXPENSES		<b>96010.09</b>	<b>170200.00</b>	<b>156913.88</b>
TOTAL INCOME-TOTAL EXPENSES=NET INCREASE/DECREASE		<b>24811.94</b>	<b>500.00</b>	<b>-22060.06</b>

# Voting Results from State Convention

Voting Sheet for 2024 State Article and Bylaw Changes	
<b>Bylaws Change #2 Article I section 1 Subordinate units</b>	
The subordinate units of this organization shall be known as Districts, which are a make-up of County or Multi-County Associations.	
I vote for adoption of this change	10
I vote for rejection of this change	0
<b>Bylaws Change #3 Article V Elections of officers</b>	
Add (In the event a State Officer retires or leaves the USPS during the final year of their term, they may remain on to fulfill their term.)	
I vote for adoption of this change	10
I vote for rejection of this change	0
<b>Bylaws Change #4 Article VI District Coordinators</b>	
District Coordinators should entice and work with the County Officers to set-up District meetings.	
(a) Confer with the Vice President that will serve as the Chapter Member Representative Chair on matters pertaining to their respective Districts.	
(b) Contact all county and multi-county organizations periodically by attendance at county meetings.	
(c) Call a district meeting at least twice a year for the purpose of advising the district membership of progress within the state and for maintaining communications, between the counties and the state.	
(d) Assist the members in their districts in all endeavors.	
(e) Attend all meetings required by the President.	
I vote for adoption of this change	9
I vote for rejection of this change	1 - Ab JTB
<b>Bylaws Change #5 Article VIII President</b>	
Add - The president shall be bonded as provided in Article XVI.	
I vote for adoption of this change	10
I vote for rejection of this change	0
<b>Bylaws Change #6 Article XI Secretary Treasurer</b>	
The secretary-treasurer shall be bonded as provided in Article XVI hereof and shall receive such compensation for their services as the executive committee may provide.	
I vote for adoption of this change	10
I vote for rejection of this change	9

<b>Bylaws Change #7 Article XVI Bonds</b>	
The secretary-treasurer and President shall be required to be bonded in the amount deemed sufficient by the executive committee, said bond to be executed by a surety company approved the executive committee and the premium on such bond shall be paid by the chapter.	
I vote for adoption of this change	10
I vote for rejection of this change	0
<b>Bylaws Change #8 Article XX Committee's</b>	
1. Bylaws and Fiscal Policy - Up to five members which consist of the Bylaws and Fiscal Policy Chair, President, Executive Vice President, Secretary-Treasurer, and immediate past President.	
I vote for adoption of this change	10
I vote for rejection of this change	0
<b>Bylaws Change #9 Article XXII Order of Business</b>	
Section 1. The Order of Business at any state convention or other meeting of this Association shall be:	
(a) Call to Order	
(b) Invocation then Pledge of Allegiance	
(c) Roll Call of Officers and Board Members	
(d) In no order Reports of Officers and Committees, Elections, Bylaw voting, training, etc.	
(e) Reports of Officers	
(f) Reports of Committees	
(g) Unfinished Business	
(h) New Business	
(i) Open Forum	
(j) Election of Officers	
(k) Benediction	
(l) Adjournment	
I vote for adoption of this change	10
I vote for rejection of this change	0
<b>Bylaws Change #1 Article XXIII - BUDGET</b>	
The total of the budget shall not be exceeded by 5% except by the consent of two-thirds of the Board of Directors.	
I vote for adoption of this change	10
I vote for rejection of this change	0

## National Bylaws Voting Results from State Convention

Convention Year: 2024 Article: I, Section 3 (a)

Description: To change the language regarding the dues amount of members of UPMA Retired, Postmaster Reliefs and Associate members.

Rationale: Currently the dollar figure is stated in these Bylaws, which requires reprinting every time the dues are changed. This change would state that the dues are set by the National Executive Board and if they are changed, that change would be published in the UPMA Leader.

Submitted By: Daniel Helms, Minnesota Chapter; Jeffrey Lightner, Pennsylvania Chapter, John Douds, Delaware Chapter; Jim Maher, Missouri Chapter

To amend UPMA Bylaws, Article I, Section 3 (a): By striking the figure \$68.76 and adding the language: as set in the UPMA Membership Policy. Any dues changes shall be published in the UPMA Leader.

Existing Provision	Provision With Proposed Changes
Article I, Section 3 (a) The annual membership dues for UPMA Retired, Postmaster Reliefs and Associate members shall be \$68.76.	Article I, Section 3 (a) The annual membership dues for UPMA Retired, Postmaster Reliefs and Associate members shall be <del>\$68.76</del> as set in the UPMA Membership Policy. Any dues changes shall be published in the UPMA Leader.

YEA: 10  
NAY: 0

Received 1/23/2024  
Articles and Bylaws Committee unanimously recommends adoption, February 6, 2024.  
National Executive Board voted unanimously to concur with the recommendation of the committee to adopt this proposed change.

Convention Year: 2024 Article: V Sec 11 a)

Description: Remove imperative to take income from reserve fund for operations

Rationale: Allows greater investment flexibility

Submitted By: Padric Fisher Oregon Chapter, Greg Nors Texas Chapter, C Scott Christiansen Washington Chapter

To amend UPMA National Bylaws, Article V Sec 11 a) by replacing the word "All" with "Any", the word "shall" with "can" and adding the word "then" after and

Existing Provision	Provision With Proposed Changes
Article V SECTION 11 This Organization has established a reserve fund; a) The National Executive Board shall have the responsibility, duty and authority to determine how the monies in this fund shall be invested so as to yield the greatest return at the least possible risk. All income derived from the investment of this fund shall be paid into the treasury of and shall be available for use to defray the annual cost of conducting the affairs and business of this Organization. b) None of the monies placed in this fund may be withdrawn or expended for any reason without the consent and approval of two-thirds of the members of the National Executive Board. c) The National Executive Board, at its discretion, shall determine the size of the fund.	Article V SECTION 11 This Organization has established a reserve fund; a) The National Executive Board shall have the responsibility, duty and authority to determine how the monies in this fund shall be invested so as to yield the greatest return at the least possible risk. <del>All</del> Any income derived from the investment of this fund <del>shall</del> can be paid into the treasury of and then shall be available for use to defray the annual cost of conducting the affairs and business of this Organization. b) None of the monies placed in this fund may be withdrawn or expended for any reason without the consent and approval of two-thirds of the members of the National Executive Board. c) The National Executive Board, at its discretion, shall determine the size of the fund.

Received 1/31/2024  
Articles and Bylaws Committee unanimously recommends adoption, February 6, 2024.  
National Executive Board voted unanimously to concur with the recommendation of the committee to adopt this proposed change.

YEA: 7  
NAY: 3

Convention Year: 2024 Article: II, Section 4(b)

Description: To define when chapters can host their chapter convention.

Rationale: With the deadline for the submission of proposed article and bylaw changes being February 1<sup>st</sup> and with our annual Legislative Summit normally happening in the spring months of February or March, it is important that chapters have as much information available regarding the organization before holding their conventions.

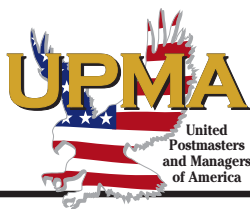
Submitted By: Tony Leonardi, Florida Chapter; Katie Evertsen, Utah Chapter; Jeff Jarrett, Indiana Chapter

To amend UPMA Bylaws, Article II, Section 4(b): by adding the language "on, or after April 1<sup>st</sup>"

Existing Provision	Provision With Proposed Changes
Article II, Section 4 (b) Hold an annual chapter convention;	Article II, Section 4 (b) Hold an annual chapter convention on, or after April 1 <sup>st</sup> .

Received 1/24/2024  
Articles and Bylaws Committee unanimously recommends adoption, February 6, 2024.  
National Executive Board voted unanimously to concur with the recommendation of the articles and bylaws committee to adopt this change.

YEA: 10  
NAY: 0



JOIN TODAY  
EAS GET ONE YEAR  
FREE

# Form 1187

Request and Authorization for Voluntary Allotment  
of Compensation for Payment of Employee Organization Dues

*Fill Out Form On-line, Print it out, and Return to  
UPMA National Office at the Address Below for Processing*

## Section A: All New Members Complete

USPS Employee Identification Number (EIN)	Social Security Number	Date of Birth	Gender Male <input type="checkbox"/> Female <input type="checkbox"/>
Name (PRINT Last Name, First, MI)		Contact Telephone	
Home Address (Street and Number/Box)	City	State	ZIP+4
Personal E-mail Address			

**Section B (Check One):** ☐ Postmaster ☐ Manager/Supervisor ☐ Associate ☐ PMR

Position	PO/City/State/ZIP
Post Office/Work Telephone Number	Pay Schedule Level
Post Office/Home Payroll Office Finance Number	Designation Code

## Section C: For Use by the Employee Organization



Mail completed form to: **United Postmasters and Managers of America (UPMA)**  
**8 Herbert Street**  
**Alexandria, Virginia 22305-2600**

**Visit the UPMA website [unitedpma.org](http://unitedpma.org) for membership benefit information.**



## Section D: Authorization by Employee

I hereby authorize the above-named agency to deduct from my pay each pay period the amount certified above as the regular dues the (UN-P) United Postmasters and Managers of America (UPMA) and to remit such amounts to that employee organization in accordance with its arrangements with my employing agency. I further authorize any change in the amount to be deducted that is certified by the above-named employee organization as a uniform change in its dues structure.

I understand that this authorization is a pay periods deduction. It will become effective the first pay period, following its receipt in the employee organization's headquarters office: UPMA, 8 Herbert Street, Alexandria, VA 22305-2600.

I further understand that revocation forms Standard Form No. 1188, "Revocation of Voluntary Authorization for Allotment of Compensation for Payment of Employee Organization Dues" are available from my employing agency and that I may revoke this authorization at any time by filling such a revocation form or other written revocation request by "Certified Mail" directly to the employee organization's headquarters office: UPMA, 8 Herbert Street, Alexandria, VA 22305-2600. Such revocation will not be effective, however, until the first full pay period following March 1 or Sept. 1 of any calendar year, whichever date first occurs after the revocation is received in the employee organization's headquarters office.

Signature of Employee

Date

## Section E

☐ Check this box to signify you've read and understood the terms in Section D of this form.

**Who/what most influenced your decision to join UPMA?**

Person's Name

☐ Career Awareness Conference ☐ USPS Provided Training ☐ Other

**UPMA NATIONAL OFFICE FOR PROCESSING**

Revised 12/2017 INT





Mary Dillon  
Retired PM  
Alexandria Bay



Bylaw Chairperson  
C: 315-771-5073  
paynelaker@gmail.com

## **BYLAWS OF THE NEW YORK CHAPTER OF THE UNITED POSTMASTERS AND MANAGERS OF AMERICA, INC.**

**Adopted June 8<sup>th</sup>, 2024**

### **Preamble**

The purposes for which this Chapter is organized as a part of national organization, United Postmasters and Managers of America (UPMA), shall be to provide a vehicle through which members may assist one another in matters connected with their employment in the United States Postal Service; to foster a favorable image of public service; to assure the users of the mails the best service possible improve the conditions under which individuals work, having concern for salaries, hours of employment, working environment, and related issues; to cooperate with other groups and levels of postal management in the achievement of common goals.

### **Article I – Name**

This organization shall be known as the New York Chapter of the United Postmasters and Managers of America Inc.

#### **Article I Section 1 Subordinate units**

The subordinate units of this organization shall be known as Districts.

The purpose of this organization shall be to affiliate with and become a part of the national UPMA organization.

### **Article III – Membership**

Any person as designated by the UPMA Governing Documents to be a member of the national Organization shall be considered a member in this Chapter but no member in arrears for dues shall be recognized or permitted any of the privileges at its conventions.

### **Article IV – Meetings**

The annual convention of the organization shall be held prior to the National Convention. The location will be chosen by geographical areas of interest where potential sites will be solicited. The Executive Boards will determine the location within the geographical areas by potential contract solicitations.

Special meetings may be called by the president and shall be called on the request in writing by a majority of the executive committee or on demand in writing of ten (10) percent of the paid-up membership of this chapter.

The chapter secretary/treasurer shall mail notice of meetings to members of the executive committee at least ten (10) days prior to the date specified for such meetings or 5 days electronically.

In any convention of this chapter, all members who are present and registered for the convention shall constitute a quorum.

Robert Rules of Order shall govern the deliberations of this chapter except where any provisions of this Bylaw document are inconsistent or in conflict with Robert's Rules of Order; then, this Bylaw document shall prevail.

### **Article V – Election of Officers**

#### **Article V – Election of Officers**

The officers of this chapter shall be a president, executive vice president, a secretary/treasurer, the immediate past president (who shall serve for a term of two years beginning at midnight the day after close of the National Convention and will end at midnight the day after the National Convention closes of the year a newly elected president shall assume office), the president of the UPMA retired, who together with the four vice presidents, shall constitute the executive committee, and the governing body of the chapter. The president shall be elected at the annual convention to serve a term of two years. Three vice - presidents which will be the Executive Vice President, PAC VP and Educational VP shall be elected the same year and serve a term of two years. The vice presidents of

Adverse Action and Legislation along with the Secretary/Treasurer shall be elected at the annual convention in a subsequent year to serve a term of two years. The term of office shall commence the following day after close of the National Convention and will end at midnight the day the National Convention closes. The position for which an officer is elected shall be limited to two consecutive terms of office. Vice President (VP) positions will be voted on by specific position title as Executive VP Membership, VP Educational, VP PAC, VP Chapter Member Representative and VP Legislative.

If there are no candidates for a position the current officer will remain in office until the next state convention election turn over date or appointment by the Executive Board is made.

In the event a State Officer excluding the President and or Executive Vice President retires from the USPS without it being discipline related during the final year of their term, they may remain on to fulfill their term.

If in any year the State Convention is held and officers are elected and the National Convention is cancelled, all elected officers will take office the following day the National Convention would have ended. If the State Convention is cancelled all officers will continue until the next State Convention in which all elected officers take office according to the above paragraph.

#### **Article VI District Coordinators**

District Coordinators will serve the districts that currently exist according to the District Map and be nominated and elected for two-year terms every odd year and be sworn in. They will take office at close of the Swing meeting elected at. District Coordinators are not voting members of the Executive Board but will be required to attend the three Executive Board meetings for member information and audit purposes which are the Executive Board meeting held within the first 120 days of office and pre-and post-convention boards. District Coordinators that can't attend an Executive Board meeting should designate an alternate representative for them.

(a) Confer with the Vice President that will serve as the Chapter Member Representative Chair on matters pertaining to their respective Districts.

(b) Call a district meeting at least twice a year for the purpose of advising the district membership of progress within the state and for maintaining communications.

(c) Assist the members in their districts in all endeavors.

(d) Attend all meetings required by the President.

#### **Article VII**

#### **REPRESENTATION & VOTING AT STATE CONVENTION**

Voting will be done by one vote per active member present, with the exception of Time and Place and Dues structure where all members present can vote.

All members must be registered and present at the Convention to be considered to be nominated and voted on for any position. Any exception to this rule must have had an announcement published in the ESUPMA or a letter to the President emailed or hand delivered by them as their intent to run prior to the start of the Convention.

Additional or other nominations shall be made from the floor, if seconded and approved, and shall be included with the list of recommendations made by the nominating committee for determining by ballot, of those present and qualified to vote in said election. If there shall be more than two nominations for any office, balloting shall continue until one candidate receives a majority of the votes cast.

If there is a tie vote for any position, the position will be decided by a separate Executive Committee session where a majority vote will decide. If there still is a tie after this the President or (Executive Vice President if in the capacity of acting President) will cast the deciding vote.

With the exception of the positions of President and Executive Vice President, which shall be limited to active EAS members in good standing of the organization, retired Postmasters, retired EAS employees and Postmaster Reliefs shall be permitted to hold office in this chapter provided they are present at the meeting where the vote will be taken and that no other active EAS member seeks the office. Any active member who is an officer of this chapter, who

during their term shall resign or be removed for any cause whatsoever, from the position that qualified them for active membership, shall immediately become ineligible to hold office and their office shall be declared vacant. If there are no candidates to elect for the position of President or Executive Vice President and the position or positions are vacant the Executive Board will appoint a candidate or share the responsibility until the position can be filled.

If the Executive Board elects to have an Electronic or mail in option as well as in person, procedures for that will be followed as set up by the Executive Board.

#### **Article VII Section 1**

State convention registration fees charged UPMA Retired members shall be twenty-five percent (25%) less than such fees charged active Postmasters and guests and shall include all functions included for active Postmasters and guests.

#### **Article VIII – President**

The president shall preside at all meetings of the chapter, shall call special meetings when requested to do so as provided in Article IV. They shall also preside at the meetings of the executive committee and appoint all committees for the proper handling of the business of this chapter and in general perform such duties as may pertain to the office. The president shall receive such compensation for their services as the executive committee may provide. The president shall be bonded as provided in Article XVI.

#### **Article IX – Executive Vice President**

The executive vice president shall serve in the absence or disability of the president and work with the president as needed. This position will be voted on as the Executive VP, be a two-year position and must be an active member. Should the office of the president be vacated, the executive vice president will serve the remaining term. The remaining term of the vacant position of the executive vice president shall be filled by the executive committee. If there is no Executive VP to fill the position the Executive Board will appoint someone to fill the President's position or share the responsibility until the position can be filled.

In addition, the executive vice president shall serve as the Membership Chair for the chapter. It shall be their duty to promote membership for the organization and ensure that the chapter always has a strong membership. The executive vice president shall receive such compensation for their services as the executive committee may provide.

#### **Article X – At Large Vice Presidents**

The At Large Vice Presidents will be responsible for the following duties:

One Vice President will serve as Education Chair. It will be their duty to work with the President in aligning training that is deemed necessary and appropriate for the membership.

One Vice President will serve as the Legislative Chair. It will be their duty to handle legislative activity within the chapter.

One Vice President will serve as the Political Action Committee (PAC) Chair. It will be their duty to handle any PAC activities within the chapter.

One Vice President will serve as the Chapter Member Representative Chair. It will be their duty to work with all Chapter Member Representatives to properly represent the members and to assist the District Coordinators with their labor management concerns.

In the event of a vacancy in the vice-presidential position, the vacancy shall be filled by the executive committee.



## **Article XI – Secretary-Treasurer**

The secretary-treasurer shall combine the office of secretary and treasurer and shall perform all duties commonly incident to both offices. The secretary-treasurer shall be bonded as provided in Article XVI hereof and shall receive such compensation for their services as the executive committee may provide. The secretary-treasurer shall keep all records, record the proceedings of all conventions and meetings of the executive committee, deposit, withdraw and have custody of the funds of the chapter and shall be responsible to keep an accurate and complete account of the receipts, vouchers and membership. In the event of a vacancy in the position of secretary-treasurer, the vacancy shall be filled by the executive committee.

## **Article XII State Communication**

### **Section 1: Editor**

An editor shall be appointed by the executive committee. It shall be the editor's duty to publish the official newspaper ESUPMA (Empire State United Postmasters and Managers of America) of the NY Chapter of UPMA.

### **Section 2: Webmaster**

A Webmaster shall be appointed by the executive committee. It shall be the webmaster's duty to keep the official website of ESUPMA (Empire State United Postmasters and Managers of America) of the NY Chapter of UPMA current.

## **Article XIII – Executive Committee**

The officers of this chapter shall be a president, executive vice president, four at large vice presidents, a secretary-treasurer, the immediate past president who shall serve a term of two years beginning the following day after the National Convention of the year a newly elected president assumes office and the president of the UPMA Retired shall constitute the executive committee and the governing body of the chapter.

It shall be the duty of the executive committee to carry out the orders of the chapter as expressed in the convention, it shall have direct control of all business of the chapter and its affairs, it shall be the power of the executive committee to authorize necessary expenditures; to audit all accounts; approve the expenses of the executive officers and in general perform all the functions ordinarily attached to such committee.

The executive committee shall have the power to remove any of the States elected officers for good and sufficient reason by two-thirds vote of the committee. The President shall have the power to remove members in appointed or non-elected positions.

In case of vacancy of the Immediate Past President, the office shall remain unfilled until the next Past President is available.

In case there are equal number of voting members on the Board, a tie vote on any matter is considered defeated except as described in Article VII.

In the case of a vacancy of the UPMA Retired President, the UPMA Retired Executive Committee, shall appoint one of its members to fill the unexpired term.

Vacancies on the State Executive Committee Board shall be filled within 120 days from the effective date of vacancy excluding the past Presidents position as described above. A quorum of the State Executive Committee shall be a majority of the voting positions held.

Any tie in the vote, the president will make the determining vote for the replacement.

The new executive committee shall hold an organizational meeting within 120 days of when they take office.

#### **Article XIV – Sergeant-At-Arms**

At the opening of each convention the president shall appoint a master sergeant-at-arms and the necessary assistant sergeants-at-arms, and it shall be their duty to maintain order and perform such other duties as designated by the president.

#### **Article XV – National Convention Roll Call Voting Procedure**

At the annual Chapter Convention when preparing for roll call votes to be cast on amendments at the National Convention a vote shall be taken after discussion by a majority of raising of hands to determine the method to vote by being roll call, paper ballot or raise of hands. When preparing for roll call votes at the National Convention to be cast on elections a vote shall be taken by paper ballot. If the Executive Board votes to cancel the State Convention due to safety reasons or reasons beyond our control, a form of electronic or mail in vote may be used. If electronic or mail in vote is used an outside source may be used for verifying the vote. The results of the vote shall govern the procedure, by percentage, for how the Chapter's votes will be cast at the National Convention by the Chapter President or designee. The results of the votes will be listed in the official minutes of the Chapter convention. The Chapter President must send the results to the National Office within ten (10) days of the conclusion of the Chapter convention.

When preparing for roll call votes held at the National Convention on any additional candidates, conflicting amendments or items not available for consideration or a vote at a Chapters convention, those members in attendance at said National Convention, who are eligible to vote, shall caucus. The results of the vote shall govern the procedure, by percentage, for how the Chapter's votes will be cast by the Chapter President or designee.

#### **Article XVI - Bonds**

The secretary-treasurer and President shall be required to be bonded in the amount deemed sufficient by the executive committee, said bond to be executed by a surety company approved the executive committee and the premium on such bond shall be paid by the chapter.

#### **Article XVII – Dues**

The annual dues of the members of this Chapter shall be the same as provided in the governing documents of the national organization.

#### **Article XIII – Official Publication**

There may be established an official publication of this Chapter. The publication will be distributed to the membership and others. The official publication will be named - ESUPMA (Empire State United Postmasters and Managers of America). In addition, the Chapter may maintain a website and a Facebook account for the dissemination of information. The executive committee, as the governing body of the Chapter, shall have editorial control over the official publication(s).

#### **Article XIX – Amendments**

All proposed amendment(s) must be submitted in writing to the Chapter president at least sixty (60) days prior to the opening of the annual Chapter convention. The proposed amendment(s) shall be published in one or more ways using the State publication and or Website at a minimum prior to the convention. These bylaws may be amended at any convention of the chapter by a 2/3 vote of the delegates present and voting or if the State Convention is cancelled by 2/3 vote of the electronic returns, mail in vote returned or combination thereof. The Executive Board will decide the proposed method. Any proposed amendment(s) shall be read at one session of the convention or electronic meeting and voted on at a subsequent session with the opportunity to mail in their vote or electronically submit as the Executive Board had decided on the method. A deadline date would be imposed at that time depending on the current concerns of not having a convention. These amendment(s) shall become effective immediately upon the adjournment of the convention unless otherwise specified in the amendment.

When proposing changes, although not required, be sure to include all sections affected by the proposed change and why the change is needed. Show current writing and proposed writing.

## **Article XX Committee's**

The following temporary committees shall be appointed by the President:

### **1. Bylaws and Fiscal Policy – Up to five members**

Duties and responsibilities:

- (a). Solicit input from membership all during the year.
- (b). Hold meetings as necessary to consolidate and formulate.
- (c). Furnish a complete copy of Bylaws and Fiscal Policy to ESUPMA Editor within 30 days of the close of the annual Chapter Convention.
- (d). Present Bylaw and Fiscal Policy proposed changes to the President at least 60 days in advance of the State Convention in which they are to be considered.

### **2. Convention Time & Place - Up to five members.**

### **3. Nomination of Officers - Up to five members.**

### **4. Budget - Up to five members, of which the Secretary-Treasurer shall be one.**

### **5. Audit - Up to five members which will consist of one member from each District as designated by its District Coordinator, the Chairman of which shall be the Secretary-Treasurer. He/she shall let those members know at the beginning of the year the requirements for the mandatory Audits as described in Attachments A & B.**

### **6. Special Committees as necessary.**

## **ARTICLE XXI – SCHOLARSHIP CHAIRMAN**

The Scholarship Chairman shall have the responsibility and imagination for maintaining and overseeing the fund-raising efforts for the purpose of scholarships. The Chairman shall act in the capacity of Chairman and Advisor to the Scholarship Selection Committee. The Scholarship Chairman will be reimbursed for any direct expenses, such as, but not limited to, administrative and communication expenses, upon approval of the Board of Directors. The Scholarship Chairman would be an annual appointment made by the State President. The Chairman of Scholarship would act in that capacity throughout the course of the year and not be a temporary appointment for the purpose of convention.

The Chairman shall:

1. Coordinate and promote fund-raising efforts throughout the year and during State Convention.
2. Maintain any records pertaining to fund-raising.
3. Report to the Secretary-Treasurer.
4. Select a volunteer Committee to assist in fundraising efforts throughout the year and during the UPMA State Convention.
5. Assure the compliance of the awards and scholarship process according to the guidelines established by the Executive Board.
6. Have responsibility for the application process for any awards or scholarships to be presented by New York UPMA.

## **ARTICLE XXII - ORDER OF BUSINESS**

Section 1. The Order of Business at any state convention or other meeting of this Association shall be:

- (a) Call to Order
- (b) Invocation then Pledge of Allegiance
- (c) In no order Reports of Officers and Committees, Elections, Bylaw voting, training, etc.
- (d) Unfinished Business
- (e) New Business
- (f) Open Forum
- (g) Benediction
- (h) Adjournment

## **ARTICLE XXIII - BUDGET**

Section 1. The budget shall be in detail and shall itemize the various amounts for the several officers and committees and for State and National conventions. Items so budgeted shall not be exceeded without specific authorization of the President and the Secretary-Treasurer and disbursed on receipt of proper vouchers approved by the President. Section 2. The total of the budget shall not be exceeded by 5% except by the consent of two-thirds of the Board of Directors.

***"We can complain  
because rose bushes have thorns, or we  
can rejoice because thorn  
bushes have roses."  
Abraham Lincoln***

## **NEW YORK CHAPTER UPMA FISCAL POLICY**

Amended October 21, 2023

The purpose of the policy is to provide guidelines for those having responsibility for authorizing and accounting for funds, expenditures, and property of the New York Chapter of UPMA, and to provide for the routine review of such expenditures and procedures.

### **SECTION I - GENERAL POLICIES**

1. A financial Audit Committee consisting of the President, Secretary/Treasurer, District Coordinator, or representative from each of the five UPMA districts shall meet a minimum of once each year, at the pre-State Convention board meeting as set by the state constitution.
2. These audits are to include the financial statements and supporting documents from each month for Jan 1 through Dec 31 respectively. A list of audit requirements is included in Attachment A of this fiscal policy. The checklist will be completed, and members of the audit committee will sign off on the check list. The findings of the committee will be presented to the general membership at the meeting following the audit.
3. The State Secretary-Treasurer shall provide all monthly filings of reimbursement vouchers, receipts, and check stubs; VISA payments with vouchers and receipts attached; bank statements for the month for the applicable period, to the audit committee for the audit. An annual report, by budget category, is to be sent to the members of the State Executive Board. In addition, a copy of the UPMA budget for the current year and the prior year's financial report shall be published in the Feb. issue of the ESUPMA, or in an issue as soon thereafter as practicable.
4. In accordance with the state constitution the Executive Board shall have an annual audit conducted and taxes submitted by a Certified Public Accountant of recognized standing
5. A Budget Committee, of which the Secretary-Treasurer shall be one, will be appointed by the President. The committee will prepare an annual budget to be presented to the Executive Board and for approval by the Executive Board.
6. UPMA recognizes the Signature Federal Credit Union will be the depository for all chapter funds. Credit Union VISA cards will be issued to the Secretary-Treasurer and President for chapter expenses. At no time are the cards to be used for personal expenses, and receipts must be voucher secured and filed monthly to match any listings on the monthly statement.
7. The Secretary-Treasurer will give a stipend of up to \$3000.00 from the due's money to each of the five districts annually to conduct their business. No account at any time shall exceed the \$3000.00.
8. Any 3 digit/county meetings wanting to start up will be given a \$100 startup fee paid by the state. Must call President for monetary approval.
9. The Legislative reimbursement travel fund will be determined annually by the Executive Board.
10. Postmasters Retired: Recognizing the valuable contribution made by the Postmasters Retired to the chapter, an annual sum will be given to the Postmasters Retired organization in the amount of 50% of their 25% dues money received per active paying member, to aid them in their endeavors. This is determined by the Retiree Executive Board.

11. Retiree's State Convention registration fee will be set at 75% of actives registration fee

12. Committee expenses to be pre-approved by the committee chairman, the State President and Secretary-Treasurer. Chapter Member Representatives expenses are pre-approved by the Vice President Chapter Member Representative Chair, the State President and Secretary-Treasurer.

13. The financial audit will be conducted for each of the five districts at the pre-State Convention board meeting and anytime there is a change in District Coordinator position of a District. These audits are to include the financial statements and supporting documents from the past 12 months.

Attachment B will include a checklist to be followed and signed off when completed. Failure to complete the audit will prevent the payout of chapter assessment share for that district until this obligation is met.

14. The district monies are for the purpose of enhancing membership and legislative involvement. (Attachment C)

15. As stated in the New York State UPMA Chapter Bylaws: Individual items on the approved Budget shall not be exceeded without specific authorization of the Chapter President or Secretary Treasurer and disbursed on receipt of paper vouchers approved by the President. The total annual approved budget shall not be exceeded by more than 5% except by the consent of 2/3 of the Board of directors.

16. Violations of this fiscal policy will be reported by any member of the Executive Board to an ethics committee. The ethics committee will be selected annually, at the incoming board conference. It will be comprised of five members of the State Executive Board selected as follows: two members appointed by the state president and the other three members by random drawing of the remaining members of the State Executive Board. These members immediately will select a committee chair. This committee will be charged with investigating violations and reporting results to the State Executive Board for any necessary action. Necessary actions could include, but not be limited to, removal from an elected/appointed position, and/or monetary reimbursement.

### **SECTION II - REIMBURSEMENT**

1. Reimbursement of authorized expenses will be accomplished using a New York UPMA expense voucher (Attachment E) submitted to the Secretary-Treasurer within sixty (60) days of the event at which the expenses were incurred. Vouchers received later than 60 days will not be paid unless extenuating circumstances occurred, and the Executive Board approves the reimbursement.
2. Vouchers must be filled out completely with all heading information, and a signature to be considered valid. All required receipts and/or supporting documentation must accompany each voucher. Incomplete vouchers will be returned to the sender.
3. Districts should make the announcement of time & place of their district meetings in the ESUPMA. ESUPMA is the state communication tool sent to all members. In addition, the chapter website is available and will be utilized to post the same information. Notifications electronically may also be used in addition to the ESUPMA magazine. Or at each districts expense they may mail notifications.
4. Time and place committee: upon submission of a properly completed voucher, members of the time and place committee for state convention will be reimbursed for mileage and meals per fiscal policy (only) when making site visits to potential properties.
5. Local travel: when using your POV for authorized state travel the mileage reimbursement rate will be that of the USPS mileage rate per mile (rounded to the next penny).
6. Registration Fees: Paid in full for members authorized to attend events by President in writing and submitted with the voucher.

# NY UPMA Chapter Fiscal Policy (Continued from previous page)

7. Meals: Officers authorized for reimbursement of meals will be entitled to the limits of (\$20.00 breakfast, \$20.00 lunch, \$40.00 dinner). When a meal is provided at an event, that cost will be deducted from that day's allowance. Entertainment expenses are not included.  
8. Lodging: Rooms will be reimbursed for members entitled to this expense at the rate determined for the specific event and not to include maid tips or valet parking & tips.  
9. Transportation: When options for transportation are available, a cost comparison should be done, and the most economical mode of transportation will be used as the rate of reimbursement.

10. Equipment: The purchasing of equipment will be limited to memory devices, programming, and minor devices necessary for the business of conducting important state business.

## SECTION III –AUTHORIZED EXPENSES BY OFFICER AND EVENT OFFICERS:

### STATE PRESIDENT

1. Bond Fees
2. Development seminars
3. Travel and meals to District meetings, other than own.
4. Postage, supplies and travel necessary for conducting state business
5. Specific events as listed in this section

### SECRETARY-TREASURER

1. Bond fees
  2. Development seminars
  3. Travel and meals at meetings when representing the President
  4. Postage, supplies and travel necessary for conducting state business
  5. Specific events as listed in this section
  6. the Sec/Treasurer position will receive a payment of 3% of monthly dues, on a quarterly basis.
- When a new Sec/Treasurer takes office, payment is prorated based on time of service.

### EDITOR

1. Approved Development seminars
2. Postage, supplies and travel necessary for state business
3. Specific events as listed in this section

### WEB MASTER

1. Approved Development seminars
2. Postage, supplies and travel necessary for state business
3. Specific events as listed in this section

### EXECUTIVE VICE PRESIDENT Membership Chair

1. Approved Development seminars
2. Postage, supplies and travel necessary for state business
3. Specific events as listed in this section

### VICE PRESIDENT Education Chair

1. Approved Development seminars
2. Postage, supplies and travel necessary for state business
3. Specific events as listed in this section

### VICE PRESIDENT LEGISLATIVE CHAIR

1. Travel and meals at meetings with elected state and federal representatives
2. Approved Development seminars
3. Postage, supplies and travel necessary for state business
4. Specific events as listed in this section

### VICE PRESIDENT Chapter Member Representative Chair

1. Travel and meals at meetings with USPS representatives, UPMA members and Chapter Member Reps
2. Approved Development seminars
3. Postage, supplies and travel necessary for state business
4. Specific events as listed in this section

### VICE PRESIDENT PAC CHAIR

1. Approved Development seminars
2. Postage, supplies and travel necessary for state business
3. Specific events as listed in this section

### Chapter Member Representative EXPENSES

1. Travel, meals, postage and supplies necessary on a case-by-case basis as determined by the Chapter Member Representative Chair and / or State President

### Bylaws, Fiscal Policy Chair

1. Approved Development seminars
2. Postage, supplies and travel necessary for state business
3. Specific events as listed in this section

### SCHOLARSHIP CHAIR

1. Postage, supplies and travel necessary for state business
2. Specific events as listed in this section

### PARLIAMENTARIAN

1. Specific events as listed in this section

### DISTRICT COORDINATORS

1. Postage, supplies and travel necessary for state business
2. Specific events as listed in this section

### CONVENTION CHAIR

1. Postage, supplies and travel necessary for state business
2. Specific events as listed in this section

### EVENTS:

#### DISTRICT MEETINGS

##### District Coordinators (of that District)

1. Meals and mileage.
2. Lodging if more than 100 miles from home and as approved by President and Secretary-Treasurer

### All expenses

. President

### All expenses when invited by the President and required reports must be given

. Secretary-Treasurer

. Editor

. Web Master

. Executive Vice President (Membership Chair)

. Vice President (Education Chair)

. Vice President (Legislative Chair)

. Vice President (PAC Chair)

. Vice President (Chapter Member Representative Chair)

. Bylaws, Fiscal Policy Chair

### Incoming Board Conference

All expenses (reports and agenda items must be prepared and copies attached to vouchers for expenses to be paid). Projected agenda and expenditures for Jan 1 through Dec 31 of the following year.

. President

. Secretary-Treasurer

. Editor

. Webmaster

. Executive Vice President (Membership Chair)

. Vice President (Education Chair)

. Vice President (Legislative Chair)

. Vice President (PAC Chair)

. Vice President (Chapter Member Representative Chair)

. Parliamentarian

. District Coordinators or one designee per District Coordinator

. Immediate Past President

. Immediate Past Secretary-Treasurer 1 year

. Scholarship Chair

. Convention Chair

. Bylaws, Fiscal Policy Chair

. Any others invited by the President

## LEADERSHIP CONFERENCE

1. Hotel room night charges are to include for Leadership, the night before, nights during and the night after.

2. When potential officers are invited by the President for Leadership training, reimbursement of one night stay plus travel mileage and meals according to the mileage rate and meal rates will be afforded.

### All expenses

President

Secretary-Treasurer

Editor

Webmaster

Executive Vice President (Membership Chair)

Vice President (Education Chair)

Vice President (Legislative Chair)

Vice President (PAC Chair)

Vice President (Chapter Member Representative Chair)

Bylaws, Fiscal Policy Chair

Chapter Member Representatives

## LEGISLATIVE CONFERENCE

Any member not reimbursed by the State who attends the Legislative Conference shall be reimbursed per the travel fund determined at the incoming Executive Board Conference provided the member attends the pre-legislative meeting and all assigned Hill appointments.

### All expenses

President

Executive Vice President (Membership Chair)

Secretary-Treasurer

Editor

Web Master

Vice President (Legislative)

Vice President (PAC)

Vice President (Education)

## CMR Academy

### All expenses

President

All members desiring to be or CMR's continuing, food, travel per fiscal policy, and any hotel room National doesn't pay for.

## Membership Kick-off

### All expenses

President

Executive Vice President (Membership Chair)

Secretary-Treasurer

Any other member approved by the President. Substantial recruiting will be the criteria.

## ATLANTIC CONFERENCE

### All expenses

All officers and appointees

Any member not reimbursed by the State who attends the Atlantic Conference shall be reimbursed per the travel fund determined at the incoming Executive Board Conference.

## STATE CONVENTION

### All expenses

President



# NY UPMA Chapter Fiscal Policy (Continued from previous page)

Secretary-Treasurer  
Editor  
Web Master  
Convention Chair  
Registration Chair  
Hospitality Chair  
Executive Vice President (Membership Chair)  
Vice President (Education Chair)  
Vice President (Legislative Chair)  
Vice President (PAC Chair)  
Vice President (Chapter Member Representative Chair)  
Bylaws, Fiscal Policy Chair  
District Coordinator or one designee per District Coordinator  
Scholarship Chair  
Sergeant of Arms  
Parliamentarian  
Immediate Past President  
Immediate Past Secretary-Treasurer 1 year

Expenses for Chapter Member Representatives shall be Registration fee, travel to and from convention, parking, meals at fiscal policy prescribed rates and 50% of hotel room charge when both pre- and post- convention board meetings are attended. Any exceptions will be made at the executive board's discretion.

Reimburse registration fees for any first timer and their sponsor.

## NATIONAL CONVENTION

### All expenses

President (including one guest travel and registration)  
Secretary-Treasurer (including one guest travel and registration)

### All expense when invited by President to attend, and when participating in training or activities scheduled specific to their office at the convention

Editor  
Webmaster  
Executive Vice President (Membership Chair)  
Vice President (Education Chair)  
Vice President (Legislative Chair)  
Vice President (PAC Chair)  
Vice President (Chapter Member Representative Chair)  
Bylaws, Fiscal Policy Chair

## ATTACHMENT A

### NEW YORK CHAPTER AUDIT REQUIREMENTS

Checks - accounted for, on the appropriate monthly bank statement and have dual signature vouchers - complete, with receipts attached.

Transfers - complete, appear on appropriate bank statement and appear on the receiving account statement and presented at the State Convention pre-board meeting.

VISA statements correct and account for, all transfers to and from Visa account are accounted for on appropriate bank statement.

Last Independent Audit Date: \_\_\_\_\_

Audit Co: \_\_\_\_\_

Taxes Filed Date: \_\_\_\_\_

Bonds purchased Date: \_\_\_\_\_

Bond Company: \_\_\_\_\_

All the above requirements have been met and the following members are witnesses to this.

audit, dated: \_\_\_\_\_

Chairman of Audit: \_\_\_\_\_

Secretary-Treasurer: \_\_\_\_\_

## ATTACHMENT B

### New York Individual District AUDIT REQUIREMENTS

Checks: accounted for and appear on a monthly bank statement.

Vouchers - complete, with receipts attached.

Annual Reports presented at the State Convention pre-board meeting.

All the above requirements have been met and the following members are witnesses to this audit,

Dated: \_\_\_\_\_

Chairman of Audit: \_\_\_\_\_

District Coordinator: \_\_\_\_\_

## ATTACHMENT C

### Ideas for use of District Assessment funds:

A portion of these funds may be allotted for an incentive for the Legislative Conference.

Set supplemental amounts for travel incentives for travel to/from UPMA events or cost of meals at District events.

Supplement or Pay members meals at swing meeting for first timers, retirees, or the membership in general.

Supplement or Pay registration fees at UPMA events.

Provide training for district members (i.e.: printouts, guest speakers, memory tools for personal computers etc.).

Plan special events, such as a picnic or seasonal celebrations, for the purpose of membership drives.

Purchase of incentive items for first timers attending District meetings.

Congressional and Senatorial representatives hold local activities and as a district you may supplement the cost of your members attending and discussing UPMA issues with the Representative.

Flowers given at a max value of \$100.00 for any scenario requiring them.

**\* All ideas and money spent should first be presented to the membership of that District in the form of a motion made, discussed, and approved by the majority at a swing meeting, when possible.**

\*\*\*\*\*

## ATTACHMENT D

### NYS UPMA Scholarship Awards

#### 1. EDWIN D. JENNISON Sr. Memorial Scholarship

#### 2. Frank and Helen Burger Scholarship

3. **CD Interest** – We will renew the CD Jan. 20<sup>th</sup>, 2024, for the entire amount. It shall remain in place and continued to be rolled over at the best rate until January 2029 at such time any interest above the \$100,000 will be divided equally between the Burger and Jennison scholarships. Should we have to cash in the CD prior to the 5-year mark any available interest will be split between those same scholarships at that time.

#### EDWIN D. JENNISON Sr. Memorial Scholarship Award

The Edwin D. Jennison Sr. Memorial Scholarship is established in memory of Ed Jennison Sr., long time Postmaster of Milton NY. Ed served as President of the NYS Chapter and after retirement became President of the NYS Retiree Chapter.

Ed was involved with the Boy Scouts, Viebey Sutton Post #124, the Knights of Columbus, and the St. James Church, Milton.

We are proud to name this Scholarship Program in his honor.

The NY Chapter of UPMA awards scholarships to qualifying students.

Eligibility: The applicants must be the child or grandchild of an active or Retired Postmaster, Manager, Supervisor or Associate, who is a member of the UPMA. Applicant must be a high school graduate and accepted as a first-year student for fall admission to an accredited college, university or trade school.

The applicant must have a 3.0 Grade Point Average (GPA) over all including a 3.0 average for the last full year of high school.

Applicants must provide a transcript of their grades covering the most recent year of school.

Applicants must list and briefly describe awards and community service during their previous school terms. They will have to provide enough information that the committee will know what they were doing during their school term.

The applicant must provide the committee with a copy of their letter of acceptance from the college of their choice.

Advertisement and Selection: The scholarships will be advertised in the Empire State UPMA, and on the official web site for the NY UPMA.

A committee of three (3) will screen applications, judging on test scores, secondary school records, personal qualifications, and community involvement. Decision of the committee will be final.

\*Items must be included with application or application will not be considered

### The criteria for the funds of this scholarship are as follows:

1. Funds are to remain at a base minimum of \$4000.00 in which \$5000.00 was transferred from the general fund at the UPMA Fall Conference 2017
2. Funds will be built up through donations and raffles

\*\*\*\*\*

### Frank and Helen Burger Scholarship award

Eligibility: NY UPMA children or grandchildren of Postmasters or Postmasters retired who just graduated from high school in December or plan to graduate in June and are planning to attend college or a trade school are eligible to apply for a Frank and Helen Burger NY UPMA Scholarship award. NY UPMA children or grandchildren of Associate members are not eligible for this Scholarship.

All applications and other required documents must be postmarked by the application deadline.

Application must be accompanied by:

1. Student high school transcript
2. Personal resume' of scholastic activities, extracurricular activities, sports, employment history, community service, clubs, positions held, and awards or honors received.
3. Applicants personal statement. Please write a statement in which you discuss a personal experience or achievement in your life. Describe how it relates to your aspirations for your future.

Eligible student applicant must be a senior who will graduate or have graduated in December of the year prior to the date of this application year or will be a senior who will graduate in May/June of the application year.

### The criteria for the funds of this scholarship are as follows:

1. Base to be maintained at \$45,000.00 or above set by initial investments and donations. Any interest earned or additional money received unless otherwise specified can be used towards scholarship awards yearly.
  - a. Member initial donations and raffles \$10,000.00
  - b. Helen & Frank Burger donation \$20,000.00
  - c. Helen & Frank Burger donation \$15,000.00

## ATTACHMENT E

## NY UPMA Chapter Fiscal Policy (Continued from previous page)

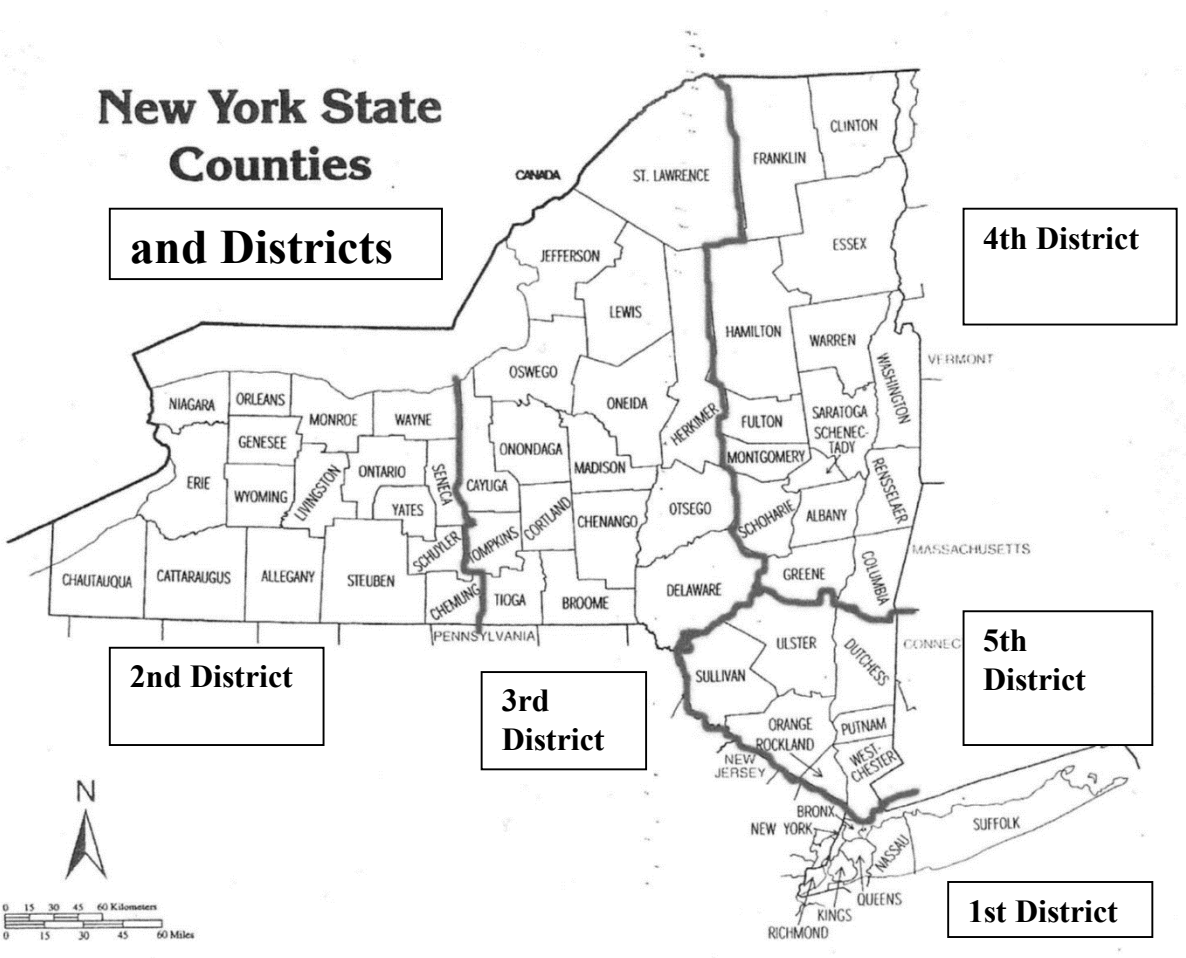
NYS UPMA STATE VOUCHER

**ATTACHMENT F**

NYS UPMA DISTRICT VOUCHER

**ATTACHMENT G**

District and County Map



### **District meetings:**

Each New York UPMA district is required to hold 2 district meetings each year. These are usually held in the spring and fall. The state president is usually invited and may bring other state officers. Updates about what is happening at state and national levels are provided at these meetings. At most of these meetings Postal District management is invited to attend and do presentations on important issues affecting the Postmasters and the Postal Service. These meetings are a great opportunity for those who cannot get away to attend overnight events to meet the officers and to see how UPMA operates.



Carol Commisso  
Retired PM Fishers  
11 Ambassador Dr.  
Victor, NY 14565



Scholarship Chair  
585-905-5164  
ccommisso12@gmail.com

It is my pleasure to introduce the recipients of the 2024 Frank and Helen Burger, and Edwin D. Jennison Jr. UPMA Scholarships. There were nine applicants to each fund, and the committee had a very difficult time choosing just three winners. All were worthy of an award, and I hope that someday our funds are so robust that we can give something to every student who applies.

These young people not only demonstrated academic excellence, but each one's extra-curricular activities including volunteering in some way in their community, and all of them expressed the desire to help others and give back. With so much negativity and divisiveness these days, it was refreshing and encouraging to see what these students are doing.

## 2024 SCHOLARSHIP WINNERS

**Frank and Helen Burger Scholarship winners each received \$1000.00**



Ty Sanges is the son of Michelle and Paul Sanges, and Paul is the Postmaster of Mayfield. Ty will graduate with honors from Fultonville High School and plans to attend Springfield College this fall, majoring in Communication and Sports Journalism. Ty's passion is running, both Cross Country, and Indoor and Outdoor Track and Field, and won the Section 2 Class C Boys Sportsmanship Award.

Zachary Roosa is the grandson of Jeanne Roosa, Postmaster Retired from New Hampton. Zachary will graduate from Monticello High School and attend SUNY Binghamton this fall. He is interested in a career in investing and finance. Zach is an IRS certified Volunteer Income Tax Preparer, and also logs over 150 annually as a volunteer fire fighter.



Alexander Linderman is the son of Rachel and Kristopher Linderman. Kristopher is the Postmaster of Olean. Alex will attend Brockport University and major in Geology. Working in the oil and gas industry is his back up plan if he can't fulfill his dream of becoming an astronaut. Alex also actively volunteers in his community.

# 2024 SCHOLARSHIP WINNERS

**Edwin D. Jennison Jr. Scholarship winners each received \$500.00**



Sarah Schafroth is the granddaughter of Martin Cropsey, Postmaster Retired of Wurtsboro. Sarah will graduate from Middleburgh High School and attend Russell Sage College in Albany this fall. She will major in Criminal Justice with the goal of becoming a defense attorney because she is passionate about safeguarding human rights and fair representation for all. Sarah is an accomplished athlete captaining the Varsity Softball and Basketball teams for the past three years.

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Michael Hanratty Jr. is the grandson of David Cook, Postmaster Retired of Westbury. Michael graduates from Commack High School and will attend Stonybrook University. He will major in Sociology and would like to go into law enforcement as several family members have. Working toward that goal he interned one summer at a law office. Both of Michael's letters of recommendation talked about his integrity, strong work ethic and dedication to learning.



Kaitlyn Hoy is the granddaughter of Kathy Hoy, Postmaster Retired of Sidney Center. Kaitlyn will attend Bryant College in the fall, majoring in Business. Kaitlyn would like to become a leader like her mother and feels that success in her field would give her more opportunities to help others. She currently volunteers with several local organizations and tries to make a difference in her community.

Thank you to all who donated to our scholarship funds this year, and to our UPMAR group who donate all the proceeds from their annual auction to our two funds and the national scholarship.

Carol Commisso,  
Scholarship Chair





Cathy Winnie  
PM Retired Accord 12404  
33 Cat Trail  
Williamstown, NY 13494



National Chapter  
Member Representative  
C: 845-742-7774  
cathywinnie@yahoo.com

## Laughter is the Best Medicine !

Laughing and networking has many benefits. It helps builds relationships, laughter can make you more open to new people and help you strengthen existing relationships.

Laughter can reduce stress and anxiety and give you a more positive attitude.

We saw that on full display at our UPMA State Convention in Buffalo. The blend of Postmasters, Supervisors, Sales and Retirees resulted in an energized group that was ready to teach and learn. Each group was a piece of the puzzle that makes up NY UPMA. But most of all we joked, laughed and learned with and from each other.

We started with our cocktail party to get our Convention started. It was a great icebreaker that brought every member together.

The presentations on NPA, CSV/SOV, F2DPH, PSHB, Adverse Action Avoidance, along with Legislative and PAC updates made for a jam packed agenda. We followed these up with our Retiree Auction with a Hippy 60's theme. The room was fun and full of laughter while raising money for our Scholarship funds.

We ended our Convention with our banquet and DJ. We all had a blast and ended the night in our Hospitality room where the fun and laughter continued.

To survive and flourish in today's Postal Service you need to have people you can network and laugh with. The benefits of additional information, networking, and laughing are immeasurable.

UPMA Conventions and District meetings give you an opportunity to establish and nurture work and personal relationships.

It is said people who laugh more often tend to live longer and have a better quality of life. May we all live to 100 based on this.

Plan on attending our next State Convention in Saratoga, our 2024 National Convention in Orlando or attend one of our UPMA District meetings in your area.

Victor Borge wrote,

"Laughter is the shortest distance between two people"

Let UPMA shorten the distance for you by getting involved. Join us for a meeting soon.

### THANK YOU!

Once again, a successful NY UPMA Convention is in the books! From officers, to members, and guests, you all play a part! Thank you for your contribution to Convention 2024, and hope to see you all again next year in the Saratoga area!!! Have a great and safe summer!!

Donna Jenness & Cathy Winnie  
Convention 2024 Co-chairs





Jennifer Hayes  
PM Grahamsville 12740  
153 Firehouse Rd.  
Wurtsboro, NY 12790



VP / PAC  
O: 845-985-7735  
C: 845-665-3896  
jenniferhayes1973@yahoo.com

The New York UPMA Convention that took place in Buffalo, New York this year was a great success! There was learning, sightseeing, dancing and games! I enjoyed myself immensely. I do hope that next year will be even a bigger turnout! We had a PAC table this year with games to play (Wheel of Fortune and Plinko), a 50/50 drawing each day and a raffle for a bouquet of flowers made out of money! After the payouts of our two 50/50 raffle winners, and adding in all the envelopes and donations, I'm proud to say, thanks to the generosity of you, that New York PAC

raised \$3943.00. Let's not stop there! UPMA PAC is only as strong as our membership and donations. We still need to increase our PAC fund so we can fight the good fight for our active and retired Postmasters, Managers, and Supervisors. UPMA PAC is our voice to fight for our existing and future members and the Postal Service! This can only be done by people like you and me, So, please don't stop giving. Let's all work together to create a voice that will be heard from far and near!  
**THANK YOU!**

**UPMA  
PAC**  
for  
Postmasters  
and Managers  
Member  
Voluntary  
Contribution  
Please send to:  
Jennifer Hayes  
153 Firehouse Rd.  
Wurtsboro, NY 12790

**Thank you for returning this form with your contribution.** Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**I'll do my share!** Enclosed is: \_\_\_\_ \$25 \_\_\_\_ \$50 \_\_\_\_ \$100 \_\_\_\_ \$200 Other: \$ \_\_\_\_

Name (please PRINT) \_\_\_\_\_

Home Address: \_\_\_\_\_  
Street Address/PO Box

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

My contribution is by (check one): ☐ Check ☐ Money Order ☐ Signature FCU Visa Credit Card

Please charge my contribution to the following 16-digit Signature FCU Visa Account Number: \_\_\_\_\_  
CVV# \_\_\_\_\_

Exp. Date: \_\_\_\_\_  
Signature (required for credit card charges)

Office use: ☐ Pin Received ☐ Active Postmaster ☐ Retired ☐ Associate State to credit \_\_\_\_\_

PAC for Postmasters and Managers will neither favor nor disadvantage anyone based on the amount of a contribution or the failure to make a voluntary contribution to this non-partisan political action fund.



### Proposed Change to the UPMA National Bylaws #1

Convention Year: 2024	Article: I, Section 3 (a)
<b>Description:</b> To change the language regarding the dues amount of members of UPMA Retired, Postmaster Reliefs and Associate members.	
<b>Rationale:</b> Currently the dollar figure is stated in these Bylaws, which requires reprinting every time the dues are changed. This change would state that the dues are set by the National Executive Board and if they are changed, that change would be published in the UPMA Leader.	
<b>Submitted By:</b> Daniel Heins, Minnesota Chapter; Jeffrey Lightner, Pennsylvania Chapter, John Douds, Delaware Chapter; Jim Maher, Missouri Chapter	

To amend UPMA Bylaws, Article I, Section 3 (a): By striking the figure \$68.76 and adding the language: as set in the UPMA Membership Policy. Any dues changes shall be published in the UPMA Leader.	
Existing Provision	Provision With Proposed Changes
Article I, Section 3 (a) The annual membership dues for UPMA Retired, Postmaster Reliefs and Associate members shall be \$68.76.	Article I, Section 3 (a) The annual membership dues for UPMA Retired, Postmaster Reliefs and Associate members shall be <del>\$68.76</del> as set in the UPMA Membership Policy. Any dues changes shall be published in the UPMA Leader.

Received 1/23/2024  
Articles and Bylaws Committee unanimously recommends adoption, February 6, 2024.  
National Executive Board voted unanimously to concur with the recommendation of the committee to adopt this proposed change.

### Proposed Change to the UPMA National Bylaws #2

Convention Year: 2024	Article: V Sec 11 a)
<b>Description:</b> Remove imperative to take income from reserve fund for operations	
<b>Rationale:</b> Allows greater investment flexibility	
<b>Submitted By:</b> Padric Fisher Oregon Chapter, Greg Nors Texas Chapter, C Scott Christiansen Washington Chapter	

To amend UPMA National Bylaws, Article V Sec 11 a) by replacing the word "All" with "Any", the word "shall" with "can" and adding the word "then" after and	
Existing Provision	Provision With Proposed Changes
<b>Article V</b> <b>SECTION 11</b> This Organization has established a reserve fund; a) The National Executive Board shall have the responsibility, duty and authority to determine how the monies in this fund shall be invested so as to yield the greatest return at the least possible risk. All income derived from the investment of this fund shall be paid into the treasury of and shall be available for use to defray the annual cost of conducting the affairs and business of this Organization. b) None of the monies placed in this fund may be withdrawn or expended for any reason without the consent and approval of two-thirds of the members of the National Executive Board. c) The National Executive Board, at its discretion, shall determine the size of the fund.	<b>Article V</b> <b>SECTION 11</b> This Organization has established a reserve fund; a) The National Executive Board shall have the responsibility, duty and authority to determine how the monies in this fund shall be invested so as to yield the greatest return at the least possible risk. <del>All</del> Any income derived from the investment of this fund <del>shall</del> can be paid into the treasury of and <del>then</del> shall be available for use to defray the annual cost of conducting the affairs and business of this Organization. b) None of the monies placed in this fund may be withdrawn or expended for any reason without the consent and approval of two-thirds of the members of the National Executive Board. c) The National Executive Board, at its discretion, shall determine the size of the fund.

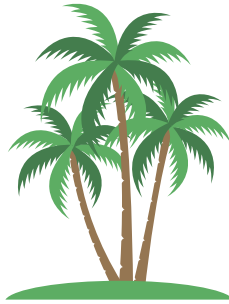
Received 1/31/2024  
Articles and Bylaws Committee unanimously recommends adoption, February 6, 2024.  
National Executive Board voted unanimously to concur with the recommendation of the committee to adopt this proposed change.

### Proposed Change to the UPMA National Bylaws #3

Convention Year: 2024	Article: II, Section 4(b)
<b>Description:</b> To define when chapters can host their chapter convention.	
<b>Rationale:</b> With the deadline for the submission of proposed article and bylaw changes being February 1 <sup>st</sup> and with our annual Legislative Summit normally happening in the spring months of February or March, it is important that chapters have as much information available regarding the organization before holding their conventions.	
<b>Submitted By:</b> Tony Leonardi, Florida Chapter; Katie Evertsen, Utah Chapter; Jeff Jarrett, Indiana Chapter	

To amend UPMA Bylaws, Article II, Section 4(b): by adding the language "on, or after April 1 <sup>st</sup> ."	
Existing Provision	Provision With Proposed Changes
<b>Article II, Section 4 (b)</b> Hold an annual chapter convention;	<b>Article II, Section 4 (b)</b> Hold an annual chapter convention <b>on, or after April 1<sup>st</sup>,</b>
Received 1/24/2024 Articles and Bylaws Committee unanimously recommends adoption, February 6, 2024. National Executive Board voted unanimously to concur with the recommendation of the articles and bylaws committee to adopt this change.	

# Join Us in Sunny Florida for the 8th UPMA National Convention



**UPMA<sup>8th</sup>**  
**NATIONAL CONVENTION**  
**AUGUST 24-30, 2024**  
 CARIBE ROYALE ORLANDO

**Lori McDonough**, 2024 National Convention chair

Make your plans now and register for this year's national convention in the Sunshine State at the spectacular Caribe Royale Orlando. Whether you come alone, bring a guest or your entire family, you will find the accommodations to fit all your needs. Save the dates, register to attend and reserve your fabulous suite at this luxurious resort today!

If you are an active first-timer,

you must pay your registration fee in advance. After attending the convention, you will need to submit a form to the National Office for reimbursement.

Once you have registered and made your reservations (see registration information below), scroll down to the "Orlando Discounts" link to plan your free time. Coming soon to [unitedpma.org](http://unitedpma.org) will be the conven-

tion agenda. I will provide information in future articles regarding what you need to know before you go, such as theme night, dress attire and more.

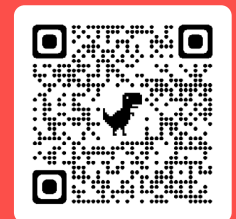
Until then, save the dates, register and reserve *today*! If you have any questions concerning the national convention, please contact [UPMA@crispevents.me](mailto:UPMA@crispevents.me).

## REGISTRATION RATES

	April 1 - June 30	After June 30
Postmasters/Managers/Supervisors/EAS Professionals/Associates/OICs	\$208	\$260
UPMA Retired or Guest	\$191	\$230
Guest/Spouse	\$156	\$195
Children 17 and under	\$80	\$80

To register for the 2024 National Convention, use the QR code to go directly to the convention registration page. You also can go to [unitedpma.org](http://unitedpma.org):

- Under "Events," click on "National Events"
- Click on "UPMA 8th National Convention"
- Once on the registration page, click on the "Register Now" tab



If you prefer to register by mail, you can download the registration form.

Information also is available to make your hotel reservation at the Caribe Royale. You can call the Caribe Royale to make your reservation or click on the "Book Online Now" tab.

Direct any questions to Crisp Meeting & Events, UPMA's meeting planner, at [UPMA@crispevents.me](mailto:UPMA@crispevents.me).

State Convention Pre-Convention Board Minutes  
6/6/24 Call to order: 5:47pm

Invocation: Heidi

Pledge of Allegiance

Acknowledgement of Past Presidents

Jeff Lightner: National VP East was recognized

Announcement of voting members

Joni Montroy to present at Atlantic Conference  
(retirement specialist)

Mid-winter minutes read by Dan O'Neil

Went over convention agenda

Reports from: President

Reviewed Fiscal policy worked with Mary Dillon

Budget from Dan O'Neil, letter from Van Meter  
financial review read

Jeff Lightner - Bylaw changes

Legislative from Kristine Lion, great turn out this year

Pac from Jennifer Hayes, have a great table ready to  
go

Pac raised during mid-winter: 955.00 plus a 2500.00  
donation

CMR from Cathy Winnie, need contact before  
discipline is given

Editor Heidi Freeman went over deadlines and  
looking for new printer

Convention going as planned from Donna Jenness  
and Cathy Winnie

Report from Carol Commisso, 6 scholarship winners  
were chosen, none could make it to the banquet

Retiree President Keith Miner is happy with donations  
for auction

All district Coordinators are having meetings again

Mary Dillion with bylaws and fiscal policy with Dan  
Leonard

Hospitality room in 1603-1604

No unfinished business

No new business at this time

Benediction from Heidi

Adjourned 7:17

Audits to follow meeting

Audits completed on State, Dist. 2,3,4,5

---

State Convention Minutes 6/7/24

Door prizes given before Call to order

Call to order at 8:16 AM

Invocation: Randy Sliker

Posting of the colors: Keith Miner

Pledge of Allegiance

Donna Jenness with convention announcements:  
50/50 for PAC and Scholarship

Welcoming remarks by president Dan Leonard, we  
have signed up over 200 people in last year

Need new people to step up

Past Presidents recognized

Atlantic conference in Albany Sept 26-29 at 4 points  
by Sheraton (we are hosts this year)

NY Retiree President Keith Miner: recognized  
Veterans in room, lapel pins for veteran's

National Veteran's project at National Convention is:  
Tunnels to Towers

Welcoming remarks from Patricia Groves, UPMA  
National Area 2 Rep

Liz F. introduced 11 first timers

Elected positions announced for National VP East

Stephanie Thompson: spoke to us and asked for our  
vote

Morty B: Not in attendance

To be voted on Sat.

Elected positions announced for National President,  
Tony Leonardi running unopposed-To be voted on  
Sat.

State positions up for election: VP Legislative, VP  
CMR, Sec/Treas - To be voted on Sat

Continued on next page

State Convention Minutes 6/7/24 (Continued from previous page)

State bylaws proposed -To be voted on Sat

Had a nice presentation from BCBS about PSHB 2025

State Convention Minutes 6/7/24 (Continued)

Large door prizes given out

National VP Atlantic area Jeff Lightner, Keynote speaker

3 National bylaws to be voted on Sat

UPMA Kick off Dallas: 01/18/25

UPMA Legislative: 3/16-19/ 2025

UPMA National: Dallas: 8/9-8/15 2025

Talked about possible places for National in 2026 and 2027, looks like San Juan, PR in 2026 and Indianapolis, IN in 2027

Break for the day at 2:50 PM

Cathy Winnie presentation on adverse action at 3:15PM

### **State Convention Minutes 6/8/2024**

Door prizes given out before main session

Call to order: 8:04 AM

Memorial Service

Motion: Dan L Article 4- Meetings, Seconded by Kristine L

38-Yes, 1 No, See Dan L By-Laws

Had a motion to have Convention in 3<sup>rd</sup> District, motion was rescinded, had vote for (area, city) for state convention.

Next year 2025 in Saratoga

2026 in the Finger lakes

2027 in Suffolk County

Hotel proposals for Saratoga due to Dan L by July 31

Hotel for Thousand Islands due to Dan L by Oct 15

Went over convention rules and needs, Dan L will send copy to members

There were 10 actives to vote for State by-laws

All 9 by law votes passed, see bylaws in this issue

CMR VP: Kristine Lion, voted in

State Convention Minutes 6/8/24 (Continued)

Legislative VP: James Mosher, voted in

Sect/Treas: Dan O'Neil, voted in

National VP vote: Stephanie Thompson, voted in, all 10 votes

National President: Tony L running unopposed, Voted in, all 10 votes

National By law changes: All passed, see sheets attached

Motion to destroy all ballots, passed and destroyed

Dan O'Neil presented audit report from 2023 and 2024 budget report

Kristine L. to accept report, second by Keith M.

Carol C: scholarships 18 applications in total, 3 Burger and 3 Jennison to be given out at banquet

Send donations at any time, both scholarships could use some funds

Keith M spoke about Quilts for Valor and the ceremony they had at retirees break out session

Kristine L, Legislative, had a great turn out, need to get bills to the floor

Heidi F: Send pictures and articles: email or questions just give a call

Maureen: Registration, 14 Actives, 1 Associate, 35 Retirees, 9 guests, 59 Total

Jennifer H: collected 1444.00 during convention for PAC, 4899.00 total for the year so far

Kristine L motion to adjourn, 2<sup>nd</sup> by Jamie M

Adjourned at 12:08 PM

Post Board meeting: 2:26 PM

Basically, just went over convention

Dan O made a motion to donate 500.00 to Tunnels to Tower Project. Seconded by Kristine. Passed





# MEMORIAL SERVICE



## Honor Roll 2024

Mary E. Converse	West Bloomfield	Joan Reynolds	Johnsburg
Julia Weed	Walker Valley	John M. Lunghi	Flushing
John "Jack" Radar	Greenwood Lake	Beverly Vigleone	Lakemont
John "Jack" Deshler	Chester	Paul Bauccio	Farmingdale
John Caparaso	Rock Tavern	John Lackaye	Millbrook
Martin Cavally	Millerton	Joan D. Dumas	Childwood
Robert Harrington	Pawling	Dolores Townley	Bullville
Walter R. Byrne	North Creek	Maybelle E. Renzi	Hughsonville
Francis "Frank" Bracco	Southold	Luke Romano	Central Islip
John Sullivan	Silver Creek		



First Timers continued from page 27

**Stephanie Thompson**, Postmaster of Girard, PA, a level 20. She has 31 years of service. Stephanie loves to travel and just saw Chris Stapleton in concert.

**Eileen Johnson**, retired Postmaster of Addison, did 22 years of service. She has 3 children and 7 grandkids. She and husband Henry now live in the Florida Keys where they do a lot of golfing and make high end furniture.

**Lynn Gardner** retired in October 2023. She was the Postmaster of Clinton. She had 27 years of service. Lynn has 3 kids and 4 grands. In 2010, at a NAPUS conference, she met her husband Ray. She is a ballroom dancer and does karaoke. Lynn likes to hike and is a member of the group, Tramps and Trails. She and Ray are going to be AZ snowbirds.

**Liz Forsell**, First Timer Chairperson - I enjoyed meeting all of these "new" attendees and look forward to next year

# First Timers at the State Convention



Wow, how awesome was that state convention in Buffalo!!

Very happy to report that we had 11 First Timers. So let's introduce them to the membership.

From left to right

**Matt Tracy** also known as "Dick Tracy", I think they are cousins. Matt is Postmaster in Lafayette an 18B, just south of Syracuse. He has 25 years with the Postal Service starting as a Syracuse City Carrier. When he has free time he enjoys yard work, using a chainsaw- I invited him for a visit!! He does a lot with his church and loves working with people. Matt is a veteran having served in the Army then switching to the Air Force.

**Dana Bragg** is the Postmaster of Tully an 18B. She has been with the Postal Service for 9 years starting out in Cazenovia as a CCA. Dana is married to her high school sweetheart. They have 3 children, all involved in sports and loves to watch them compete and will happily "Bragg" about their accomplishments.

**Lynn Garlipp**, Postmaster Retired of Honeyoye Falls is still working as a substitute TA in her school district. She considers herself a mover and shaker. She loves to golf and has even had a hole in one. She enjoys all types of crime shows and even attended Crime Com in Nashville.

**Michelle Piasecki** is the Postmaster of Elma often confused with Elmo, a level 18B. She is counting the days to retirement - about 525 days to go. She enjoys growing weeds in her garden and blames it on the weather. They closed her beloved Crittenden office and she cried because it was home.

**Sharri Lux** is the Postmaster of Boston an 18 office. Can you believe she works in Boston and not even a Red Sox fan. Well I'll be!! Oh it's Boston, NY. Sharri is married with two sons and is an avid Disney lover. She loves Dopey and Star Wars. Her favorite holiday is May 4th. Go figure! She also loves horror flicks, the more gore the better.

**Dominic Spadaro** visiting Area Rep for Retirees, retired as the Postmaster of Newport NC, but he is originally from Buffalo and he is a Bills fan. He worked 30 years at the Post Office. He has served the NC chapter in a variety of elected positions. He has been retired for 12 years. He has 2 children and 1 granddaughter, Sydney, who is the youngest Masters graduate of Meredith College. Dominic spends his free time boating and floating. He is a veteran having served 6 1/2 years in the Marines.

**Jeff Lightner** is the National VP of the Atlantic Area. He is from PA and is currently the Postmaster of Eldred a level 18. He hopes to retire in January of 2025.

**Patricia Groves** National Rep. for Retirees Area 2, is from Assonet, MA and was a member of the Rhode Island chapter. She has now moved to FL. Patricia did 32 years (at the PO), loves to travel and do theater.

Continued on previous page

# 2024 NY Atlantic Conference Agenda

## Thursday Sept 26<sup>th</sup>, 2024

5:00 - 8:00pm Registration  
8:00 - 10:00 pm Hospitality room

## Friday, Sept 27<sup>th</sup>

7:00-7:45am Breakfast  
7:30-8:30am Registration  
8:30 am -12:00pm General Session  
8:30am Call to Order  
8:31am Invocation  
8:32am Posting of the Colors  
8:35am Pledge of Allegiance  
8:37am Announcements  
8:40am Conference Rules  
8:45am Welcoming Remarks & Recognition of special guests – Dan Leonard  
8:50am National President Edmund Carley – welcoming remarks  
9:05am Atlantic Area Coordinator Chuck Narcisco – welcoming remarks  
9:10am PAC announcement John Doud  
9:15am Introductions USPS position and state, concerns having daily.  
9:40am Break  
9:55am Announcements  
10:00am Area Tony Impronto (tentative) CRDO programs and ways to improve, CSV/SOV ways to reduce to earned including complement, test pilots being run and where we are headed with potential time frames.  
12:00pm Lunch Provided  
1:00pm **BCBS PSHB 2025**  
2:00pm Bylaws proposed.  
2:15pm Basic representation procedures Rich Hui, Cathy Winnie  
3:30pm Break  
3:45pm CSAW/F2DPH reductions and understanding, actual program instruction.  
5:00pm Dinner – on your own  
8:00pm-10:00pm Hospitality room

## Saturday Sept 28<sup>th</sup>

7:00-7:45am Breakfast  
7:30-8:30am Registration  
8:30 am -12:00pm General Session  
8:30am Call to Order  
8:30am Appeals, reductions, adverse action procedures Rich Hui, Cathy Winnie  
9:45am Break  
10:00 **Retirement Seminar – Joni Montroy**  
12:00 Lunch provided.  
1:00pm Bylaw vote  
1:15pm Mitigations with consultative log Q&A  
1:30pm Membership  
2:00pm Incoming National President  
2:30pm 2025 Atlantic Area Conference, host state, ideas to present on, 1 day or 2, etc  
3:00pm Unfinished Business  
    New Business  
    Benediction,  
    Retiring of the Colors – Veterans  
5:00pm Dinner on own  
**Saturday/Sunday Check – Out *Travel Home Safely!***

This agenda is subject to change.



This year the **Atlantic Conference is in Albany, September 26th - 29th** with training days on the 27th and 28th, Below is the registration form with hotel information.

The Atlantic Conference consist of 13 states and the District of Columbia. Several dignitaries will be there to address us. It is NY's turn to host the event.

**The reimbursement rate is as follows:** You will be reimbursed for hotel room and registration after submitting a voucher attached with the hotel receipt. Two breakfasts and two lunches are provided. I will have vouchers to give out at the conference. \$75 registration refunded if attended. Room rate with tax is \$129. Your only cost after reimbursements mailed out later is your travel and meals not covered. **Officers and appointees are fully covered per the fiscal policy.**

**Reservation Four Points Hotel BY Phone: (855)-297-1429      Group Code: "UPMA Convention"**

Dan Leonard, State President



## UPMA Atlantic Conference

Sept 26th-29th, 2024

Albany, NY 12202

*Official Registration Form*

*Please complete one application per registrant*



First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

**Title:**

- ☐ Postmaster
- ☐ Supervisor
- ☐ Manager
- ☐ OIC
- ☐ Associate (Craft)
- ☐ Postmaster Retired
- ☐ Supervisor Retired
- ☐ Manager Retired
- ☐ Guest
- ☐ Auxiliary
- ☐ Veteran

First name (nickname for your badge): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone/s: \_\_\_\_\_

E-mail: \_\_\_\_\_

State Chapter: \_\_\_\_\_ / Position: \_\_\_\_\_

**Reservation Four Points Hotel**



**BY Phone: (855)-297-1429  
Group Code: "UPMA Convention"**

**Registration Fees:**

Registration fee; \$75.00

Includes two Breakfasts and 2 lunches.

**Tentative meeting times: Friday 8am-5pm, Sat 8am-3:30pm**

**Tentative Agenda; PSHB, Representing from Start to Finish, CSV/SOV and Postal Officials**

**Payment information:** Convention fee: \$ \_\_\_\_\_

Send check or money order payable to **NY UPMA**  
Mail to Dan O'Neil, 8 Ridge Terrace East, Canajoharie, NY 13317.

Questions: Call Dan Leonard at 607-398-8200 or  
email [nyupmadanleonard@gmail.com](mailto:nyupmadanleonard@gmail.com)



### **Four Points by Sheraton Albany**

3 Mount Hope Way

Albany, NY 12202

Contact hotel directly  
for reservations.

(855) 297-1429

Or

Use QR Code

Room rates each night:

114 USD per night + tax

Reservation deadline:

Last Day to Book:

August 26, 2024





One of several  
Mystery Boxes



Jo had her  
tickets ready

Last year the Auction raised \$1000, so the bar was set for me. My goal was to raise more than a thousand dollars. With everyone helping: cars were unloaded and items delivered to the auction room. Let the set up begin. WOW, over 130 items were displayed for ticket holders to try and win. In the end, #2697 was the big winner, right Betty!! Love ya.... Our total was \$1248.25 divided 3 ways to the 2 state scholarships and the National Retiree scholarship. A big thanks to those that helped set up, sold the tickets and those that pulled the numbers and delivering the goods.

Next year, let's get \$1300 or more. We can do it!

Liz Forsell, Auction Chairperson







James Mosher  
PM Addison 14801  
108 Steuben St.  
Addison, NY 14801



NY District 2 Coordinator  
O: 607-359-2136  
C: 607-742-7382  
JMosherUPMA@yahoo.com

Greetings,

At the NYS convention in Buffalo, I was elected to serve the next two years as your NYS VP Legislative Chair. I look forward to the opportunity to serve in this role.

If you missed this year's convention I want to encourage you to attend next year in Saratoga. It's a great way to network and get informed.

I hope you will all plan to join us next March in Washington for the National Legislative Summit.

Take the opportunity to help get our issues to Capitol Hill. Stay tuned for more information on that.



NY UPMA  
District 2 Meeting  
in Horseheads, NY



## NY UPMA ELECTION RESULTS

Secretary/Treasurer - Dan O'Neil  
VP/Chapter Member Rep - Kristine Lion  
VP/Legislative - James Mosher

Officers will take office on  
September 1, 2024

## National Convention Theme Nights

### Saturday night - Welcome Dance

50's 60's SOC HOP Get your poodle skirt and muscle shirts ready!

### Sunday - Welcome Reception Dinner

Semi-Formal Dance follows dinner

### Monday- States night

Dress up as your favorite Disney character



### Wednesday "Surf's Up-Let's Dance"

Sponsored by the retirees, but everyone is welcome!

### Thursday - Carribean Beach Party

Jimmy Buffet Tribute



Liz Forsell

Retired PM

Long Lake 12847



NYUPMAR VP

C:315-369-5053

lizzie13436@hotmail.com

What an awesome time shuffling off to Buffalo for the state convention! Once again, there were more retirees than actives attending, but the numbers were so much closer. 5 Veteran retirees were blanketed with a Quilt of Valor by a group Mary Lou Zerby belongs to. What a beautiful presentation and honor for Ben, Keith, Randy, Bob and Mike who dedicated his to his good buddies that did not come home. We were all moved to tears.

National convention is in Orlando in August. This year, the Veterans are collecting money

for Tunnel to Towers. Reach out to Keith if you want to contribute and will not be going to FL.

The Atlantic Conference will be held in Albany September 26-29<sup>th</sup>. Actives are encouraged to attend but retirees may also attend.

Everyone needs to choose a health care during open season. Don't miss out.

Legislative will be in March and best of all 2025 state convention will be in Saratoga Springs.

## Tunnel to Towers - T2T

There are several ways to donate to T2T foundation. We prefer you make a check payable to Tunnel to Towers, but mail the check to Louise Nix, Treasurer, UPMA Retired, 88 Rodney Nix Rd., Cleveland, GA 30528. She will log your contribution and forward the checks to insure they are added to our UPMA total. If you make a contribution other than sending a check to Louise, you need to let Louise know by email at [louisenix@yahoo.com](mailto:louisenix@yahoo.com). She will maintain a database to show total contributions from UPMA and our members. It is important for us to track your donations. We want to be able to see the impact of our members with our combined donations. Please consider donating no matter how large or how small. No one will know individual level of donation except Louise.

Also you can use the link: <https://dogood.t2t.org/UPMAVeteransProject24> or the QR Barcode.







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Greetings all!

I hope all of you are well as we prepare to enter the height of summer and that those of you who attended our State Convention in Buffalo got home safely.

I would like to take this opportunity to thank everyone who came to our convention and all of those who made it the success that it was. I believe we had 35 retirees, guests and 1 associate who attended. In no particular order- thank you Donna and Cathy for being amazing convention chairs, Sue Wilk for running the memorial service, Liz for doing a superb job with the first timers and with the auction (over \$1200 raised for scholarships, WOOHOO!), Dave and Mike for their incredible work with Legislative, Gerry for his usual stellar job as our Secretary Treasurer, Marti for keeping on top of membership, Maureen for Registration, Brenda and her crew with decorations and table treats, Deana with the Banquet, - and so many more. All contributed in their own way and I am grateful to each and every one who lent a hand or two, named or not. It was great to have two National Retired Area Reps. address our convention. Thank you Dominic Spadaro and Patricia Groves for your messages. As part of our business, we approved the bylaw amendment submitted by Dave Cook permitting additional terms for the Secretary Treasurer. Dave also gave a detailed presentation of HR82/S597 and WEP elimination. We also approved a \$250 donation to the national veteran project target organization Tunnels to Towers. A full



copy of the minutes of the meeting will be posted in a future edition of the ESP.

I would also like to send out a special thanks to MaryLou Zerbe for the incredible gift of quilts to our retired veterans. The workmanship and the time invested in creating the quilts made for a humbling presentation to our vets. I believe that everyone in attendance was also deeply touched by the ceremony. Many thanks to you for suggesting the presentation., your group of Western NY Quilters for their work in honoring veterans with their gift of time and craftsmanship and the Quilts of Valor program for making it all possible. I know I cherish my quilt.

I hope that everyone will consider attending the National Convention, this year to be held August 24-30 at the Caribe Royale Resort in Orlando FL. It is always a great time to get together with other chapter retirees for camaraderie and sharing of information. Although Florida weather can be challenging in the summer, I think this will be a great event. I hope to have as great of a turnout at national as retirees had at the state convention.

Please keep up the communication with our representatives and senators to get HR82/S597 to a floor vote.

Be safe, be well and on to Orlando!!!

As always, Thank You to our veterans. God bless.







Gerald Geddis  
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Cambridge, NY 12816



NYUPMAR Secretary Treasurer  
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## NYS Convention Retiree Meeting Minutes

The NYS UPMA annual Retiree meeting was called to order by President Keith Miner @ 8:49 AM on Saturday June 8, 2024. There were 31 retirees present. The posting of the colors was completed and the Pledge of Allegiance was led by Michael Silvestri, who also gave the Invocation. Welcoming remarks and introduction of special guests, officers and past presidents was given by President Keith. Special guests—National Area 2 rep, Patricia Groves and National Area 6 rep, Dominic Spadaro. Board members—Keith Miner, President, Marti Miller, Executive VP, Liz Forsell, VP and Gerry Geddis, Sec/Treas. Past Presidents—David Cook and Michael Silvestri.

A special presentation was given by Postmaster Retired, Mary Lou Zerby and her quilting partners Ruth and Barbara, from the Western NY Quilters for a cause. They recognized 5 retiree members who were Veterans and presented to them a Quilt of Valor and a certificate for their duty to the USA and to all Americans. The Veterans included—Ben Johnston, US Air Force, Robert Maruschak, US Army and Reserves, Keith Miner, US Army and Airborne, Michael Silvestri, US Army and Randy Sliker, Coast Guard. Dale Bernard and Dick Dalrymple were previously presented with a quilt and certificate.

A motion to waive the reading of the prior Convention minutes was made by Keith M and 2<sup>nd</sup> by Sue Wilk. All in favor, motion passed. Copies of the budget and finances were provided to attendees. Gerry Geddis went over the budget and

line items with the attendees. The balances as of June 4<sup>th</sup> were checking---\$5713.41 and Savings---\$8334.36, for a total of \$14,044.77 Motion made by Betty Berndt and 2<sup>nd</sup> by Marti M to accept budget. All in favor, motion passed. Gerry Geddis informed everyone that as of January 1, 2025, Signature credit union will start to impose a \$5.00 per month fee for a mailed hardcopy statement. Gerry brought up the idea that he could just print out the statement from the online accounts, saving the membership the fees. A motion was made by Liz Forsell and 2<sup>nd</sup> by Betty Berndt to have the Sec/Treas print out the statements. One member opposed. Motion passed.

Dominic Spadaro spoke on behalf of President Charley Peters. He serves at the OPM level for migration to the new PSHB health plan. There is a membership drive going on and you will be entered into drawings for signing up new members. Reach out to Kathy Frame with any questions. The National Convention is being held Aug 24th-30 in Orlando, Florida this year. Check for emails, the Website, the Leader, UPMA Gold and In the Mailbox to stay informed and up to date on all issues. Dominic also stated that there are 2 proposed amendments that will be voted on at National. 1- The leader is the official publication of UPMA and 2- Vote at State Convention for National Officers. He also stated that any proposed amendments to the Bylaws must be submitted 90 days prior to Convention.

Patricia Groves then remarked that Dominic

Continued on next page

## NYS Convention Retiree Meeting Minutes

Continued from previous page

covered everything that she had to say, adding that the Veterans quilts presented were beautiful and that no two were alike.

David Cook spoke on the Social Security fairness act bills including HR82 and S597. There has been a lot of action however no happenings. Numerous other bills have been delayed. He spoke on the 290 rule. If 290 sign on to a bill, it gets pushed forward more. He has received a great response from many elected officials. There is also a bill in Congress for FERS retirees to make COLA equal to CSRS. Dave continues to send out updated emails. Read them and stay informed. Cathy Winnie recognized Dave Cook and Mike Silvestri for their Legislative work done for retirees. She has received messages from all over the country commending them. Dave and Mike have been declared Champions for the Cause. President Keith also thanked them both for their Leadership and guidance.

Jeff Lightner, Postmaster and Atlantic Area VP thanked retirees for building the Postal Service and making it what it is today.

Total convention attendance was 59, including 15 Active members, 35 Retiree members and 9 guests.

Patti Bascom is the National candidate for UPMA Retired Secretary and Anita Pfiefer is the National candidate for UPMA Retired Treasurer. President Keith read letters that were sent to him from the candidates and also handed out rail cards with their information.

Unfinished Business—The Friday night Auction raised \$1248.25 to be divided equally among the 3 scholarships. Mary Lou Zerby informed everyone to nominate a Veteran to receive a quilt. Check out the website Quilts of Valor or the Western NY Quilters for a cause to nominate or make a

donation.

New Business—Time and place discussion. Location and changing of the Dates/Days and what we are actually going to be voting on. More clarification is needed. President Dan Leonard arrived to try to clear up confusion. He will go over it in more detail when our meeting ends and we return to general session. We also need to have more active members attend State Convention. Election of Officers—The Secretary/Treasurer is the only position up for election. Liz Forsell nominated Gerry Geddis and 2<sup>nd</sup> by Carol Commisso. No other nominations. Motion made by Liz Forsell to close nominations and 2<sup>nd</sup> by Cathy Winnie. All in favor. Motion passed. Motion made by Liz Forsell 2<sup>nd</sup> by Cathy Winnie for the President to cast 1 vote for Gerry Geddis for Secretary/Treasurer. All in favor. Motion passed. The proposed amendment that states there will be no term limits for the Secretary/Treasurer was read by Dave Cook. Dave Cook made a motion 2<sup>nd</sup> by Mary Lou Zerby for the proposed amendment to pass. Discussion on motion. One member opposed. Motion passed. Motion made by Dave Cook 2<sup>nd</sup> by Ben Johnston for NY UPMA Retired to donate \$400 to Western NY Quilters for a Cause. All in favor. Motion passed. Motion made by President Keith 2<sup>nd</sup> by Dick Dalrymple for NY

UPMA Retired to donate \$250 to the Tunnels to Towers(T2T) fund , the National Veterans Project this year. All in favor. Motion passed.

Benediction by Mike Silvestri and Retire the Colors by Dick Dalrymple. Motion made by Keith Miner 2<sup>nd</sup> by Liz Forsell to adjourn the meeting. All in favor. Motion passed. Adjournment at 10:42 AM.



## Important information on the Special Enrollment Period for UPMA retirees

What you need to know about the Special Enrollment Period If you are a retiree and entitled to Medicare Part A as of January 1, 2024, and did not enroll in Part B, you and your covered, eligible family members may be able to participate in a **Special Enrollment Period (SEP)**. The one-time SEP runs April 1 through September 30, 2024. If you qualify for this SEP, you should have received a notification from USPS by April 1. This notification has more information about how to enroll in Medicare Part B during SEP. Those who choose to enroll in Part B during SEP will **not pay any late enrollment penalty**—this will be covered by USPS. If you have misplaced the notification letter mailed to you or believe that you are eligible to participate in the Postal Service Health Benefits (PSHB) Program and did not receive a notification letter, please contact the PSHB Navigator Help Line's toll-free number at [833-712-PSHB \(7742\)](tel:833-712-PSHB) or email [retirementbenefits@usps.gov](mailto:retirementbenefits@usps.gov). Want to know more about PSHB? Stay in the know.



### FORM 1187-R

Request and Authorization for Voluntary Allotment of  
Compensation for Payment of Employee Organization Dues

Please complete and mail to:

UPMA National Office  
8 Herbert St.  
Alexandria, VA 22305-2600  
(703) 683-9027

\*OPM assigns the CSA number to all Civil Service and FERS annuitants and/or surviving spouse

Social Security Number

			-			-				
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My Annuity Number is:

CSA

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Name of Retired Employee (PRINT Last Name, First, Middle)		Date of Birth	
Street and Number/PO Box		City	State ZIP+4
Month/Year Retired	Home or Cell Number ( )	Gender Male _____ Female _____	Chapter
Email Address		Sponsored by:	

Note: If not receiving an annuity contact National Office for information on membership.

### SECTION A – Authorization

The United States Office of Personnel Management is authorized to make an appropriate deduction from my annuity payments, not to exceed the amount certified by the **United Postmasters and Managers of America (UPMA)** as the amount of dues for which I am obligated, and to pay the deducted sum to **UPMA**. This authorization shall apply to any and all dues changes certified by **UPMA**. This authorization shall be valid until **UPMA** receives and processes my written notice of cancellation in accordance with its agreement with the United States Office of Personnel Management. Any disputes regarding this allotment authorization shall be a matter between **UPMA** and me; I hold the United States Office of Personnel Management harmless for any erroneous deductions made pursuant to this authorization.

I also request the United States Office of Personnel Management to disclose any information necessary to execute this request.

Signature	Date:
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Our New York UPMA Convention is in the books and now we are looking forward to our National Convention in Orlando. It was sad that there were so many who couldn't get to the convention because of coverage problems. We had less than twenty actives and over thirty retirees. It was a very nice convention. It was well planned, and the food was very good. The meetings run by President Dan Leonard of the Actives and President Keith Miner of the Retirees went well.

Our retiree meeting had a very special presentation by Mary Lou Zerby and two other quilters. Mary Lou gave information on each of the Veterans who then received a quilt made by the ladies. (There were two other veterans who had previously received their Quilt of Honor.) The retirees donated money toward the Quilter organization for supplies to make more quilts.

We also recognized Michael Silvestri for doing 50/50's at lunches in the First District. This money was raised for scholarship funds. Dave Cook was recognized for his excellence in Legislative information. Dominic Spadaro commended Dave Cook for always being on top of legislative action as it applies to UPMA. Cathy Winnie was also praised for her information on our new PSHB plan.

The best part of conventions is, as I've said before, being together with old friends. 1987 was my first New York convention and I have only missed

one due to surgery. When I was still working, it was a big help to get the information to help me do a better job. Now we are still learning things, but it's different.

As the Executive Vice President for the retirees, I am working on membership. I had sent letters to those whose names I was given. Now the retirees are using new postcards. If anyone knows people who have dropped their membership, please let me know. I do get names from Kathy Frame, but I haven't known the people on the list. If you know someone, it's easier to address. I can use your help.

For me this was a very special convention. I received the Lifetime Achievement Award. I was listening as Sue Wilk was saying what this person has done and thinking someone had done some of the things I had done. I didn't realize it was me until she said, "This person is the current Executive Vice-President of the Retirees". I was stunned. I never thought I had done anything to deserve the award. Truthfully, I still can't believe it really happened. All I can say is "Thank you from the bottom of my heart".





I had planned to go to the State Convention in Buffalo, but you know “the best laid plans” are often not what you planned at all. I came home from a month in Europe and the next day tested positive for Covid. Got the “magic” pills from my Doctor, but didn’t want to expose my friends to any germs so stayed home and missed the first two days of the Convention. Saturday morning, no red line on the test so felt it was safe to head out mask in hand.

I arrived at the hotel in time for a cup of coffee and the door prize drawings. I had just sat down and heard my number called. It’s a good thing to have your number called at convention. I got to pick a prize. I took home a bird seed feeder that I will give to my great grandson. As an active PM, I rarely missed a convention. It was a golden opportunity to network, go to classes, and tour different areas of our wonderful state. I also won some interesting door prizes over the years. Two that I remember are a kerosene heater and a kitchen ceiling fan and light. Crazy, but used them both.

However, the real reason I was so glad I could attend was because I had planned on awarding the retiree veterans a Quilt of Valor. Along with two members of my WNY Quilters for a Cause Chapter of the Quilts of Valor organization, we awarded quilts to five retired Postmaster Veterans. It was our pleasure to award quilts to Ben Johnston, Bob Maruschak, Keith Miner, Mike Silvestri, and Randy Sliker. We also gave two quilts to Betty Berndt to take home. One for her husband Jerry and the other for her son Tim. Both are veterans and will receive their quilts early in July. It is so rewarding to wrap the veterans in their quilts and thank them for their service.

The Quilts of Valor Foundation is a 501C3 non-profit organization that was founded in 2003. To date they have awarded over 379,000 quilts to active and retired military. My local chapter is

WNY Quilters for a Cause. We formed in 2018 and to date have awarded over 450 quilts. I am so proud of my group and their dedication to making quilts for veterans touched by war. Please take a minute and nominate a veteran you know for a quilt. Just go to [qovf.org](http://qovf.org) and click on Nominate a Veteran for a Quilt. You will need their name, address, phone, dates and branch of the service, etc. They can be in any state. It might take up to one year as the quilts are all handmade. If you would like to donate, you can do so by sending a check made out to Quilts of Valor to me at WNY Quilters for a Cause, 2700 Woodlawn Ave, Hamburg, NY 14075. I will see that it gets deposited in our account so we can continue to purchase the supplies need to make our quilts.

I’d also appreciate more than words can say the generous donation the retiree organization made to my Chapter. It meant a lot to me. All our quilts are made through the generosity of donors such as you. Thank you!

Mary Lou Zerby

PM Retired



Those presented with a Quilt of Valor - (from left to right) Ben Johnston-US Air Force, Robert Maruschak-US Army and Reserves, Keith Miner-US Army and Airborne, Randy Sliker-Coast Guard, Dick Dalrymple (previously presented with quilt and certificate), Michael Silvestri- US Army, and Dale Bernard (previously presented with a quilt and certificate)



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## THE DOWNSTATE PERSPECTIVE

### THIS IS AN SOS FOR THE LONG ISLAND DISTRICT

I have recently returned from the UPMA NYS Chapter Convention in Buffalo, New York. Not counting Henry Johnson who now hails for Key West Florida, the only Long Island members to attend the convention were David Cook and myself. I understand that the Amtrak ride was over 18 hours, there were no direct flights to Buffalo, the drive was 430 miles one way, and almost eight hours. The state offered to reimburse \$175.00 per night for two nights. The hotel charge for two nights with parking and taxes was \$318.00. (Do the math). There was room in my car for three other members to make the journey. All that attended the convention had an enjoyable experience. In my opinion you missed an opportunity to relax and get refreshed and energized for the difficult job you face each day. Well, that is water under the bridge.

Here is the reason for my writing this article. We have more than 150 UPMA members on Long Island. We need several of those members to step up and take a leadership role in the NYS UPMA First District, that is Long Island. I hosted several three digits meetings in the last six months. These meetings were well attended. I was successful in getting an active member to take the position of Long Island First District Coordinator. That member is Postmaster, Morgan

O'Connell. Morgan cannot assist all members who are having difficulties being successful at their job. He will need the assistance of others be successful. To quote one of the past leaders of our organization, Gerard A. Fiorenza, "Postmasters helping Postmasters." For those of you who do not know Jerry Fiorenza, he was a State President of our organization. The Massapequa Post Office was named in his honor. There are good dedicated strong managers on Long Island. We need you to step up and help others who are in need. You will not be alone. There are others like myself who are retired managers who are willing to advise you in your efforts. If you are being successful in your office but the neighboring office is not, then the Postal Service is failing. We all have to be successful. We need to lend a hand, lend a vehicle, lend an employee, and lend our experience. I spent many years in the Postal Service and in this organization. I want them both to continue to exist for many years to come. Please help one another to succeed. My father was an employee and my son is an employee of the Postal Service. Thank you for your dedication and service to the community you serve.

May God bless you and your family.



Retirees enjoying Convention



# Attention All Members

## 8TH UPMA National Convention

August 24-30, 2024

Orlando, FL

Caribe Royale

## Atlantic Conference

September 26-29, 2024

Albany, NY

Four Points by Sheraton

855-297-1429

### MEMBER INCENTIVES



**UPMA National Convention:** August 24-30 in Orlando, FL. This has a **\$1000.00** member reimbursement.

**Atlantic Conference:** September 26-29 in Albany, NY. Member **reimbursement for 2 or 3 nights hotel and registration fee.**

**Registration forms are in this issue of the ESP.**

[www.unitedpma.org](http://www.unitedpma.org)

[www.nyunitedpma.org](http://www.nyunitedpma.org)

[www.facebook.com/groups/nyupma](https://www.facebook.com/groups/nyupma)

I ♥  
NY



Deadline for  
October/November  
NYS ESP issue is  
September 7th by 5 pm

