


# WEBINAR HOUSEKEEPING

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  - ❖ **All phones will be muted.**
  - ❖ **All questions must be entered through the chat box located on the right side of your screen.**
  - ❖ **Time permitting we will answer the chat box questions at the end of the presentation.**
  - ❖ **Questions not answered during this session will be answered via email.**
  - ❖ **A copy of the presentation will be emailed to all PCC Co-Chairs and PCC Administrators along with the recording.**



The Scary Facts and  
Spooky Details  
of

# Publication 286

Presented by

Industry Engagement and Outreach

October 31, 2018

Enter If You Dare!

# Publication 286

## *Postal Customer Council Program Policies and Rules (Pages 1 – 6)*

***Presented By: Arnetta Wilson***

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### **Introduction**

- ✓ This Publication sets forth the policies and rules of operation for the PCCs.
- ✓ This version (March 2007) of the PCC Program Policies and Rules (Publication 286) supersedes all prior versions.
- ✓ Copies of this Publication can be obtained by downloading it at PostalPro <https://postalpro.usps.com>.
- ✓ All PCC activities and PCC members' interests in participating in PCC activities must be consistent with the **PCC Mission**, as set forth in this Publication.



# Mission Statement

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- ✓ The PCC is a postal-sponsored organization. The mission of the PCC Program is to:
  - Promote local cooperation and support and to foster a close working relationship between the U.S. Postal Service and all businesses that use the mail to communicate and interact with their customers.
  - Share information and facilitate the exchange of ideas about new and existing Postal Service products, programs, services, and procedures that affect all Businesses that use the mail.
  - Help PCC industry members and their organizations grow and develop professionally through focused educational programs.
  
- ✓ The mission statement of every local PCC should mirror this mission statement.



# PCC Membership

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- ✓ PCC membership consists of both Postal Service employees and representatives of the mailing industry.
- ✓ Membership is open to all business mailers who use the services of the Postal Service within the sponsoring Postal Service manager's geographic area.
- ✓ The terms “business mailers” does not include residential mailers.
- ✓ A business mailer may be a member of more than one PCC, but he/she cannot be an officer or Executive Board member of multiple PCCs.
- ✓ PCCs are postal-sponsored organizations.
- ✓ Mailing industry members are not authorized to act on behalf of the Postal Service nor authorized to legally bind the Postal Service by any of their acts or omissions.

# Competitors

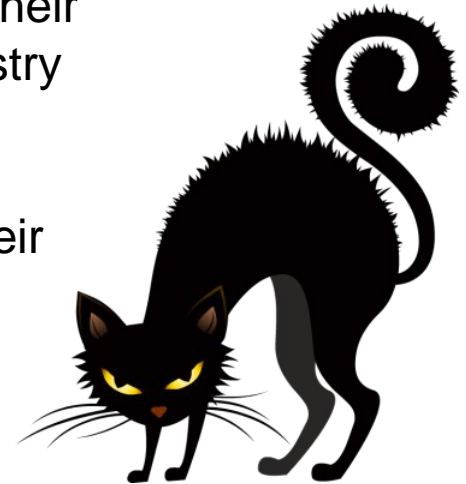
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- ✓ Competitors may become PCC members, but competitors may not serve on Executive Boards, PCC Committees, or as officers.
- ✓ Competitors may not exhibit at vendor shows or other PCC functions and may not promote or sell their products and services at PCC functions of any kind or give presentations at PCC events and meetings.
- ✓ Donations to the PCCs and sponsorships of PCC events by competitors are also prohibited.
- ✓ A competitor is an individual or company or other entity or association that partners with a competitor, promotes, sells or acts in support of products or services that compete with Postal Service products and services, even if such individual or entity is also a business partner of the Postal Service.
- ✓ A competitor includes those entities that are directly or indirectly, wholly- or partially-owned subsidiaries of a competitor and any individual employed by a competitor or the wholly- or partially-owned subsidiary of a competitor.

# Professional Responsibilities

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- ✓ While participating in or attending any PCC event, employees of the Postal Service are on official duty.
- ✓ Accordingly, Postal Service employees must adhere to all applicable laws and regulations related to federal employment.
- ✓ Industry PCC members may be subject to professional rules of conduct governing their professions or professional licenses, business or industry codes of conduct or industry affiliations.
- ✓ The Postal Service expresses no opinion as to such other rules or regulations or their applicability to industry PCC members while engaging in PCC activities.



# ***Publication 286***

## ***Postal Customer Council Program Policies and Rules***

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### ***Political Activities***

PCCs may not take part as an organization in any form of political activity or lobbying. Questions about these restrictions should be referred to the Postal Service Law Department by contacting either a Field Law Office or the Ethics and Federal Requirements Section at Headquarters.





# Publication 286

## *Postal Customer Council Program Policies and Rules (pages 6 – 9)*

***Presented By: Katrina Raysor***

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### **Postal Customer Council Committee (PCCAC)**

- ✓ Function: The PCCAC Committee is to function as an oversight body, providing guidance on Postal Customer Council practices and to bring PCCs together for mutual gain in order to accomplish the PCC Mission.
  
  - ✓ **PCCAC Responsibilities**
    - ✓ Educating PCC members.
    - ✓ Enhance the overall success of all PCCs.
    - ✓ Best practices.
    - ✓ Creative ideas for PCC programs and PCC growth.
    - ✓ Define PCC recognition programs and selecting PCC award winners.
    - ✓ Planning and execution of major PCC events.
    - ✓ Review the PCCAC Charter.
- Review PCC activities and practices.



# PCC Web Site

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- ✓ The PCC Web site [www.usps.com/pcc](http://www.usps.com/pcc) and PostalPro.
- ✓ PCC Recognition Programs.
- ✓ Locate a PCC.



# How to Organize a New PCC

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- ✓ PCC Charter Application signed by the District Manager.
- ✓ Steps
  - ✓ Notify the PCC Program office of your interest in establishing a local PCC.
  - ✓ Select co-organizers.
  - ✓ Establish the Executive Board.
  - ✓ Plan an organizational meeting.
  - ✓ Invite prospective members.

# Recommended PCC Organizational Structure

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- ✓ Postal Co-chair: local Postmaster.
- ✓ Choose dedicated co-organizers early.
- ✓ The Bylaws will be adopted by the first Executive Board of the PCC at its first meeting.
- ✓ No less than three members (Uneven number).
- ✓ The Executive Board must include at least two postal members.
- ✓ The main objective of the PCC's Executive Board is to meet the postal-related needs of the business community.



# Publication 286

## Postal Customer Council Program Policies and Rules (Pages 10 – 11)

Presented By: *Da Shiek Woodard*

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### Plan an Organizational Meeting

The PCC Program office has information about how to **plan and hold a successful organizational meeting**. There are materials available at [www.usps.com/pcc](http://www.usps.com/pcc).



1. Visit [usps.com/pcc](http://usps.com/pcc)
2. select **Manage a PCC**
3. select **Start a PCC in Your Area**
4. select **Step 5: Plan a Meeting & Invite Prospective Members**

### Invite Prospective Members

There are several sources for **identifying prospective members**. Organizers probably already know some local business leaders who would be interested in joining. More information about this subject is available at [www.usps.com/pcc](http://www.usps.com/pcc).



# PCC General Meetings (after PCC is established)

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PCCs should attempt to have at least **four PCC general meetings per calendar year**. The PCC general meetings are great opportunities to educate the PCC members about Postal Service products and services. Please refer to [www.usps.com/pcc](http://www.usps.com/pcc) for information on how to conduct a successful general PCC meeting.



1. Visit ***usps.com/pcc***
2. select ***Manage a PCC***
3. select ***Start a PCC in Your Area***
4. select ***Step 5: Plan a Meeting & Invite Prospective Members***

# Attendance at PCC Functions and Meetings

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The Postal Service may **reimburse postal employees** for properly incurred and documented expenses of such employees associated with attendance at and traveling to or from PCC events, as approved by the appropriate Postal Service manager.

As always, postal employees are subject to the federal ethics laws and regulations at all times and must therefore **avoid accepting gifts** from prohibited sources and **must not engage in fundraising activities** in their official capacity.



***"Better safe than sorry."  
"Don't play with fire."  
"Don't feed them after midnight."***



# Mailing Lists and Member Data

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- ✓ Customer or Mailing Lists. Mailing lists or other lists of names or addresses (past or present) of Postal Service customers or other persons may not be made available to the public by any means or for any purpose.
- ✓ The list may be used only for PCC business-like newsletters and meeting notices.
- ✓ Therefore, a PCC member must sign a nondisclosure agreement before being given access to the list to use for PCC business.
- ✓ PCCs may buy or rent mailing lists.
- ✓ Industry PCC members can create and maintain non-Postal Service mailing lists for PCC purposes. This list is subject to disclosure and must be consented to by members who sign up.



***"Be confident with your confidentiality."***



# Policy on Publications and Use of Postal Service Intellectual Property

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- ✓ All PCC communications must be consistent with the PCC Mission and are **subject to approval by the local PCC Executive Board**. PCC materials must:
  1. *be neutral on religious, social, political, legal, moral or other public issues.*
  2. *not be obscene, deceptive, or defamatory etc.*
  3. *not harm the public image, reputation, or good will of the Postal Service.*
  
- ✓ PCCs can seek permission to use Postal Service intellectual property from USPS Rights and Permissions, which can be found at: <https://about.usps.com/doing-business/rights-permissions/welcome.htm>



*"I'd rather not comment on that."  
"Don't quote me."  
"I cannot confirm nor deny..."*

# **Publication 286**

**Postal Customer Council Program Policies and Rules (Pages 12 – 15)**

**Presented By: Lewis Johnson & Sharon Barger**

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## ➤ **Policy on Advertising**

## ➤ **PCC Finance and Funding**

- ✓ **Bank Accounts.**
- ✓ **Required Financial Reports.**
- ✓ **Credit/Debit Cards Acceptance.**
- ✓ **Tax Exempt PCC Purchases and PCC Expenditures.**
- ✓ **Sources of PCC Funding.**
- ✓ **Solicitation of Funds for PCC Use.**
- ✓ **Charitable Endeavors.**
- ✓ **Donations and Sponsorships.**
- ✓ **Appropriate Acknowledgment of Donations and Sponsorships.**



# Policy on Advertising

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PCC publications, mailings, materials, and other communication media, including individual PCC websites that are linked to <http://about.usps.com/postal-customer-council/pcc-locator.htm> (*PostalPro*), may not be used to advertise or promote individual businesses or vendors or to convey other messages or commentary not in furtherance of the PCC Mission.

- ✓ Sales slogans or verbiage intended to promote non-Postal Service products, services, or businesses.
- ✓ Other types of messages or commentary that are not strictly designed to promote or serve the PCC Mission or Postal Service products or services.

# PCC Finances and Funding

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## Bank Accounts

- ✓ PCCs are postal-sponsored organizations.
- ✓ Only one bank account.
- ✓ Use Postal Service Tax ID: 41-0760000.
- ✓ PCC Bank Name: United States Postal Service – [insert name of PCC].



# PCC Finances and Funding

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## Required Financial Reports

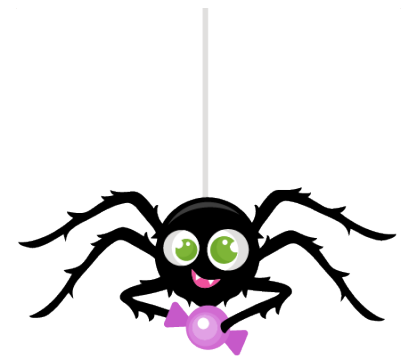
- ✓ Follow the Postal Service Fiscal Year (FY) Calendar: October through September.
- ✓ Must keep financial records for a period of four years: Three full year plus current year.
- ✓ Must provide at a minimum a semi-annual report, including monies on hand, revenues received, and expenses, to the District Manager or his/her designee for review and retention no later than 30 days following the end of the period.
- ✓ Template located on *PostalPro* at <https://postalpro.usps.com/node/2206>.
- ✓ Annual financial audit/review at end of each FY: Postal Service District Office (reviewer to be assigned by District Manager) or independent certified public accountant.

# PCC Finances and Funding

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## Credit/Debit Card Acceptance

- ✓ Credit/debit cards are allowed to accept PCC fees and payments.
- ✓ Any such agreement/contract must be reviewed and approved by the PCC Executive Board and signed by the Postal Co-Chair or jointly by the Postal and Industry Co-Chairs.
- ✓ Keep agreement/contract on file for auditing purposes.



# PCC Finances and Funding

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## Tax Exempt PCC Purchases and PCC Expenditures

- ✓ Purchases may be made by the PCC on tax-exempt bases using the Postal Service Tax ID (*whenever possible*).
- ✓ Purchases must be related directly to an event, function or matter that has a postal purpose consistent with the PCC Mission.
- ✓ PCC expenditures may be recommended by the PCC industry members but must be approved by the Postal Co-Chair.
- ✓ PCC checks must be signed by the Postal Co-Chair and may be signed jointly by the Postal Co-Chair and the Industry Co-Chair.

# PCC Finances and Funding

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## Sources of PCC Funding

- ✓ Annual Membership Fee *(if one is assessed)*.
- ✓ Sponsorship donations of cash, goods and services, including fees collected through educational seminars and vendor shows.





# PCC Finances and Funding

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## Solicitation of Funds for PCC Use

- ✓ Postal employees may **not** participate in the solicitation of cash, goods, services or any other gifts on behalf of the PCC or in connection with any event held, sponsored or organized by the PCCs. (*Federal Ethics Regulations*)

# PCC Finances and Funding

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## Membership Fees

- ✓ PCCs may charge reasonable annual membership fees. Postal employees are **not** subject to membership fees.
- ✓ Annual membership fees should be determined by the local PCC Executive Board or general membership.
- ✓ Based on a *per person* or a *company* rate, or both.
- ✓ **No one** should be excluded from participating in the PCC because of the inability to make donations, contributions or pay membership fees.



# PCC Finances and Funding

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## Fundraising Events to Benefit PCC

- ✓ PCCs are **not** intended to operate as profit-making organizations. Should function on a break-even basis.
- ✓ PCCs may sponsor activities to offset costs for educational activities.
- ✓ Special event-related PCC fundraisers: group outings, sporting events and tournaments, vendor show, and exhibits.
- ✓ Due to state sweepstakes laws, contests, casino nights and any of form of gambling are **not** permitted at PCC events and functions, or as a fundraising mechanism for PCCs.
- ✓ Postal employees who participate in the PCC event are **not** eligible to receive awards, prizes, free admission or other gifts **unless** such awards, prizes, etc. are paid for in their entirety with Postal Service funds.

# PCC Finances and Funding

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## Charitable Endeavors

A PCC may **not** use its funds or solicit cash or monetary contributions to fund charitable causes, scholarships, relief or assistance funds, insurance programs, hardship loans, political activities, gifts, or other causes or activities not directly related to the PCC Mission.

**Exception:** PCC Solicitation of Gifts-in-Kind:

- ✓ Area Vice President Approval.
- ✓ Community Service Activities Policy (CSAP) – *USPS Administrative Support Manual Section 333.7.*

**CSAP:** Only charitable activities designed to meet the needs of specific causes may be approved:

- ✓ Assisting victims of a disaster.
- ✓ Relieving hunger.
- ✓ Promoting education/literacy.
- ✓ Enhancing the environment.
- ✓ Promoting wellness.
- ✓ Promoting child safety and well-being.



# PCC Finances and Funding

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## Donations and Sponsorships

- ✓ Sponsorships and donations are both defined in this context as the provision of cash, goods, or services to the PCC in support of the PCC Mission or a PCC-hosted event.
- ✓ Industry members of the PCC may accept donations of cash, goods and services for the use of the PCC in fulfilling its Mission.
- ✓ Donations and sponsorships to the PCC offered by competitors may **not** be accepted.
- ✓ Postal Service employees are **not** authorized to accept any gifts, donations or otherwise, on behalf of the PCC. (*Federal Ethics Regulations*)

# PCC Finances and Funding

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## Appropriate Acknowledgment of Donations and Sponsorships

### Acknowledgements may take the form of:

- ✓ Listing of business names and/or business logo, or individual names accompanied by basic contact information (physical addresses and mailing addresses, if different, general phone number, email address, and/or website address) must include the following statement:
- ✓ No endorsement by the Postal Service or the PCC is given or implied by the acknowledgement.

### Official Placement of Acknowledgements:

- ✓ PCC Publications.
- ✓ Mailings.
- ✓ Materials or other communication media, including PCC event signage or PCC websites.



# Publication 286

## Postal Customer Council Program Policies and Rules (Pages 16 – 17)

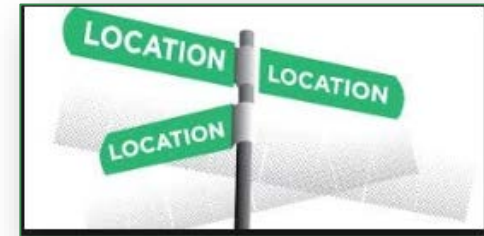
Presented By: Cathy Scocco

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### Meeting and Event Issues

#### ✓ Meeting or Event locations

- ✓ Postal Service facilities (subject to USPS regulations regarding conduct on property).
- ✓ Industry PCC member's business.
- ✓ Hotels/Convention Centers.
- ✓ Local businesses that have a meeting rooms:
  - (Library, School, Country Club, Zoo, Aquarium, Casino).
  - Winery – **not** an option.



# Contracts for Outside Meeting Venues

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- ✓ Contracts **MUST** be signed by the PCC Postal Co-Chair.





# Meeting and Event Speakers and Topics

- ❑ All meeting and event presentations including exhibitor and vendor displays must:
  - ✓ Be designed to promote and serve the PCC Mission.
  - ✓ Are subject to the approval of the PCC Executive Board.
  - ✓ Be consistent with the USPS intent to maintain neutrality on:
    - Religion – Social – Political – Legal – Moral – Other Public Issues.
  - ✓ Cannot be obscene, deceptive, defamatory of any person, entity or group, nor advocate unlawful action.
  - ✓ Cannot harm the public image, reputation or good will of the USPS.
  - ✓ Cannot be derogatory or detrimental to the interests of the USPS.
  - ✓ Display only products or services that comply with the USPS regulations.
  
- ❑ Speakers and Exhibitors:
  - ✓ Active PCC members.
  - ✓ Other business mailers who are not competitors.
  - ✓ **Cannot** use the PCC function for personal gain or promote their products, services, or business.
  
- ❑ Any questions about a proposed presentation, exhibit, or display contact the PCC Program office.



# Postal Service Resources

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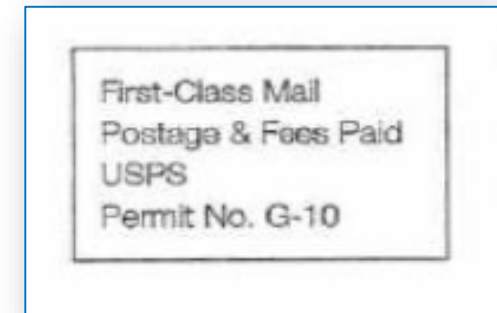
- ✓ **Provide current and accurate information.**
  
- ✓ Inform PCC members of Postal Service resources.
  - PostalPro.
  - TeamSite.
  - For information on the USPS products and services refer them to USPS.com and Postal Explorer.

The logo for PostalPro, featuring a stylized blue icon of a building or structure to the left of the text "PostalPro™" in a blue sans-serif font.The logo for TeamSite, featuring the text "TeamSite" in a blue sans-serif font.The logo for USPS.COM, featuring the USPS eagle head icon in blue and red to the left of the text "USPS.COM®" in a blue sans-serif font.The logo for Postal Explorer, featuring the text "Postal Explorer" in a blue sans-serif font.

# Use of G-10 Permit for PCC Mailings

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- ✓ PCCs may use the G-10 permit for:
  - To announce future PCC meetings or seminars.
    - Include the location, date, time, fees and any other useful information.
  
- ✓ Mailings may consist of:
  - Mailpieces that were prepared with postal expenses.
  - Mailpieces that were prepared by the PCC.
  - Combination of both Postal and PCC.
  
- ✓ Advertising, documents prepared or provided by any other parties may not be included in these mailings.



# TIME PERMITTING

## Q&A

All questions must be entered  
through the chat box.



THANK YOU FOR ATTENDING!

coverlayout.com

HAPPY  
HALLOWEEN  
HALLOWEEN

