### **Skills of the Secretary**

National Association of Postal Supervisors Training

### Secretary Duties

Administration, Accuracy and Transparency





### Duties of a NAPS Branch Secretary



<u>Note</u> Many branches have combined Secretary duties with Treasurer duties.

### What does a NAPS Secretary do?

**Officers Training Manual (OTM)** 

### Secretary's Responsibilities

- 3.1. Definition of a Secretary
- 3.2. Dues Check-Off Print-Out (DCO)
- 3.3. Communicating with NAPS Headquarters
- 3.4. Record Keeping
- 3.5. Meeting Minutes
- 3.6. Branch Newsletters and Web Sites
- 3.7. Merging Branches
- 3.8. The Postal Supervisor Distribution
- 3.9. Invitations to NAPS Headquarters



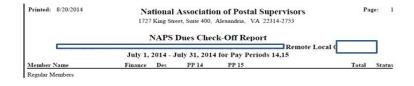


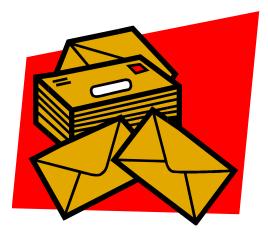




- Membership Rolls
- Correspondence
- Record Keeping
- Meeting Minutes









### Membership Rolls

- Types of Members
- Membership Forms
  - 1187
  - 1187A
- Dues Withholding
- Dues Check-Off List
- Member Exceptions

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### **Types of Members**

- Active USPS Employed
- Associate USPS Retired
- Honorary No benefits

### **Membership Forms**

- 1187 Active
- 1187A Associate

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#### Active Members - Complete Form 1187

- Social Security # (USPS required)
- USPS EIN (NAPS required)
- No USPS/Gov't email
- Form 50 Finance #
  - Branch dues amount
  - Branch affiliation #
- Signature of new member
- Signature of branch officer (optional)
- Mail original & copy to NAPS HQ
  - Make copies for branch and member
- Complete sponsor section for \$25

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NOTE: Don't hold for branch approval. Mail *immediately* the signed Form 1187 to NAPS HQ to ensure members receives benefits.

#### Associate Members

- Complete Form 1187A
  - Last 4 of Social Security #
  - Select branch to affiliate (May join any NAPS branch)
  - Associate member signature
  - Mail to NAPS HQ

-	NATIONAL ASSOCIATIO	N OF POST/	AL SUPERVISORS								
	REQUEST FOR ASS	OCIATE I	MEMBERSH	IP							
	PLEASE PRINT LEGIBLY										
	ASSOCIATE MEM	BER INFORM	ATION								
ASSOCIATE MEMBER'S NAME											
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I hereby request Associate membership in accordance with Article III, Section 3 of the National Association of Postal Supervisors (NAPP) National Constitution & Bylews: U understand that the amount of Associate membership dues is neehalf (4/2) the national regular per capita, plus any additional amount as determined by the local NAPS Branch in which I have requested membership; and my full dues is paid directly to that Branch. I further understand that Asociate membership induces a yearly subscription for The Postal Supervisor measure.

I understand that my Associate membership will remain in effect until I notify NAPS headquesters in writing to terminate my membership. Alternately, the Branch with which I am associated is suthorized to notify NAPS headquesters to therminate my membership if I bill to pay my Associate membership dues as established by the Branch. If I elect to change my branch affiliation as an Associate member, I must notify NAPS headquesters in writing of such change.

Dues to the National Association of Postal Supervisors are not deductible as charitable contribution

I hereby request Associate membership in LOCAL or STATE BRANCH NUMBER

ate members have the right to request membership to a NAPS branch of their choice

SIGNATURE OF APPLICANT FOR ASSOCIATE MEMBERSHIP	DATE
This is not an official US Postal Service form. This is a NAPS form for optional use to request Associate members Associate membership may be sent via NAPS 1187-A, personal letter, fax or email by the individual requesting bra	

- Inform branch via letter/email to become associate member -- branch contacts NAPS HQ
- Retiree contacts NAPS HQ directly via letter/email requesting associate membership



National Per Capita Dues Withholding

Active – Per Capita \$3.50/pay period

- USPS Payroll
- Direct Pay Pay branch directly

#### Associates – Per Capita \$1.75/pay period

- Notify Associate when dues is owed
- Pay associate dues directly to branch
- National MAL Pay directly to NAPS HQ

Branches establish their own dues assessment. Dues must at least cover national per capita.



### Cancelling Active Membership

- Member's responsibility to cancel Not NAPS!
- \* USPS PS Form 1188 required
  - USPS HR action send to HRSSC
  - \* Exception: if member is in non-deduct status –Not paying branch
  - No email/letter will cancel Active membership
- Cancellation Time
  - 1<sup>st</sup> full PP in March (see 1187)
  - 1<sup>st</sup> full PP in September (see 1187)
  - No anniversary date requirement
  - No refund of member's dues





### Secretary's Responsibilities Cancelling <u>Associate</u> Membership

- Can be cancelled any time
  - Member notifies NAPS HQ in writing
  - Branch notifies NAPS HQ in writing
  - Death of Associate Branch notifies NAPS HQ
- Will be cancelled next available DCO
- No refund of Associate's per capita to branch



### Secretary's Responsibilities Membership Rolls

#### **Request for Branch Affiliation Exception** Article III, Section 6

Section 6. A member's place of residence does not qualify as a criterion for requesting an exception to affiliate with another branch. NAPS Headquarters shall accept requests from members for branch affiliation exceptions in the following situations:

a) When members are affected by Postal Service-initiated consolidations, or

b) When a member's office of physical domicile is different from his or her employing office (USPS Finance number of record).

In both cases, the member's attendance and participation at branch meetings and activities would be hampered by physical distance from their employing office. The member's current area vice president shall investigate written exception requests and report said findings to NAPS Headquarters for concurrence by at least two-thirds of the resident officers.

c) When no local branch in a members' home state is located within 50 miles of their assigned work location.



### **Monthly Branch Reports from NAPS HQ**

- Dues Check-Off (DCO) Report
- Change Report
  - Non-Member Report



• Address Report / NAPS Mail List



### **Dues Check-Off List**

- Branch affiliation
- Pay Periods of dues withholding
- Monthly membership roster
  - Active
  - Associate
- Finance #'s
- Status flags

Printed: 8/20/2014				on of Postal Supervisors Alexandria, VA 22314-2753	Pa	ige: 1
	1	NAPS	Dues Chec	ck-Off Report Remote Local		
	July 1,	2014 - J	uly 31, 2014	for Pay Periods 14,15		_
Member Name	Finance	Des	PP 14	PP 15	Total	Status

- Total membership
- DCO dues amount to branch



#### Managing Dues Check-Off (DCO) Report

DCO Designation	DCO Meaning
ADJ	USPS returned back pay to member, dues too
CANCEL	Membership canceled due to Form 1188
DECR.	Dues of member decreased
INCR.	Dues of member increased
NO DED	No dues deducted for member
NU EMP	New Branch Member - 1187
RET.	Member retired from USPS
SEP.	Member quits USPS or removed by USPS
Asterisk <b>*</b>	Not Receiving Postal Supervisor Bad address listed at NAPS HQ



#### Managing Dues Check-Off (DCO) Report

Printed: 8/20/2014

National Association of Postal Supervisors

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Page: 1

1727 King Street, Suite 400, Alexandria, VA 22314-2753

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	1	NAPS	Dues Check	k-Off Report		1
	July 1,	ote Local (	1			
Member Name	Finance	Des	PP 14	PP 15	Total	Status
Regular Members						
LES	2528	09	\$10.00	\$10.00	\$20.00	
LOP	5745	09	\$12.50	\$10.00	\$22.50	DECR.
LOP	5745	09	\$10.00	\$10.00	\$20.00	
LOP	5552	09	\$10.00	\$10.00	\$20.00	
LO/	5552	09	\$10.00	\$10.00	\$20.00	
MAI	5156	09	\$10.00	\$10.00	\$20.00	
*MA	5553	09	\$10.00	\$10.00	\$20.00	
MAI	5157	06	\$10.00	\$10.00	\$20.00	
MC	5745	09	\$10.00	\$10.00	\$20.00	
MIL	1896	08	\$10.00	\$10.00	\$20.00	
MIL	2748	09	(\$3.50)	(\$3.50)	(\$7.00)	NO DED
PRE	)6	08	\$10.00	\$10.00	\$20.00	
RAI	19	05	\$10.00	\$10.00	\$20.00	RET.
RAS	74	09	\$10.00	\$10.00	\$20.00	
RHO	.8	08	\$10.00	\$10.00	\$20.00	
RIC	96	09	\$10.00	\$10.00	\$20.00	INCR.





# National Association of Postal Supervisors Printed: 8/20/2014 Re N

Associate Total

#### Secretary's Responsibilities

#### Managing Dues Check-Off (DCO) Report

National Association of Postal Supervisors

Page: 1

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1727 King Street, Suite 400, Alexandria, VA 22314-2753

#### NAPS Dues Check-Off Report

				Remote	Local (
	July 1, 2	014 - Jul	ly 31, 2014 fo	r Pay Periods 14,15	
Member Name	Finance	Des	PP 14	PP 15	Total Status
Regular Members					
egular Members					
	30	08	\$8.00	\$8.00	\$16.00
	30	09	\$8.00	\$8.00	\$16.00
	33	09		\$8.00	\$8.00 NU EMP
	8	09	\$10.00	\$10.00	\$20.00
	5	09	\$12.50	\$10.00	\$22.50 DECR.
	5	09	\$10.00	\$10.00	\$20.00
	2	09	\$10.00	\$10.00	\$20.00
	2	09	\$10.00	\$10.00	\$20.00
	6	09	\$10.00	\$10.00	\$20.00
	3	09	\$10.00	\$10.00	\$20.00
	7	06	\$10.00	\$10.00	\$20.00
	5	09	\$10.00	\$10.00	\$20.00
	6	08	\$10.00	\$10.00	\$20.00
	8	09	(\$3.50)	(\$3.50)	(\$7.00) NO DED
				-	
Associate Members					
E		09	(\$1.75)	(\$1.75)	(\$3.50)
s			(\$1.75)	(\$1.75)	(\$3.50)

(\$3.50)

(\$3.50)



### Secretary's Responsibilities Managing Dues Check-Off (DCO) Report NAPS Change Report

Printed: 8/20/2014

#### National Association of Postal Supervisors

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NAPS Change Report

	Remote Loca								
	Current changes applied July 9, 2014 - September 5, 2014								
Member Name	Change Notes								
	USPS Member Roster finance number change. Finance 056770 - SAN DIEGO CA changed to 055157 - MORENO VALLEY CA. Original branch NAPS*159 changed to NAPS*466 with new finance number.								
1	USPS reported finance number change. Finance 051392 - CATHEDRAL CITY CA changed to 054872 - MENTONE CA. The finance number change did not trigger a change in the branch.								
1	USPS Member Roster finance number change. Finance 057758 - TEMECULA CA changed to 052528 - ESCONDIDO CA. The finance number change did not trigger a change in the branch.								
	USPS Member Roster finance number change. Finance 051309 - CARLSBAD CA changed to 052592 - FALLBROOK CA. Original branch NAPS*159 changed to NAPS*466 with new finance number.								



### Secretary's Responsibilities Managing Dues Check-Off (DCO) Report Non-Member Report

Printed: 8/20/2014

National Association of Postal Supervisors 1727 King Street, Suite 400, Alexandria, VA 22314-2753 Page: 1

#### NAPS Non-Member Report 09 Branch # 119 - SPRINGFIELD, MISSOURI Remote Local 287530 July 1, 2014 - August 30, 2014

Member Name	Grade	Gender	Des	Finance Post Office	Zip Code
q		М	09	287534 SPRINGFIELD MO	65807-9998
F		F	09	286750 REPUBLIC MO	65738-9998
F		M	06	287530 SPRINGFIELD MO	65801-9999
F		M	09	287533 SPRINGFIELD MO	65807-999
L		F	09	287530 SPRINGFIELD MO	65801-9999
N		M	06	287530 SPRINGFIELD MO	65801-999
N		M	06	287530 SPRINGFIELD MO	65801-9999
F		F	19	287530 SPRINGFIELD MO	65801-9999
F		М	09	287534 SPRINGFIELD MO	65807-9999





### Secretary's Responsibilities Managing Members' Addresses NAPS Mail List

Printed: 1/31/2022

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NAPS Mail List Area 07 - Branch # 255 - HEART OF ILLINOIS BRANCH, ILLINOIS Remote Local 166180 Current Mail List December 2021 (195 Members)

Member Name	EIN	Finance		Email	Address	City, State Zip
ALLEN, ROSHAN		167417			2176 N C	ur, IL 62526
ANDERSON, CRY		162004			540 LAW	ION, IL 62549
ANDREWS, SHEI		161404	crazyca	ahoo.com	903 W 7ti	ulia, IL 62801-5728
ARBUCKLE, MIC		160378	ARBU(	HSI.COM	11 W FIR	LSO, IL 61738-1010
ARMSTRONG, L		161430			3205 Hali	paign, IL 61822-5361
*ARMWOOD, NA		166182			UTF - 16(	al, IL BADADD61761
ASHBACHER, D/		166182	DARYI	HER@COMCAST.NET	10930 N J	LAP, IL 61525
AUSTIN, KIZZIE		161734			113 S 35tl	rille, IL 62226-6314
*BARGER, SHEM		165400	shem19	com	UTF - 204	FIELD, IL BADADD62837-174



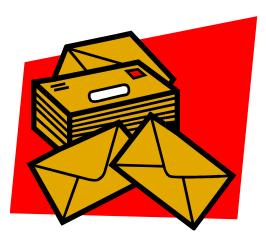




- Membership Rolls
- Correspondence
- Record Keeping
- Meeting Minutes









### Correspondence

• Branch mail



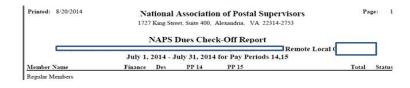
- Officer information & updates
  - Officer Profiles for receiving NAPS HQ info
- Member Change-of-Address
  - To receive The Postal Supervisor
- Letters/emails to NAPS HQ
  - Member Issues (DCO Status)
  - Invitations to events
  - Changes in branch dues





- Membership Rolls
- Correspondence
- Record Keeping
- Meeting Minutes









### Secretary's Responsibilities Record Keeping

- Keep records up-to-date & legible
- Update Branch Constitution & Bylaws
- Make files and organize
- Keep centrally located
- Backup computer

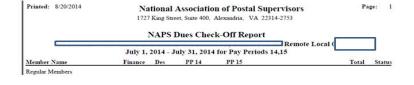


- Turn records over to new officers
- Consult lawyer and/or CPA when needed
- Record retention Don't hoard



- Membership Rolls
- Correspondence
- Record Keeping
- Meeting Minutes









### Meeting Minutes

- Summary of what happened
- Reflects branch's decisions
- Discussion and decisions reported
- Not every comment is quoted
- Motions and votes recorded
- Committee & other reports covered
- Stop meeting for clarification
- Keep a file / backup from computer
- Publish in newsletter or send to members (*optional*)
- Read/copies at next branch meeting





National Association of Postal Supervisors

### What does a NAPS Secretary do?

**Officers Training Manual (OTM)** 

### Secretary's Responsibilities

- 3.1. Definition of a Secretary
- 3.2. Dues Check-Off Print-Out (DCO)
- 3.3. Communicating with NAPS Headquarters
- 3.4. Record Keeping
- 3.5. Meeting Minutes
- 3.6. Branch Newsletters and Web Sites
- 3.7. Merging Branches
- 3.8. *The Postal Supervisor* Distribution
- 3.9. Invitations to NAPS Headquarters





### • Branch Newsletters and Web Sites

- Includes Branch meeting minutes
- Local officer contact information
- Meeting notices
- Merging Branches (Article IV, Section 2)
  - Format a petition



- Majority 50%+1 sign petition to merge
- Accepted by gaining branch
- Notify members and NAPS HQ of results
- Automatic dues adjustment by NAPS HQ



- The Postal Supervisor magazine
  - Keep members' mailing list updated
  - Asterisk (\*) on DCO report "bad address" of member
  - Notify NAPS HQ of member address changes

### • Invitations to NAPS Headquarters

- Send at least 2 months in advance sooner if possible
- Provide details of NAPS event (Who, What, Why, When and Where)
- No charge for Resident Officers to attend
- Indicate if requesting a particular Resident Officer



### Secretary's Responsibilities Review NAPS

#### **Officer Training Manual (OTM) Chapter 3** *Revised January* 2022

3. Secretary's Responsibilities	13
3.1. Definition of a Secretary	
3.2. Dues Checkoff Print-Out (DCO)	
3.2.1. Membership	
3.2.2. Active and Associate Members	
3.2.3. Honorary Members	
3.3. Communicating with NAPS Headquarters	
3.3.1. Branch Officer Information	
3.3.2. Member Change of Address Form	
3.3.3. Correspondence	
3.4. Record Keeping	
3.4.1. Suggested Schedule for Retaining Branch Records	
3.5. Meeting Minutes	
3.6. Branch Newsletters and Web Sites	
3.7. Merging Branches	
3.8 The Postal Supervisor Distribution	
3.9. Invitations to National Officers and NAPS Headquarters	



## Thank You!



# Questions?

