

# Introduction

The mail is an important part of the fabric of America and America's trust in the United States Postal Service remains a cornerstone of our industry. As the Postal Service and the industry face a future increasingly defined by change, supporting mail growth by adding value for customers is a key strategy of the Postal Service's Transformation Plan. With that in mind, the Postal Service and its industry partners must be open to innovation, new ideas and new ways of moving the mail more efficiently than ever. But our partnership is built on a progressive attitude that has resulted in many positive changes over the years. One of the most notable is the Postal Customer Council Program, started in 1961. It continues to build stronger communications between business customers and Postal Service managers in their communities. Its success continues to pave the way to innovation and opportunity for mailers and for the Postal Service. And we'll continue along this path, working to reduce costs while we improve service and efficiency. After all, they're the foundation of mail's unique value, and we'll build on them to continue improving that value.

# About This Publication

This publication provides advice to postmasters or other appropriate U.S. Postal Service managers and representatives on organizing and operating a Postal Customer Council® (PCC). Inside, you will find the policies and procedures that apply to establishing and operating a PCC, along with some helpful hints and tips. It is a valuable source of information for postmasters, customer relations coordinators, district managers, other Postal Service employees and PCC members in general, and co-chairs/executive board members specifically.

In this publication, the term “direct Postal Service competitor” is considered to be a company that offers competing services to those offered by the Postal Service. Such a company does not promote or offer Postal Service products or services to its customers. This restriction includes a company owned by such a competitor. While the Postal Service might contract with a business for specific services, such as air transportation, that company could still be considered a “direct Postal Service competitor.” The policy of the PCC Program is that direct competitors of the Postal Service are not permitted to be executive board members, speakers, exhibitors, or vendors at PCC functions. Involvement of such companies is restricted to general membership status only — as long as they do not sell, offer, or discuss their products and services at official PCC functions.

We wish to thank the 2002—2003 National Postal Customer Council Advisory Committee (PCCAC) for its help in editing and reviewing this book, past PCCAC members for laying the foundation for this material, and John Wargo, Vice President, Service and Market Development, Postal Service, for his continuing support.

Current members of the National PCC Advisory Committee can be found on the national PCC Web site at [www.usps.com/nationalpcc](http://www.usps.com/nationalpcc).

This publication was reviewed for legal and ethical considerations by the Law Department USPS Headquarters, Washington, DC.

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# 1 Definition of a Postal Customer Council

## History of the Program

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The Postal Customer Council (PCC) Program began in 1961 with the formation of local mail users' councils, also known as citizens' advisory councils. The old Post Office Department organized the councils to improve communications between Postal Service customers and local Postal Service managers. The councils first came into prominence supporting a "mail early" campaign in the mid-1960s. In 1971, the name was changed to Postal Customer Councils.

The early mail users' councils were designed to focus on both residential and business mailing issues. However, it didn't take long for local Postal Service managers to realize that business mailers had the biggest impact on their local operations. Gradually, as citizens' advisory committees (CACs) were created to address residential mailing issues, PCCs became more business mailer Postal Service manager-focused.

Once business customers and local Postal Service managers began working together, they found that many problems could be resolved easily. Processing and delivery improved; customer satisfaction and business and Postal Service revenues rose; and business and Postal Service resources and equipment were used more productively. More importantly, this customer satisfaction and cooperative working relationship reached such new levels that the direct mail industry was stimulated to grow steadily into the more than \$900 billion-a-year industry that it is today.

Today, there are more than 250 PCCs representing over 100,000 active mailers. Through regular meetings, vendor events, educational sessions, mailer clinics, and seminars, PCC members keep abreast of the latest Postal Service developments and work closely with local Post Offices to make mail service more efficient, timely, relevant, and profitable. The Postal Service supplies speakers and resources for PCC presentations, and because we share the members' interest in efficient and economical mail service, we encourage business mailers to take part in PCCs whenever they can.

As it has since 1961, the Postal Service supports the PCC Program with management and resources, and it views the PCC Program as an important

avenue for improving customer service, customer satisfaction, and corporate profitability — for both business mailers and the Postal Service. Over the last four decades, the competitive arena has changed drastically with the emergence of faxes, emails, electronic data interchange (EDI), electronic funds transfer (EFT), package service competition, and more. Through it all — and with the direct help of PCCs and the business partnerships they have fostered — the Postal Service has continued to grow, and it remains a viable, necessary, and universal organization for the future.

## PCC Mission Statement

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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; and
- Help PCC members and their organizations grow and develop professionally through focused educational programs.

## Benefits of PCC Membership

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It's "NICE" to belong to a PCC:

- Networking — *Hear how to put others' best practices to use for you.*
- Information — *Help your business be more productive.*
- Communications — *Interact with mailers, vendors, and Postal Service personnel.*
- Education — *Learn how the Postal Service can help your business become more profitable.*

All businesses that use the mail as communication and fulfillment media with their customers will benefit from the PCC's regular networking forums by maintaining a close working relationship with their postmasters and other Postal Service managers. These events provide opportunities to meet other mailers, mailing experts, vendors from the mailing and fulfillment industry, and managers from the Postal Service to discuss issues that affect a single business or the whole mailing industry.

PCC members communicate information, ideas, and best-practice suggestions on new Postal Service products and services and their own internal operations. This interaction provides productive money-saving and revenue-generating ideas to enhance their use of Postal Service products and services to meet their business needs.

Your PCC membership brings you a working relationship with PCC members from other parts of the country. Many members who meet at PCC events

form close bonds of cooperation, and they frequently host multi-PCC events/expositions to share insight into various Postal Service processes, programs, and issues and to provide advice on improving their mail centers, marketing strategies, transportation issues, and logistics functions. Many PCC members even provide help by sharing equipment and knowledge at critical mailing times.

## Postal Customer Council Advisory Committee

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In 1993, in an effort to improve the effectiveness of the national PCC Program, and to extend its usefulness and relevance within the mailing community, the Postal Service formed the Postal Customer Council Advisory Committee (PCCAC). Its goal was to seek advice from a representative group of mailers on plans to improve the national PCC Program.

The mission of PCCAC is stated as follows: “To serve as a vital link between PCCs and the USPS in communicating the value of PCCs for their mutual benefit by providing guidance and best practices.”

This guidance and best practices include the following:

- Provide creative ideas for PCC programs and PCC growth.
- Create and maintain policies/guidelines.
- Communicate between PCCs and the Postal Service.
- Advise PCCs and the Postal Service.
- Provide bylaw interpretation.
- Capture and communicate best practices.
- Recognize and reward PCCs.
- Develop success indicators.
- Promote and provide education.

## PCC Web Site

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The PCC Web site ([www.usps.com/nationalpcc](http://www.usps.com/nationalpcc)) is the prime communications vehicle of the PCC Program. Members are encouraged to register or log on frequently (bookmark the site) for current updates affecting the PCC Program nationwide.

Established in 1997, the Web site contains many interesting and helpful sections to assist PCCs throughout the country. In addition to links to the National Postal Forum Web site ([www.npf.org](http://www.npf.org)) and the national Postal Service Web site ([www.usps.com](http://www.usps.com)), it also offers the national PCC Awards criteria and application forms every year. The PCC Web site’s sections also include the following:

- A “Locate a PCC” map so you can find the names, addresses, telephone numbers and email addresses of PCCs and Postal Co-chairs throughout the country.

- A Speaker's Bureau listing to assist you in obtaining educational/information Postal Service speakers for your PCC meetings.
- An electronic version of *Keeping Posted*, the newsletter of the PCC Program.
- A national/local events screen to keep you apprised of upcoming events.
- Publication 286 (*Postal Customer Council Program*) in electronic form for easy access and downloading.
- A Frequently-Asked-Questions (FAQ) section.
- A description of the PCC Program, including its vision and mission statements.
- An ethical/legal section.
- A listing of national PCCAC members.

Please bookmark this Web site for easy access and refer to it on a regular basis for current updates, changes, enhancements, and announcements affecting the PCC Program.

# 2 How to Organize a PCC

Once you've decided to establish or revitalize a PCC in your community, the next logical question is "How do I go about it?"

Most PCCs were formed because local Postal Service officials wanted to improve service through partnerships with their customers. Many of the steps listed below come from their experiences.

In other communities, PCCs were organized by one or more business mailers. They worked with their local Postal Service officials to get the information they needed, develop meeting topics, and secure speakers and meeting sites.

However your PCC begins, all the organizers should understand that the PCC's short-term and long-term success depends on their willingness and commitment to cooperate and work as a team.

Several steps are needed to organize a PCC, but they all have one common element: planning. The procedures below have proved successful in establishing PCCs; feel free to modify them to fit your circumstances.

1. Select co-organizers.
2. Establish the executive board.
3. Plan an organizational meeting.
4. Invite prospective members.
5. Notify Headquarters.

If you're an industry mailer interested in starting a PCC, work with your local postmaster using these steps, each of which is explained below.

## Step 1: Select Co-Organizers

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You should select one or more business mailers to help you plan an organizational meeting, recruit prospective members, and set up (charter) the council. In many cases, these co-organizers are the key players that can become your PCC's first executive board.

**Note:** Direct Postal Service competitors may not be on the executive board. (See "About This Publication" at the beginning of this book for a definition of the term "direct Postal Service competitor.")

Choosing dedicated co-organizers early in the process sets the stage for an effective council. Ask your district office, local postmaster, account representatives, customer relations coordinators, or other customer service managers for their recommendations.

## Step 2: Establish the Executive Board

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The officers and executive board shall be made up of members who exemplify the “volunteer” spirit. Participation as an officer or executive board member will entail time, effort, cooperation, leadership skills, persistence, and follow-up. A member should not agree to serve as an officer or executive board member unless he or she is able to participate as needed.

The main objective of the PCC’s officers and executive board is to meet the postal-related needs of the business community. To do this, they must promote networking, information, communication, and education to help businesses use mail as an effective and efficient communication and fulfillment media for their customers. As the “business arm” of a PCC, officers and executive board members plan, organize, and execute the meetings, events, and educational sessions that foster and maintain the working relationships between businesses that use the mail and the Postal Service.

Officers and executive board members must consider the mailing needs of all businesses in the PCC area — the goals of the PCC as a whole must take precedence over the goals of any one individual or corporation.

The executive board shall consist of elected officers and members at-large who have fixed periods of tenure in their elected positions. Examples of officers are postal co-chair, industry co-chair, secretary, and treasurer.

To encourage greater participation and diversity of opinion by PCC members on the executive board, elected members must have fixed periods of office. Two years is recommended for each elected position, with four consecutive years as a maximum tenure in any elected position. This policy is effective immediately and applies to all current officers. Any officer who has served for more than four years in his or her current position is ineligible for re-election to that position in the next election. The PCC best serves the local mailing community’s needs when all members have a voice in its operation and when there is a turnover in its elected officials.

Before the first organizational meeting, the co-organizers should meet to decide how to establish the industry co-chair (see the suggested duties in Chapter 4) and the executive board. The executive board should consist of elected officers and members at-large. Methods for determining the industry co-chair and the executive board include the following:

- For the industry co-chair:
  - The postmaster or postal co-chair appoints the industry co-chair.
  - The group of co-organizers elects the industry co-chair.

- For the officers of the executive board:
  - The co-organizers elect them.
  - The general membership elects them at the organizational meeting.

If you don't have the general membership vote for the members of the executive board, you might want to ensure the members' support by sharing this process with them at the organizational meeting.

The co-organizers should also decide how often the executive board meets. Meetings that are held monthly usually maintain the right focus and momentum.

**Note:** Any changes to elected officer status must be approved by a majority of the executive board.

**Note:** Direct Postal Service competitors may not be on the executive board.

## Step 3: Plan an Organizational Meeting

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You're now ready to begin planning the organizational meeting. To have a successful meeting, you should do the following:

- Establish objectives for the meeting.
- Choose the location.
- Choose the date and time.
- Choose the audience size.
- Develop the agenda.

### Establish Objectives

The main objective of this organizational meeting (which is different from a general meeting) is to establish and organize your PCC. You can generate and maintain the interest you need to do this by incorporating a special event in the meeting.

The event could be a tour of the Post Office or a presentation on a major Postal Service program. It could include a slide presentation, turnkey seminar, or video provided by Headquarters. It could feature a guest speaker such as a Headquarters, area, or district Postal Service official. For more information on developing presentations, see Chapter 3.

If the co-organizers selected the executive board, seek approval of the board from those attending this meeting and ask for volunteers to fill vacancies.

You'll also want to try to get support for the PCC in general from those present. Motivate them to want to be actively involved in establishing the PCC — talk about how they can benefit from the program. Enlist the help of the postal area or district office, as appropriate.

## Choose the Location

Pick a good place for your organizational meeting. Your local Post Office should have a conference room, or — if the meeting includes a meal— a local restaurant or hotel may have space. Also, a college/university or church might have a room available. Although many private firms have conference space, that resource isn't the best choice for the first meeting.

## Choose the Date and Time

The time to hold the meeting depends on several factors, including when business leaders are available. Popular timeframes are breakfast, mid-morning, lunch, dinner, and evening. A good time to tour a Post Office is during its busiest evening hours.

## Choose the Audience Size

A good size for the organizational meeting is 20 to 40 people. This ensures enough people to represent all facets of the business mailing community but not so many that the meeting is hard to direct.

## Develop the Agenda

Here's a sample PCC organizational meeting agenda:

- Introduction:
  - Describe a PCC.
  - Discuss benefits.
  - Present an overview of PCC structure.
- Business:
  - Present the proposal to establish a PCC.
  - Establish a membership committee.
  - Seek a commitment from those in attendance to participate.
  - Start planning the first general membership meeting.
- Postal Service event (see "Establish Objectives" earlier in this section).
- Question-and-answer session.

For help with preparations, see "Tips for Planning Meetings" in Chapter 3.

## Step 4: Invite Prospective Members

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There are several sources for identifying prospective members. Organizers probably already know some local business leaders who would be interested in joining.

PCCs can mail to the local USPS permit list. This list is proprietary and must be used only for official PCC purposes, and with the acknowledgment of the postmaster and/or district office. An industry mailer who is entrusted with the list for a PCC mailing must sign a non-disclosure agreement. (See Exhibit 13)

You can contact local civic leaders, such as Chamber of Commerce and Board of Trade officers, local representatives of mail equipment companies, leaders of consumer groups, small-to-large-volume mailers, and members of nonprofit organizations.

Community groups often provide enthusiastic support for a PCC. You can also buy or rent mailing lists for finding prospective members.

While identifying potentially interested local mailers, you should also consider these major firms and industries when developing your membership:

- Finance/banking
- Insurance
- eCommerce/Internet companies
- Mailing services
- Department store/wholesaler/retailer
- Mail order
- Publishing/printing
- Direct mail advertising, ad agencies, or marketing firms
- Nonprofit
- Utilities
- State/local/federal government agencies and legal firms
- Educational institutions (colleges/universities)

How do you contact these prospective members? A form letter (such as the one shown in Exhibit 1) is fine, but a personal invitation is better. You can pay them a visit or call them (although any verbal invitation you extend should be followed by a personal letter), or you or a co-organizer could send them a note. A visit by the postmaster, a Postal Service representative, or customer relations coordinator is also effective.

## Step 5: Notify Postal Service Headquarters

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Once your PCC is established, let Headquarters know so that your PCC can get important announcements and relevant information. Use the notification form shown in Exhibit 2, or provide feedback via the PCC Web site, which is accessible at [www.usps.com/nationalpcc](http://www.usps.com/nationalpcc).

Exhibit 1

**Sample Invitation to Organizational Meeting**



[Date]

Dear [customer]:

One good way for business mailers to discuss mailing issues and keep in touch with changes in the U.S. Postal Service is by participating in a Postal Customer Council (PCC). These councils are established by the Postal Service in local communities to help customers make the most effective and efficient use of postal services and products. Membership in a PCC also gives you the opportunity to talk with the Postal Service about your business mailing needs.

Knowing your interest in ensuring the best possible mail service for our community, I am pleased to invite you to attend a PCC organizational meeting on [day], [date], at [time] in [location]. The purpose of this meeting is to begin planning to establish a PCC in [name of community].

I look forward to seeing you as we begin to plan for our own Postal Customer Council.

Sincerely,

[Signature]

[Typed name]

Postmaster

United States Postal Service

[Street Address]

[City/state/ZIP+4]

**Headquarters Notification Form**

## PCC Program Notification

Please provide the following information for each of your Postal Customer Councils (PCCs) and send it to the address at bottom. Remember to send in a completed form each time a new PCC is established and to notify district and area managers as well.

Name of PCC \_\_\_\_\_

Name of Industry Co-chair \_\_\_\_\_

Title \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

E-mail address \_\_\_\_\_ Telephone/Fax numbers \_\_\_\_\_

Name of Postal Co-chair \_\_\_\_\_

Title \_\_\_\_\_

Address \_\_\_\_\_

E-mail address \_\_\_\_\_ Telephone/Fax numbers \_\_\_\_\_

Name of PCC coordinator/liaison \_\_\_\_\_

E-mail address \_\_\_\_\_ Telephone/Fax numbers \_\_\_\_\_

District represented by the PCC \_\_\_\_\_

ZIP Code area(s) served by this PCC \_\_\_\_\_

Month in which elections are held \_\_\_\_\_

Number of members \_\_\_\_\_ Number of active members \_\_\_\_\_

Types of industries participating in this PCC \_\_\_\_\_

On a separate sheet, list the companies attending the PCC meetings and your suggestions on how the PCC Program can be enhanced.

Send to: PCC PROGRAM MANAGER  
CUSTOMER EVENTS  
US POSTAL SERVICE  
1735 N LYNN ST RM 4033  
ARLINGTON VA 22209-6420

PCC web site address: [www.national.pcc.usps.com](http://www.national.pcc.usps.com)

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# 3 How to Keep the PCC Active

Once your PCC is organized, it will take planning to keep it focused on the Postal Service's goal — resolving local mailing issues. This responsibility belongs mainly to the postmaster or postal co-chair, with support from the industry co-chair.

## General Membership Meetings

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Now that your PCC's foundation is established, you and the PCC executive board can hold your first general membership meeting. To plan for this meeting, you'll need to do the following:

1. Establish objectives for the meeting.
2. Choose the location.
3. Choose the date.
4. Develop the agenda.
5. Choose the time and length.
6. Publicize the meeting.

Planning and developing the first few meetings take time and effort. A good working relationship between Postal Service personnel and business mailers also contributes greatly to a meeting's success.

### **Step 1: Establish Objectives**

When establishing objectives for your first general membership meeting, you should review the mission statement of the PCC (see Chapter 1). Surveying the customers on a regular basis to discover their needs is very effective.

### **Step 2: Choose the Location**

The place to hold your meeting depends on which kind of presentation you plan (see Step 4, "Develop the Agenda") and how many people might attend. Your first general meeting could take place on Postal Service premises, in a customer's conference room, or in a hotel meeting room.

If you choose a hotel, you may ask those who attend for a reasonable donation to cover the cost of the room. If a meal is served, a donation for the meal usually covers the room rental fee as well.

Many presentations can be held at a Post Office if it has conference space. Such a location allows sessions to be scheduled either at the same time or spread out over a longer timeframe. It also lets you include tours and demonstrations in your seminars, clinics, and workshops. For instance, a demonstration of automation equipment would complement a seminar on that subject.

Other general meetings can be held in the following locations:

- Community centers or hotel conference rooms
- Local restaurants
- Libraries
- Local customers' conference rooms or auditoriums
- Colleges/universities

Try using a conference room at a member's firm for an educational presentation if you think that a tour of the firm's mailing operations would enhance the presentation.

### **Step 3: Choose the Date**

PCCs must schedule at least two general meetings a year. Three or more well-planned meetings a year would keep interest even higher. Use meetings held one to three months before the National Postal Forum to tell members about the Forum's pertinent features.

Be sure to coordinate all meeting dates with Postal Service managers as well as with the PCC members. Dates should not conflict with major holidays or religious observances, the National Postal Forum, other PCC meetings in the districts around your PCC, or other mailer-related and business-related events in the area because attendance and speakers can be affected.

### **Step 4: Develop the Agenda**

The sample agendas in Exhibit 3 and Exhibit 4 will help in developing an agenda suitable for your meeting. Remember, the samples represent only basic types; survey members regularly so you can modify them to maintain the interest and enthusiasm of your members while meeting the PCC's objectives — educating mailers about the Postal Service and resolving mailing issues at the local level.

Postal Service customers need to know about the many quality products and services the Postal Service offers; presentations supply this information in an interesting and stimulating way. The two basic types — educational presentations and special events — are discussed later in this chapter.

### **Step 5: Choose the Time and Length**

The time of day to have the meeting depends on the kind of presentation planned. The sample agendas for the first and subsequent general meetings ( Exhibit 3 and Exhibit 4 ) include suggested times.

Morning sessions tend to be more successful and popular for most PCCs. Meetings without other major events should last no longer than two hours. Every meeting should begin and end on time.

## **Step 6: Publicize the Meeting**

PCC meetings are open to all mailers, so advertise your meetings well. You might work with customer service at your local district to advertise at all Postal Service locations.

Below are ways to announce your meetings besides in your newsletter (some might also help you identify prospective members).

- The postmaster or postal co-chair can send a letter inviting all permit holders, Express Mail customers, business reply account holders, and meter licensees. Exhibit 5 shows a sample letter. The letter should give the date, time, place, and type of presentation.
- Post an announcement in the lobbies of all stations and branches, bulk mail center acceptance units, business mail entry offices, and Postal Service business centers. Place it where everyone can see it.
- Use newspapers, radio, and television. You can usually use public service announcements — simply supply a news release announcing the event four to six weeks before the event. For big events, follow up with another notice to the media one week before the event.
- Extend personal invitations. Industry members should feel free to invite other interested industry leaders.
- Postmasters or postal co-chairs can use account management profiles. Don't overlook existing Postal Service customers when sending your invitations. Also, give account representatives and customer relations coordinators extra copies for those who didn't get an invitation.
- Promote the meeting at various group mailer meetings (such as bulk mail preparation classes, barcoding instruction sessions, and other mail industry association meetings) and local civic meetings (such as Chamber of Commerce and local charity meetings).

## Exhibit 3

**Sample Agenda for First General Meeting****First General Membership Meeting****Register:** 8:00 a.m.**Begin:** 8:30 or 9:00 a.m.**End:** 12:00 noon**Location:** Area, district, or bulk mail center (BMC); hotel; civic auditorium; etc.**Refreshments:**

- Coffee, tea, juice, croissants, pastries, bagels.

**Agenda (postmaster presides):**

- Introduction of postal managers and account representatives or customer relations coordinators.
- Brief description of PCC Program.
- Brief presentation on benefits of being an active member.
- Intermission: refreshments.
- Presentation on a priority postal program (for example, how mailpiece design, barcoding, Express Mail, Priority Mail, or Presort First-Class Mail can save money).
- Election of industry co-chair (if not previously selected by the postal co-chair).
- Introduction or election of executive board.
- Question-and-answer session (oral or written).
- Closing remarks by postal co-chair (or industry co-chair, if previously selected).
- Distribution of local USPS organizational chart with telephone numbers for key USPS personnel.
- Informal survey regarding newsletter participation.
- Announcement of next meeting: date, time, place, type, guest speaker, and cost.
- "Consultation center": postal officials discuss local mailing concerns one-on-one with members.

**Funding:**

- Needed only for refreshments.

**Logistics:**

- Invitation to area management.
- Invitations mailed in advance.
- Directions (map, parking area).
- Publicity (news release to media).
- Confirmation of reservations.
- USPS employee notification of meeting.
- Audio/visual and room set-up.
- Printed agenda.
- Memento to participants at meeting.
- Signs directing customers to meeting room.
- Materials and handouts.
- Critique (evaluation card, request for topic suggestions for future meetings).

**Sample Agendas for Subsequent General Meetings**

**Breakfast Meeting**

**Register:** 7:30 a.m.

**Begin:** 8:00 a.m.

**End:** 9:30 or 10:00 a.m.

**Location:**

Area, district, BMC, hotel, community center, or customer premises (although a customer location is not suggested for the first meeting).

**Menu:**

Full breakfast or coffee, tea, juice, croissants, pastry, bagels.

**Agenda:**

- Key event: main speaker or audio/visual presentation on a priority program by manager of Customer Service and Sales.
- Question-and-answer period.

**Funding:**

- Contribution per person attending to cover costs.

**Logistics:**

- Invitation to area management.
- Invitations mailed in advance.
- Directions (map, parking area).
- Publicity (news release to media).
- Confirmation of reservations.
- USPS employee notification of meeting.
- Audio/visual and room set-up.
- Printed agenda.
- Key participants' review of preparations.
- Signs directing customers to meeting room.
- Materials and handouts.
- Critique (evaluation card, request for topic suggestions for future meetings).
- Personal welcome to first-time guests.

**All Day Meeting**

**Register:** 7:30 a.m.

**Begin:** 8:00 a.m.

**End:** 4:00 p.m.

**Location:**

Area, district, BMC, hotel, community center, or customer premises (although a customer location is not suggested for the first meeting).

**Menu:**

Breakfast pastries; low-cost platter. Buffet suitable if attendance is small. Coffee, tea, juice, soft drinks for breaks.

**Agenda:**

- Priority program presentation (when appropriate) on USPS current events (like service changes, rate changes, etc.).
- Breakout session: rooms or panels. Types: by class; by program.
- Audio/visual presentation (for example, automation).
- Luncheon.
- Keynote speaker.
- Question-and-answer session.

**Funding:**

- Contribution per person attending to cover costs (food, advertising, space, name tags, etc.).

**Logistics:**

- Invitation to area management.
- Invitations mailed in advance.
- Directions (map, parking area).
- Publicity (news release to media).
- Confirmation of reservations.
- USPS employee notification of meeting.
- Audio/visual and room set-up.
- Printed agenda.
- Key participant review of preparations.

Exhibit 4 (p. 2)

**Sample Agendas for Subsequent General Meetings**

|  |  |
|--|--|
| <p><b>Dinner Meeting</b></p> <p><b>Register:</b> 5:00 p.m.<br/> <b>Begin:</b> 5:30 p.m.<br/> <b>End:</b> 8:30 p.m.</p> <p><b>Location:</b><br/> Local restaurant or hotel (although a hotel is not suggested for the first meeting).</p> <p><b>Agenda:</b></p> <ul style="list-style-type: none"> <li>▪ Social hour (postal employees and PCC executive board members should circulate during this time).</li> <li>▪ Catered dinner.</li> <li>▪ Opening remarks by postal co-chair.</li> <li>▪ Key speaker (Headquarters — if audience is 150 or more — or area) with time for question-and-answer period.</li> <li>▪ Closing remarks by industry co-chair.</li> </ul> <p><b>Funding:</b></p> <ul style="list-style-type: none"> <li>▪ Contribution per person attending.</li> </ul> <p><b>Logistics:</b></p> <ul style="list-style-type: none"> <li>▪ Invitation to area management.</li> <li>▪ Invitations mailed in advance.</li> <li>▪ Directions (map, parking area).</li> <li>▪ Publicity (news release to media).</li> <li>▪ Confirmation of reservations.</li> <li>▪ USPS employee notification of meeting.</li> <li>▪ Audio/visual and room set-up.</li> <li>▪ Printed agenda.</li> <li>▪ Key participants' review of preparations.</li> <li>▪ Signs directing customers to meeting room.</li> <li>▪ Materials and handouts.</li> <li>▪ Critique (evaluation card, request for topic suggestions for future meetings).</li> <li>▪ Personal welcome to first-time guests.</li> </ul> | <p><b>Evening Meeting (With Tour)</b></p> <p><b>Register:</b> 5:30 p.m.<br/> <b>Begin:</b> 6:00 p.m.<br/> <b>End:</b> 8:30 p.m.</p> <p><b>Location:</b><br/> Area, district, or BMC; customer/member conference facilities.</p> <p><b>Refreshments:</b><br/> Coffee, tea, soft drinks, hors d'oeuvres.</p> <p><b>Agenda:</b></p> <ul style="list-style-type: none"> <li>▪ Opening remarks by postal co-chair.</li> <li>▪ Introduction of postal managers (such as district managers, manager of Customer Service and Sales, plant managers) and account representatives or customer relations coordinators.</li> <li>▪ Postmaster comments on any current items or local concerns.</li> <li>▪ Key event: tour of facility.</li> <li>▪ Question-and-answer session.</li> <li>▪ Closing remarks by industry co-chair.</li> </ul> <p><b>Funding:</b></p> <ul style="list-style-type: none"> <li>▪ Contribution per person attending.</li> </ul> <p><b>Logistics:</b></p> <ul style="list-style-type: none"> <li>▪ Invitation to area management.</li> <li>▪ Invitations mailed in advance.</li> <li>▪ Directions (map, parking area).</li> <li>▪ Publicity (news release to media).</li> <li>▪ Confirmation of reservations.</li> <li>▪ USPS employee notification of meeting.</li> <li>▪ Audio/visual and room set-up.</li> <li>▪ Coordination with mail processing staff on which areas are to be toured.</li> <li>▪ Tour guide selection.</li> <li>▪ Printed agenda.</li> <li>▪ Signs directing customers to meeting room.</li> <li>▪ Materials and handouts.</li> <li>▪ Clearance with security for visitor passes.</li> <li>▪ Critique (evaluation card, request for topic)</li> </ul> |
|--|--|

**Sample Invitation to General Meeting**



[Date]

Dear [customer]:

Because you are a valued customer, you are invited to join us at a meeting of the [name] Postal Customer Council. We will provide opportunities there for the exchange of ideas and suggestions and to discuss the latest innovations in Postal Service products and services.

The next meeting is scheduled for [date] at [time] at [location]. As always, the meeting will be an informal blend of lively discussions, reports on local news from council officers, and a [breakfast, luncheon, or dinner] featuring [name] as our guest speaker. [He/she] is planning to speak to us about [topic].

[Provide brief biography paragraph of speaker.]

Business sessions will be held from [time] to [time] to discuss specific mailing issues and to answer any questions you may have. Speakers for this meeting's sessions include:

- [Speaker's name and Topic]
- [Speaker's name and Topic]

To reserve a seat at the [breakfast, luncheon, or dinner], complete the enclosed reservation card and send it with your check for \$[amount] per person, payable to [name]. If you would like to attend any of the business sessions, please indicate this on your reservation card.

I believe you will find the program rewarding and hope you will be able to join us.

Sincerely,

[Signature]

[Typed name]  
Industry Co-chair

[Signature]

[Typed name]  
Postmaster/Postal Co-chair

## Tips for Planning Meetings

---

This section provides a comprehensive checklist to help you plan both organizational and general membership meetings. It's divided into three phases:

- Before the meeting (long-term and short-term).
- During the meeting.
- After the meeting.

### Before the Meeting

The foundation for a successful PCC meeting is laid long before the actual event. These pre-meeting activities are divided into the following two groups based on how far in advance they should be addressed:

#### Long-Term

Do the following well in advance of the meeting (weeks or months):

- Determine from surveys what members are interested in.
- Determine the purpose (objectives) of this meeting.
- Determine the type of meeting to be held.
- Determine the best time to hold the meeting.
- Confirm date and time with the executive board to avoid scheduling conflicts involving business mailers, Postal Service officials, the National Postal Forum, PCC Day, major holidays or religious observances, or other concurrent events/meetings.
- Contact the meeting place to arrange a date, room facilities, and price.
- Choose a guest speaker and alternate.
- Issue invitation to your guest speaker. Inform guest speaker:
  - Where to speak.
  - When to speak.
  - How long to speak.
  - Whether and where he or she will be met (e.g., airport, lobby, etc.).
  - Whether there will be a question-and-answer session.

Request guest speaker biography and determine audio/visual needs for presentation.

## Short-Term

Do the following as the meeting date approaches:

- Develop an estimate of all funding that will have to be covered.
- Mail invitations to members, with an order form for reservations and an addressed return envelope.
- Provide for people with disabilities. For example, make sure there's enough room to maneuver wheelchairs, and provide an interpreter if you know of a hearing-impaired person who wants to participate.
- Mention the meeting to other interested people and organizations, including Postal Service employees and plant managers.
- Check that promotion and publicity for the meeting have been prepared, and issue a press release to local media. Arrange for a photographer and media coverage.
- Arrange room set-up. Provide drinking water and a glass at the podium. Arrange for any special equipment (e.g., overhead projector, VCR, audio/visual equipment, microphones, etc.). Decide whether there will be a head table and, if so, the number of place settings and tent cards.
- Put badges or name tags in alphabetical order (use large type for names) and assign a member to distribute them. Have blank name tags available for walk-up guests to fill in as they arrive.
- Provide tickets or a check-in table as needed.
- Place question and evaluation cards at each table or on each chair in the audience.
- Think about suggesting a few questions to persons in the audience to get the question-and-answer session going.

## During the Meeting

Aside from participating in the meeting, plan to do the following:

- Keep room temperature comfortable.
- Stay on schedule.
- Listen for any disturbances from waiters, ringing telephones, etc.

## After the Meeting

Either at the end of the meeting or afterward, be sure to do the following:

- Accompany the speaker to the exit.
- Send a note of thanks to the speaker.
- Prepare a critique of the meeting.

## Do's and Don'ts of PCC Meetings

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To ensure that your meeting succeeds, here are some tips to keep in mind and pitfalls to avoid:

### **Do**

- Plan carefully.
- Be well organized.
- Pay attention to details.
- Project a good image and professional manner.
- Solicit members' comments and suggestions for improvements or topics.
- Consider travel time for members.
- Start and end on time.
- Conduct trial runs, if necessary.
- Provide appropriate accommodations for members.
- Clearly identify the location of the meeting room.

### **Don't**

- Force participation.
- Allow individual participants to dominate or control the meeting.
- Let the schedule become too rigid because of too many activities.
- Ask direct ("yes" or "no") questions when you want to stimulate a discussion.
- Ask people to defend their personal opinions.
- Allow direct Postal Service competitors a forum either as an officer/board member, a speaker, or a vendor.

The sample task delegation list in Exhibit 6 will help you coordinate assigning responsibilities for these meetings or sessions. Decide how to delegate the responsibilities at executive board or committee meetings.

**Sample Task Delegation List for Meeting Preparation**

**Task Delegation List**

***Council Meeting Schedule***

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Location: \_\_\_\_\_

Type of meeting: \_\_\_\_\_

***Tasks (Fill in the name of the person delegated)***

Plan agenda: \_\_\_\_\_

Arrange all funding: \_\_\_\_\_

Select and invite speakers: \_\_\_\_\_

Confirm speakers' arrangements: \_\_\_\_\_

Complete meeting accommodations: \_\_\_\_\_

Prepare first mailing to prospects or members: \_\_\_\_\_

Arrange publicity: \_\_\_\_\_

Arrange menu or refreshments: \_\_\_\_\_

Prepare second mailing to prospects or members: \_\_\_\_\_

Arrange audio/visual and room set-up: \_\_\_\_\_

Arrange for name tags and registration: \_\_\_\_\_

Make VIP telephone invitations: \_\_\_\_\_

Confirm telephone invitations by letter: \_\_\_\_\_

Send thank-you letters after meeting: \_\_\_\_\_

## Educational Presentations

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Today, more and more councils are sponsoring educational presentations for their members. These presentations teach council members about specific Postal Service products and services or about mail preparation requirements. Titles can cover such topics as “Mail Center Management” or “Advertising Mail: A Key Ingredient in Your Marketing Mix.”

Educational presentations benefit both Post Offices and PCC members in several ways. Members (business mailers) learn about the Postal Service policies and procedures that affect their daily business and how to mail more effectively and economically. The Postal Service gains in productivity because of mailers’ addressing and preparation improvements. And all participants enjoy an enlightening exchange of information and ideas.

### Types of Educational Presentations

Below are three combinations of educational relationships you can foster through PCC presentations:

- The Postal Service can educate mailers through:
  - Clinics, workshops, and seminars;
  - Tours of mail facilities and Postal Service operations; and
  - Joint PCC-postal business center seminars.
- Mailers can educate the Postal Service through:
  - Mailers’ focus groups, which provide feedback on performance and customer service. The groups can be service-oriented (product-user groups) or industry-oriented (industries with similar needs); and
  - Interactive sessions (involving local Postal Service managers and customers) such as panel discussions and question-and-answer sessions.
- Mailers can educate other mailers through:
  - Industry exchanges and roundtables;
  - Networking social events;
  - Cross-training opportunities for mailing managers, both within their industry and with other industries; and
  - Tours of customer facilities and mailing operations.

Typical educational presentations — seminars, clinics, workshops, and mail center management courses — lend themselves well to council meetings. These presentations create a satisfactory and meaningful dialogue between Postal Service customers and Postal Service personnel.

Seminars, clinics, and workshops help mailers and Postal Service officials become better acquainted and gain a better understanding of one another’s needs and concerns.

## **Seminars**

Each seminar may be headed by a major mailer, a local Postal Service official, a national or area Postal Service representative, or all three. A seminar that features one speaker differs in some ways from a seminar with multiple speakers.

A one-person presentation requires a person who is highly qualified (through knowledge and experience) to discuss the given subject. Normally, he or she makes a presentation, then opens the meeting for questions and answers. Comments and suggestions are welcome and are passed on to appropriate officials for consideration and action.

A panel session, on the other hand, requires several people. Although they also must have enough knowledge and experience to be qualified to discuss the topic, forming a panel group gives more options from which to choose. In creating a panel, consider these combinations of resources:

- Local Postal Service employees.
- Local Postal Service employees and local customer .
- Local Postal Service employee, area Postal Service official, and local customer.
- Local Postal Service employee, area Postal Service official, and Headquarters Postal Service official.

You don't need a set number of panelists, but no more than five panelists should take part in any one session. Panel sessions are conducted by a moderator, who sees that the agenda is followed and defers unrelated questions until after the meeting. More information on requesting Postal Service speakers appears later in this chapter.

## **Clinics and Workshops**

These presentations usually emphasize the exchange of ideas and the demonstration of techniques and processes. The main ingredient in a clinic or workshop is audience participation — sharing ideas and suggestions that mailers have found successful.

Large councils have successfully divided the clinics or workshops into sessions broken out by topic (such as automation standards, mail preparation, and postage payment) or by product (such as Express Mail® or Priority Mail®). This allows members to choose a session that relates to their particular area of interest.

## **Mail Center Management Courses**

These courses are designed for new or seasoned mail center employees or managers and may cover all phases of Postal Service operations and procedures. Some appropriate subjects include the following:

- Mail classification.
- Mail make-up and preparation.
- Methods for elevating the image of your mail center in your organization.

- Methods for motivating mail center personnel.
- Methods for managing a diverse work force in your mail center.
- Accounting principles for the mail center manager.

## Topic Suggestions

New regulations and guidelines and good mailing practices can be explained at any of these educational presentations. Seminars, clinics, and workshops are particularly suited to new products and services because they provide opportunities for discussion between local business customers and local Postal Service officials/managers. Topics for presentations are limited only by the imagination and the needs of the local mailing/Postal Service community.

While Postal Service products and services change on a regular basis to meet the customers' needs, here are some current topics to feature in presentations:

- Address quality and list management
- "Ad Mail" your way to business and profitability
- Automation/Prebarcoding
- Business continuity planning (disaster planning) · CONFIRM®
- Confirmation services (delivery confirmation/signature confirmation)
- Creation of a corporate mail services guide
- Customized Postal Service packaging
- Database marketing
- Employee satisfaction for profit
- Expedited package service offering
- Free consultants — USPS officials/managers
- General mail center management principle
- Hard copy mail as a communication medium
- How to choose a vendor
- International mail
- Interpersonal skill
- Mail center ergonomics
- Mail center security
- Mail in an eCommerce environment
- Mail piece design
- Mail transport equipment
- Manifest mailing systems
- MERLIN
- Navigating the USPS Web site
- Nonprofit mail policies and procedures
- Oral presentations — before 1 or 100
- Palletization

- Periodicals
- Personnel management
- PostalOne!
- Private express statutes
- Quality principles
- Rates and classification issues
- Special services
- Stress management
- Training for success
- Writing proposals

## Event-Related Presentations

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One of the most beneficial special events is a tour of Postal Service facilities. These tours are among the most effective events that council members can plan. Tours let business mailers see firsthand the sophisticated machinery and experienced employees that process their business mail.

Tours can also provide the background for certain procedures and guidelines that the Postal Service has established. Mailers can see how the procedures are used to facilitate handling the tremendous volume of daily mail as efficiently and economically as possible.

The operation that processes more than 205 billion pieces of mail each year must be seen to be appreciated, and it can be seen through a Postal Service facility tour. Here are some suggestions for planning such a tour:

- Provide a brief orientation before the tour.
- Coordinate the tour route in advance.
- Select competent and articulate tour guides.
- Avoid Postal Service jargon.
- Schedule evening tours during peak processing hours.
- Determine the largest group size in which everyone can see and hear the guides.
- Have tour guides use wireless microphones.

## Suggestions for Planning Presentations

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Once you've chosen the type of presentation, date, and location for your meeting, you can plan the presentation itself. Start with these elements:

- Objective
- Audience

## Objective

Whether you plan an educational or an event-related presentation, you should have an overall goal for the presentation. For example, a presentation that covers preparing mail for automation might be appropriate if your meeting's main objectives include:

- Promoting prebarcoding or addressing and readability standards.
- Training the members on procedures and guidelines.
- Making customers more aware of automation issues.
- Helping you formulate a presentation objective, consider the following questions:
  - Who will the audience consist of?
  - Where will the meeting be held?
  - When will the meeting be held?
  - What issue do you want to target?

## Audience

Although it's hard to tell exactly who the audience members will be, try to identify them in relation to the type of meeting and presentation you're planning.

To continue the automation example, your audience might include the following:

- Current prebarcoding customers.
- Potential new customers.
- Executives and financial decision makers.
- Mail center employees or supervisors.

Through the presentation the mailers in your audience should learn something new that can benefit their businesses and, in the process, help them see the value of PCC membership.

## Speakers

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When planning a PCC presentation, choosing the right speakers is important. Whether they are qualified Postal Service personnel or industry personnel, speakers should have proven presentation skills.

### Postal Service Speakers

The Postal Service has knowledgeable and experienced managers who would be glad to address a PCC, and you should consider using them as presentation speakers. At the local level, highly qualified Postal Service staff members with various specialties are available to speak. They may be from sales, customer service, processing and distribution, delivery, finance, or transportation, and their area of expertise would be matched with the planned topic.

Sometimes Postal Service officials address PCCs or take part in presentations. The guest speaker may be a Postal Service executive from Headquarters, an area manager, or a member of their staff. Generally, to justify using the Postal Service's executive speaking resources, audiences for such speakers should include at least 150 people.

## Area or Headquarters Speakers

PCCs can request Postal Service speakers through their sponsoring postmaster or postal co-chair. To be sure requests for area or Headquarters speakers are handled properly, the postal co-chair should do the following:

- Submit all requests at least 8–10 weeks before the meeting; copy and complete the "Request for Speaker" form supplied in Exhibit 7.
- Allow as much time as possible for the request. Many Headquarters and area personnel are asked to speak frequently and may be committed to other speaking engagements.

**Note:** Headquarters and area speaker resources are very limited within 30 days of National Postal Forum events.

- Use the checklist for meeting preparations in Exhibit 8 to assign and coordinate the responsibilities discussed in this section.

## Headquarters (Officers-Only) Speakers

If your PCC would like a Headquarters officer to speak, send the request to the Headquarters address below at least 8–10 weeks before the meeting. If you want a particular speaker, include the name of the speaker in the request. Do not contact officers directly. Send a copy of the request to the area vice president, district manager, and postal co-chair or postmaster.

SPEAKER'S BUREAU  
PUBLIC AFFAIRS AND COMMUNICATIONS  
US POSTAL SERVICE  
475 L'ENFANT PLAZA SW RM 10523  
WASHINGTON DC 20260-3122

## Area Speakers

If your PCC would like someone from the area to speak, send the request to the district office 8–10 weeks before the meeting. If you want a particular speaker, include the name of the speaker in the request. The district office will review the request and then forward it to the area office. The postal co-chair or postmaster, as well as the district office, should keep a copy of the request.

## Industry Speakers

If your council requests someone other than a Postal Service official to speak at a PCC meeting, you should make sure that all the speaker's comments will be aligned with the goals listed in the PCC mission statement (see Chapter 1). Be aware that your local PCC will be responsible for any fees charged by the speaker.

**Note:** The focus of PCCs is Postal Service-related. Speakers for products and services that directly compete with the Postal Service are not permitted.

Exhibit 7

**Request for Speaker Form**

**Request for Speaker**

***Speaker Information***

Name of speaker requested: \_\_\_\_\_

Alternative speakers: \_\_\_\_\_

Suggested speech topics: \_\_\_\_\_

Length of speech: \_\_\_\_\_ Size/type of audience: \_\_\_\_\_

Name of requester: \_\_\_\_\_

Group/firm/organization: \_\_\_\_\_

Contact telephone: \_\_\_\_\_

***Background Information***

Type of meeting: \_\_\_\_\_

Date and time: \_\_\_\_\_ Is date flexible? \_\_\_\_\_

Location: \_\_\_\_\_

Size of audience expected: \_\_\_\_\_

***PCC Information***

Name of PCC: \_\_\_\_\_

Postal district: \_\_\_\_\_

Postal co-chair: \_\_\_\_\_ Telephone: \_\_\_\_\_

Full address: \_\_\_\_\_

Industry co-chair: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Full address: \_\_\_\_\_

\*\*\*\*\*

**If requesting an area/regional official to speak, send this form to the district//Sales Center office, which will review it and forward it to the area Marketing/Regional Sales office.**

Exhibit 8  
**Sample Checklist for Meeting Preparation**

| Task and Date   | Person Responsible | Task Completed |
|---|--------------------|----------------|
| <b>8–10 Weeks Before Meeting</b>  |                    |                |
| Pick the topic and speakers   |                    |                |
| Determine audience type and size  |                    |                |
| Draw up invitation list   |                    |                |
| Select meeting time and place   |                    |                |
| Send written request for Headquarters or area speaker   |                    |                |
| <b>4–6 Weeks Before Meeting</b>   |                    |                |
| Outline agenda  |                    |                |
| Prepare letters and invitations   |                    |                |
| Order handouts  |                    |                |
| <b>3 Weeks Before Meeting</b>   |                    |                |
| Mail invitation letters   |                    |                |
| <b>2 Weeks Before Meeting</b>   |                    |                |
| Make telephone invitation calls   |                    |                |
| Plan refreshments   |                    |                |
| <b>4-5 Days Before Meeting</b>  |                    |                |
| Check attendance list   |                    |                |
| <b>2–3 Days Before Meeting</b>  |                    |                |
| Prepare name badges   |                    |                |
| <b>1–2 Days Before Meeting</b>  |                    |                |
| Conduct rehearsal (if necessary)*   |                    |                |
| Prepare final agenda  |                    |                |
| Set up meeting room (A/V)   |                    |                |
| <p><i>These typical preparation activities and approximate start dates may need to be modified according to your own special conditions. You may need to add or remove activities or change dates.</i></p> <p><i>*Suggested if panel member has not previously presented.</i></p> |                    |                |

## Postal Service Resources

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Providing current and accurate information to its customers is a major objective of the Postal Service. A newly established or revitalized council will want to tell its members about Postal Service resources and how the members can use those resources. Below are some publications and additional resources that can supply this information.

### Keeping Posted

"Keeping Posted" is a special PCC-related column that appears approximately four to six times a year in *Memo to Mailers*. It publishes stories and announcements regarding the PCC community and it recognizes PCC successes so that they may be replicated nationwide. Please send your information to the PCC Program manager via the Web site at [www.usps.com/nationalpcc](http://www.usps.com/nationalpcc).

### Memo to Mailers

This newsletter is published monthly at no charge for all members of PCCs and other mailers. It contains information on current Postal Service programs and services, stories on and by business mailers, and promotions of PCC activities. For a free subscription, write to:

MEMO TO MAILERS  
NATIONAL CUSTOMER SUPPORT CENTER  
US POSTAL SERVICE  
6060 PRIMACY PKWY STE 101  
MEMPHIS TN 38188-0001

### The Postal Bulletin

The *Postal Bulletin* has the latest information on rates, philately, automation, Express Mail, presort, and international products and services. It also provides advance notice of important changes in regulations and policy. The *Postal Bulletin* is published every two weeks and is available by subscription from the following address:

SUPERINTENDENT OF DOCUMENTS  
US GOVERNMENT PRINTING OFFICE  
PO BOX 371954  
PITTSBURGH PA 15250-7954

## **Domestic Mail Manual**

The *Domestic Mail Manual* (DMM) contains the Postal Service's standards for use of domestic mail services. It includes a detailed description of each class of mail and special services available to the public. Published by the Postal Service, the DMM is available by subscription from:

SUPERINTENDENT OF DOCUMENTS  
MAIL STOP SSOM  
732 N CAPITOL ST NW  
WASHINGTON DC 20402-9375

## **Postal Explorer**

Postal Explorer includes the DMM and IMM, rate calculators, zone charts, the Postage Statement Wizard, and much more. Postal Explorer is available free on the Internet at <http://pe.usps.gov>, and on CD-ROM. For ordering information, price, and system requirements for the CD-ROM version, access <http://pe.usps.gov> and then click *About Postal Explorer*.

## **International Mail Manual**

The *International Mail Manual* (IMM) contains the Postal Service's standards for use of international mail services. It includes detailed regulations on postage rates and services regarding mail bound for other countries. The IMM is available by subscription from:

NEW ORDERS  
SUPERINTENDENT OF DOCUMENTS  
PO BOX 371954  
PITTSBURGH PA 15250-7954

## **Publication 51, International Postal Service Rates and Fees**

This handy reference contains the international mail information most often needed by mailers. It's available on request from postmasters, account representatives, and customer relations coordinators.

## **Other Publications**

Many books, booklets, and brochures highlight current Postal Service products and services. These are available on request from the material distribution centers through postmasters, local Postal Service representatives, and customer relations coordinators.

## **National Postal Forums**

National Postal Forums give Postal Service and mailing industry management the chance to exchange ideas and develop a more responsive, efficient mail service. Postal Forums, like conferences in the private sector, consist of seminars, workshops, exhibits, and social activities. To become

better business professionals, business mailers look to the forums for the following:

- Information on general business issues, trends, and opportunities.
- Up-to-date and reliable information on methods and developments in mailing services.
- Opportunities to exchange information with other mailers, Postal Service officials, and other PCCs.
- Access to exhibitors and vendors.

Two National Postal Forums are held annually in different locations around the country. The registration and exhibit booth rental fees are subject to change. For information on National Postal Forums, write to:

NATIONAL POSTAL FORUM  
3998 FAIR RIDGE DR STE 300  
FAIRFAX VA 22033-2907

## Other Postal Customer Councils

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In some parts of the country (where customer membership geographically involves several postmasters), a PCC may cover more than one area. This type of PCC keeps its focus local and is not considered an affiliation between PCCs.

Because every PCC's goal is to bring mailers together with their local Postal Service officials, the Postal Service does not sanction formal affiliation between different PCCs— such as a “statewide PCC” — but we do recommend informal sharing of information among PCCs.

Ask other PCCs to add you to their mailing lists (for newsletters, meeting notices, etc.). This networking can help you improve your own PCC Program. Reciprocate by adding them to your mailing list. Also, be sure to include the Headquarters PCC Program manager at the following address:

PCC PROGRAM MANAGER  
SERVICE AND MARKET DEVELOPMENT  
US POSTAL SERVICE  
1735 N LYNN ST RM 4033  
ARLINGTON VA 22209-6420

## Support Presentations

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The Postal Service frequently develops presentations for PCC meetings, mailers, workshops, seminars, or clinics. These turnkey seminars include CD-ROM, slide-script, video presentations on new Postal Service products, or films on the most current special program or service. There are also many brochures, bulletins, and newsletters for PCCs. Please contact your local district or Post Office for these materials.

## PCC Materials

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You can contact the material distribution center to order PCC materials such as Publication 218, *An Invitation to Join Your Postal Customer Council*; Notice 12, *Postal Customer Council Membership Certificate*; and additional copies of Publication 286, *Postal Customer Council Program*.

**Note:** Basic templates of some of these materials are available on the PCC Web site for local PCCs to download and customize. More materials will be added in the future.

# 4 How PCCs Are Authorized and Governed

As the organizing or revitalizing of your PCC progresses, it's a good idea to appoint a committee to develop its bylaws and a description of the duties of its officers. Once the bylaws are presented to the executive board, they should be ratified by the general membership.

As a guide, a sample set of bylaws is shown in Exhibit 9, a sample set of officer duties in Exhibit 10, and a sample set of committee duties in Exhibit 11. Questions about more permanent organizational structures should be directed to the PCC Program manager at Postal Service Headquarters.

There are more than 250 active councils throughout the United States. Because each is operated independently of the others, regulations are necessary for governing them; these regulations are listed below. Members should review these policies and regulations during the organizing or revitalizing period to avoid misinterpretation and to assure consistency.

The regulations are grouped under the following headings:

- Criteria for designation as a PCC.
- Violation of Postal Service policies.
- Policy on PCC meetings.
- Policy on PCC speakers, exhibitors, and competitors.
- Policy on public issues.
- Policy on newsletters, bulletins, or mailing lists.
- Policy on payment of postage.
- Policy on nonprofit status.
- Policy on rebates.

Exhibit 9 (p. 1)  
**Suggested Bylaws**

## **Suggested Bylaws of the Postal Customer Council of [Location]**

### **Article I: Name**

This organization shall be known as the Postal Customer Council of [location] or [location] Postal Customer Council (PCC).

### **Article II: Objectives**

The PCC's objectives are to foster the best postal service possible, to seek communication and cooperation between customers and the Postal Service, and to develop ideas and suggestions regarding the improvement of postal service.

### **Article III: Membership**

Any mailer presenting mail in the ZIP Code area [ZIP Code] known as [Post Office name] may belong to the organization. A mailer may be a member of more than one PCC, but it is recommended that he/she not be an officer of multiple PCCs.

### **Article IV: Fees**

The executive board is authorized to solicit reasonable dues, contributions, and donations from the members in support of an annual budget. This budget shall be used to underwrite PCC Programs such as educational presentations, training seminars, a newsletter, and meetings. The annual budget outlines operational expenses for the PCC. The contributions and donations are not intended to make the PCC a profit-making organization but to support the programs that benefit the members. No one should be excluded from participating in the PCC because of the inability to make donations or contributions.

### **Article V: Officers**

**Section 1.** The officers of this organization shall be a Postal Co-chair (the postmaster, a Postal Service executive, or designee), Industry Co-chair, Vice-Chair, Treasurer and Secretary. Fixed terms of office are recommended for industry representatives. All of the above shall be voting members and shall make up the officers and members of the executive board. [These officers are recommended; additional officers – for example an Events or postal vice-chair – may be added. Their voting status should be determined and published in the by-laws. The elected term of office for industry members is recommended at two years per position held, with four consecutive years in a particular position as a maximum.]

**Section 2.** The postmaster or Postal Service manager (as the Postal Co-chair) or a representative shall attend all meetings representing the U.S. Postal Service. The Postal Co-chair, designee, or Industry Co-chair shall sign all vouchers (invoices) as approved by the executive board. The Postal Co-chair, Industry Co-chair, and treasurer shall maintain records of all monies received, and account for all monies paid out for approved disbursements authorized by the executive board.

The Postal Co-chair or designee or industry Board member shall maintain the PCC mailing list in accordance with the requirements of ASM 352.451. Officers shall ensure that a nondisclosure contract is signed by any outside source that uses the mailing list. The Postal Co-chair, designee, or Industry Co-chair shall sign all contracts and agreements, with the approval of the executive board.

**Section 3.** The Industry Co-chair, if present, or Postal Co-chair shall preside at all meetings of this organization. In their absence, the Vice-Chair shall preside. The executive board shall approve all disbursements from the PCC account and shall monitor the account on a quarterly basis.

**Section 4.** The Secretary shall maintain minutes of all meetings.

### **Article VI: Nominations, Elections, and Changes**

Nominations of officers shall be held at an official executive board meeting when necessary to fill vacancies. Nominations shall be presented to the executive board for election, with ratification by the general PCC membership, at least annually. A majority vote is necessary for election to office. A majority of the executive board members must be present to hold an official executive board meeting. Any changes to elected officer status must be approved by a majority vote of the executive board.

**Note:** *Direct Postal Service competitors may not be on the executive board.*

**Suggested Bylaws**

**Suggested Bylaws of the Postal Customer Council of [Location]**

***Article VII: Amendments***

Amendments to these bylaws shall be by majority vote of the executive board [or by majority vote of the general membership if that option is preferred].

***Article VIII: General Meetings***

A general meeting shall be held at least once a year.

***Article IX: Proceedings***

The proceedings of the organization, where not covered by the bylaws of this organization, shall be governed by Robert's Rules of Order.

***Article X: Distribution of Assets on Dissolution***

In the event the Postal Customer Council of [location] is dissolved, the assets shall be converted to cash and distributed on a pro rata basis to those who made contributions to the organization during the last PCC activity.

***Article XI: Violations of PCC Policy***

**Section 1.** If a member of the executive board is believed to have violated PCC regulations, the board must immediately place the member on a leave of absence from the PCC executive board until a resolution is reached.

**Section 2.** The executive board will review all allegations and determine whether the member violated regulations.

**Section 3.** If the board finds that the member has violated regulations, that member is automatically removed from office and replaced.

## Exhibit 10

**Suggested Officer Duties****Suggested Duties of Officers**

All PCC officers should be enthusiastic and dedicated to the council's objectives, should contribute to the overall professionalism of the PCC, and promote the benefits of council membership.

***Joint Duties of Postal and Industry Co-chairs***

- Direct the council to act progressively and meaningfully.
- Ensure that the council does not become dormant because of poor leadership or members' inactivity.
- Maintain the PCC mailing list.
- Record all new members, notifying current members and executive board.
- Jointly preside at all PCC meetings and executive board sessions.
- Oversee use of PCC funds as approved by the executive board.
- Oversee the keeping of accurate records of funds and preparation of reports.
- Ensure a checking or savings account for council use is established.
- Report on audit of the books annually to members.
- Keep the council active by communicating with members through scheduled meetings and other resources such as newsletters.
- Approve bills and authorize disbursements by treasurer from the PCC account.
- Ensure PCC account is monitored regularly.
- Prepare and distribute a roster of the executive board.

***Duties Unique to Postal Co-chair***

- Ensure that available Postal Service resources are used to maximum capability.
- Keep the lines of communication open between local Post Offices and customers.
- Ensure that the council receives full cooperation from all Postal Service employees, within the bounds of Postal Service policy.
- Appoint the first industry co-chair, or conduct the election in which the first co-chair and other officers are elected.

***Duties Unique to Industry Co-chair***

- Prepare the agenda with input from the postal co-chair for each executive board meeting and distribute it to the members of the board before each meeting.
- Work to keep the lines of communication open between Postal Service management and members of the business mailing community.
- Provide liaison with the postal co-chair or the designated representative and works closely with the postal co-chair.

***Duties Unique to Vice-Chair***

- Preside in the absence of both co-chairs.
- See that the newsletter is published according to the schedule established by the executive board.
- Help promote and organize PCC events.
- Preside over the advisory council and ensure its proper functioning.

***Duties Unique to Secretary***

- Record the minutes of all executive board meetings and general meetings and distribute the minutes to the board within two weeks after each meeting.
- Maintain copies of all PCC documents issued by officers, directors, and committees.
- Distribute copies of the bylaws and any amendments to all members.
- Maintain a supply of council stationery.

***Duties Unique to Treasurer***

- Keep accurate records of funds and preparation of reports to the executive board and general membership.
- Maintain a checking or savings account for council use.
- Oversee audit committee activities. Ensure Postal Service representation at audit.
- Monitor receipts and expenses from the PCC account.
- Monitor/audit PCC accounts quarterly.

## Suggested Committees

### Suggested Committees and Their Duties

Committees give members the chance to become involved in meeting the members' needs so that the PCC can succeed. Each committee should have a clearly defined function.

The committee chairs (which can be called the Advisory Council) are voted in by the general membership or selected by the officers. Once the method is determined, you might want to include this in your bylaws. To chair committees, select people who display effort, energy, and enthusiasm and can devote the time. We recommend that no more than two members per industry and one person per company serve on the executive board and committees. Committee chairs are allowed to serve on the executive board. Postal Service representation is recommended on every committee.

#### ***Audit Committee***

- Audit financial records when necessary.
- Review financial accounts at least once annually.

#### ***Bylaws Committee***

- Review bylaws and ensure that they respond to the needs of the mailing community and PCC objectives.
- Distribute bylaws to newly elected officers.
- Address parliamentary procedures so that new members understand how the board operates.

#### ***Communications Committee***

- Prepare the newsletter for the general membership. (All newsletters should be signed by the postal co-chair.)
- Notify members of changes in Postal Service regulations.
- Advise PCC members of National Postal Forum information.
- Do not accept paid or unpaid advertising for PCC materials. Acknowledgments for services provided are permissible and may cite the contributing company, as long as it does not indicate endorsement by the PCC or the Postal service of one company over another.

#### ***Education Committee***

- Organize classes on mail preparation, mail center management, mail classification, automation standards, and special topics. Procure Postal Service instructors to conduct classes.
- Advise PCC members of innovations in Postal Service operations and the effectiveness of new mailing equipment. (May arrange for exhibitors to display new equipment.)

#### ***Membership Committee***

- Seek potential new members.
- Notify executive board of new members.
- Personally welcome new members.
- Promote networking among members.

#### ***Nominating Committee***

- Solicit nomination of council members for office.
- Screen executive board applications and make recommendations to executive board.
- Prepare necessary balloting material. and establish election procedures.

#### ***Program Committee***

- Organize general meeting program (e.g., selection of agenda, speakers, meeting place, menus, registration activities, etc.)

## Criteria for Designation as a PCC

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A Postal Customer Council is an organization established by the Postal Service and local mailers that abides by the policies in this publication.

After a Postal Service review by the area and/or district office, a PCC that does not abide by the policies in this publication can be reorganized.

## Organizational Objectives

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The objectives of PCCs are to provide the following:

- A forum for business customers and local Postal Service managers to resolve Postal Service issues of mutual concern.
- A chance for mailers to meet and discuss areas of common interest.
- Education for industry members in using Postal Service products, programs, and services to their best advantage.

### Membership

A member is a non-Postal Service person who attends at least two meetings a year. Membership is open to all business mailers — including commercial mailers, organizations, service bureaus, and individuals — who use the services of the Postal Service within the sponsoring Postal Service manager's geographic area. A mailer may be a member of more than one PCC, but it is recommended that he/she not be an officer or executive board member of multiple PCCs.

**Note:** Direct Postal Service competitors who do not use or sell USPS products or mail services may be members, but they are not allowed to sell their products or services at PCC functions; give presentations; exhibit at PCC functions; or be on executive boards.

### Dues/Contributions/Donations

PCCs may solicit reasonable voluntary annual dues from the members. Annual dues should be determined by the local PCC executive board or general membership, and should include an allowance for either a "per person" or a "company" rate, or both. They should be set as to be fair, reasonable, and equitable for PCC members. These dues can help define the membership list. Per-activity contributions may also be solicited, and they should be based on expenses projected in a PCC's annual budget and must be paid by all attendees to the event.

These dues and contributions are used to cover the cost of activities and education for the members as a whole (such as training seminars, a newsletter, and meetings). No one should be excluded from participating in the PCC because of the inability to make donations or contributions or dues payment. Postal Service employees are exempt from paying dues.

PCCs are not intended to operate as profit-making organizations. Each PCC is to function on a break-even basis. PCC funds may be used only for activities directly related to the PCC objectives described above.

These funds may be managed in one of two ways:

- By the postal co-chair in a postal trust account.
- By the treasurer in a separate PCC bank account.

In the case of a bank account, the funds must be protected carefully. The PCC treasurer must:

- Maintain the account (whether checking or savings) for council use only, in accordance with the funds disbursement process set up in the PCC's bylaws.
- Keep accurate records and report on them as the executive board directs.
- Have the books audited annually according to council bylaws.

**Note:** For each authorized PCC event, be sure that a tax-exempt statement is presented to the vendor/supplier and is co-signed by both the industry and postal co-chairs. (The Postal Service's tax identification number may be used for a PCC activity when it is sponsored by the Postal Service and the costs for the event are paid for through an official Postal Service account.)

### **Suggested Budget Development**

If PCC executive boards develop and approve an annual budget that projects its expenses for the fiscal year, budget line items might include:

- Meetings (breakfast, lunch, dinner)
- Tours
- Seminars
- Recognition awards
- Office and promotional supplies or materials
- Postage
- Newsletter publications
- Nominal speaker gifts

The industry and postal co-chairs, along with the executive board, are responsible for budget controls. The treasurer monitors receipts and expenses and reports to the executive board and general membership.

How much money should be maintained in a PCC bank account? There is no set amount, but it should be reasonable for the operation of the PCC. In some PCCs, that may mean \$2,000. In others, it may mean \$10,000, or more. The amount should be sufficient to cover room rentals, speaker fees, food arrangements, awards, transportation, etc.; and to fund upcoming seminars, expos, meetings, and conferences. Since prices vary by locale, and since attendance varies by PCC, it is difficult to quote a hard and fast amount. Just keep in mind that a PCC is operated as a non-profit

organization and the amount maintained in the bank account should be “minimal, reasonable, and justifiable.”

## Reports

An audit committee should formally review the finances every year. The committee should submit periodic financial reports to the executive board so that the board can review expenditures. Postal Service representation is highly recommended on this committee.

The committee must submit a yearly request for funding to cover activities related to its responsibilities. The requests that are approved by the executive board become part of the operating budget.

## Authorizations and Controls on PCC Finances

Sound business practices should be used to control PCC funds. At a minimum, the following practices should be observed:

- Have all expenditures approved by the board.
- Ensure that the PCC bank account is protected. Initiate a dual signature mechanism and/or bond the treasurer.
- Note all board-approved expenses in the minutes of each meeting.
- Break down the expenses for the past 12 to 18 months and keep the records current.
- Retain financial records for 3 years.
- Make sure that PCC activities are consistent with the mission statement and purpose recorded in the bylaws.

## Raising Funds for PCC Activities

PCCs may sponsor activities to offset costs for educational activities (such as mailing clinics for local mailers) or for communication purposes (such as newsletter production). Special event-related fund-raisers (like group outings and team sporting events and tournaments) connected to networking events and activities are also acceptable, if approved by the postal co-chair and attended by Postal Service representatives.

However, PCCs should be careful about the frequency, quality, accountability, and safety of these activities. The purposes for all fund-raising activities must be directly in line with the PCC Program’s mission statement.

A donation to a PCC is not tax-deductible as a charitable contribution. PCCs are not nonprofit entities under the tax laws. PCCs operate on a nonprofit basis because they are a Postal Service organization. However, such a donation may qualify as business expenses that are properly deducted from a business’s gross revenues before it pays taxes on its net profits. Have the company check with its tax advisor.

Unacceptable reasons to sponsor fund-raising activities include:

- Creating scholarship funds.

- Building up extra funds in the PCC treasury.
- Offsetting the cost of special events not connected to networking events and activities.
- Underwriting stand-alone events like auctions, “garage sale” events, car washes for charity, and ongoing programs like candy sales.

## Financial Activities — Gifts

The PCC does not make any payment to any Postal Service employee and may not pay the expenses of any Postal Service employee in connection with any event, including a National Postal Forum. No gift other than a token of appreciation valued at less than \$20 may be given to a Postal Service employee. *No cash gifts are allowed.*

All Postal Service and industry committee and subcommittee members must avoid accepting gifts or meals from businesses that want to maintain or secure PCC products or services. The PCC may accept donations of goods and services, but only if the donations are for the benefit of the PCC as a whole and are completely voluntary, and if the donor receives no special favors in return.

## Credit Card Acceptance

For PCC money that is kept in a Postal Service account. Responding to customer requests for credit card acceptance at Post Offices, the October 4, 2001 *Postal Bulletin* (page 26) authorizes the acceptance of customers’ PCC payments at retail window lobbies. This customer-oriented move by HQs Finance Department allows PCC members and prospective members to pay for membership fees, registration fees, meeting fees, and the like. However, this convenience applies ONLY to those PCCs that keep their money in postal accounts.

For PCC money kept in a private bank account. Additional funding will be required. The PCC would probably be best advised to shop around and negotiate with several banks to see which one is willing to give the best deal. There is a monthly service fee, plus there is a percentage fee for each transaction (amounts to appx. 2.5 percent). This fee varies by card provider. The PCC will likely have to sign a contract with varying stipulations as to length of service, penalty fees, regular fees, and any other restrictions. The PCC has to purchase the credit card machine, and this could run between \$300 and \$500 depending on whether it is used or new. Banks often charge a fee of \$195 when canceling the credit card service, but then the PCC could probably recoup that by selling back the credit card machine to someone else. Please consider the return on investment of this move. It could be very beneficial to the PCC, or it could be very costly. Investigate before you invest.

**Note:** It is recommended that USPS knows who in the PCC is entering into the credit card processing contract. Records should be kept locally so it can be tracked if need be. Copies of the contract need to be kept on file for auditing purposes. The postal co-chair, industry co-chair, and executive board members should review and approve the contract.

There should be guidelines for card acceptance and verification, otherwise the PCC could be liable for improperly accepting a credit card transaction. These guidelines can be written by or with the assistance of the credit card issuing institution.

## Officers

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The sponsoring postmaster or Postal Service manager (the postal co-chair) and a postal customer (the industry co-chair) head the organization.

The two co-chairs are supported by other officers selected by the members of the organization or previous officers, and normally consist of a minimum of three, including a vice-chair, secretary, and treasurer. Officers should be enthusiastic and dedicated to the PCC's objectives. To engender customer participation, diversity of opinion, and innovative programs and practices, it is recommended that officers serve no more than two years in each elected position, with four consecutive years as a maximum.

### PCC Mailing List

The PCC mailing list (membership list) is subject to *Administrative Support Manual (ASM)* 352.45, "Information Not Available for Public Disclosure," part of which states:

**352.451 Mailing Lists.** Except under 352.416, the Postal Service and its officers and employees must not make available to the public by any means or for any purpose any mailing list or other list of names or addresses (past or present) of Postal Service customers or other persons.

The list may be used only for PCC business-like newsletters and meeting notices. The PCC mailing list is a Postal Service list and, by law, cannot be disclosed to the public. A PCC member's name and address may be provided if that individual signs a release allowing such use of his/her name. (See Exhibit 12) Additionally, a non-disclosure agreement should be signed by any PCC member who maintains the list or by any outside source that uses it. (See Exhibit 13)

However, these requirements don't mean that a PCC can't create and maintain its own non-Postal Service mailing list. Such a list can be made up of any PCC members. Persons must agree in writing to be on the list, and it must be disclosed to them that the list is not protected from disclosure. New PCCs may buy or rent mailing lists to find new members.

### PCC Newsletters or Bulletins

Periodic newsletters or bulletins are published by PCCs to tell members about activities involving the PCC and the Postal Service. Such publications must carry the Postal Service and/or PCC logo, the PCC name and mailing address, the official G-10 permit indicia, and the signatures — or names and titles — of the postal co-chair and industry co-chair. The postal co-chair/designee must approve each publication.

**PCC Member Mailing Address Disclosure Statement**

**PCC Member Mailing Address Disclosure Statement**

*(To be kept on file by local PCC executive board)*

While serving in an official capacity as a member of the \_\_\_\_\_ (PCC Name) PCC, I, \_\_\_\_\_, permit the following information to be publicized and/or distributed, for the specified purposes listed below. I release the U.S. Postal Service of its legal obligation, and waive any proprietary restrictions to giving out such information, in accordance with the guidelines set forth in Publication 286, *Postal Customer Council Program*, and Section 352.451 of the Postal Service's *Administrative Support Manual (ASM)*, which states, "Except under 352.416, the Postal Service and its officers and employees must not make available to the public by any means or for any purpose any mailing list or other list of names or addresses (past or present) of postal customers or other persons."

Information to be released: (Fill-in as many items as apply)

Name \_\_\_\_\_

Title \_\_\_\_\_

Company Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone number \_\_\_\_\_

Fax number \_\_\_\_\_

Email address \_\_\_\_\_

Information may be released to the following requestors: (check as many as apply)

Local vendor prospect mailing lists \_\_\_\_\_

Local PCC web site \_\_\_\_\_

Local postal mailing list \_\_\_\_\_

National Postal Forum mailing list \_\_\_\_\_

National vendor prospect mailing lists \_\_\_\_\_

National PCC web site \_\_\_\_\_

National postal mailing list \_\_\_\_\_

Other \_\_\_\_\_

This statement is signed by me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.  
(month) (year)

Signed: \_\_\_\_\_

Acknowledged by:

\_\_\_\_\_  
(Postal Co-Chair/Designee) (Date)

Exhibit 13  
**PCC Member Non-Disclosure Statement**

**PCC Member Non-Disclosure Statement for PCC Mailing List(s)**

I, \_\_\_\_\_, agree to use the Postal Customer Council mailing list only as directed by the PCC executive board and postal co-chair for the specific purpose entrusted to me, in accordance with the guidelines set forth in Publication 286, *Postal Customer Council Program*, and Section 352.451 of the Postal Service's *Administrative Support Manual (ASM)*, which states, "Except under 352.416, the Postal Service and its officers and employees must not make available to the public by any means or for any purpose any mailing list or other list of names or addresses (past or present) of postal customers or other persons."

This agreement is signed by me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.  
(month) (year)

Signed: \_\_\_\_\_

Acknowledged by:

\_\_\_\_\_  
(PCC Postal Co-Chair) (Date)

## Violation of Postal Service Policies

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Any PCC member repeatedly violating the policies in this publication will be prohibited from participating in PCC activities.

## Policy on PCC Meetings

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Meetings and related activities are scheduled and conducted by member mailers, with support and approval from local Postal Service officials. For the PCC to be considered active, it must hold at least two general meetings a year.

To promote attendance at meetings, PCCs should try to provide a variety of interesting presentations, but meetings have a business purpose and should stay within accepted business formats. Where Postal Service facilities are adequate, PCCs may meet on Postal Service property.

The Rehabilitation Act of 1973, the Americans With Disabilities Act of 1992, and Postal Service regulations require the Postal Service to help people with disabilities take part in activities like PCC meetings. For example, if a hearing-impaired person asks for assistance, the Postal Service should provide every reasonable aid, including a certified interpreter if necessary.

## Policy on Speakers, Exhibitors, and Competitors

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### Speakers

One of the PCC Program's objectives is to educate the business mailing community. Speakers on local Postal Service issues should be local Postal Service managers because they can be more responsive to local customers.

It can be appropriate to use higher level Postal Service officials, particularly when the audience is large and includes mailers with nationwide operations. (To request such speakers, use the guidelines discussed in Chapter 3.)

But outside speakers can sometimes be the best choice, providing a vital and little-known link to the Postal Service. For example, a talk by address-matching technicians might make the automation process clearer to customers, boosting participation. In any case, subject matter should always be in good taste and in line with the mission, goals, and objectives of the PCC Program. Any speaker fees are the responsibility of the PCC.

### Exhibitors

All vendor or exhibit displays at PCC functions must be products or services that help improve Postal Service or mailing industry services by promoting cooperation between mailers and the Postal Service. The products and services must fully comply with the applicable Postal Service regulations.

Vendors (companies that sell mail-related products and services and use the Postal Service) must not use PCC functions to offer the public any alternative delivery service, unless it simply conveys mailable matter to or from postage-paid handling by the Postal Service. And an exhibitor must not be employed by or control a firm that promotes, offers, or sells products or services that directly compete with Postal Service's products or services.

## Competitors

PCCs aren't designed to promote products and services that compete with — or even complement — Postal Service offerings. Even though competitors, or their subsidiaries, may be members of a PCC (since virtually all use the mail), they are not allowed to sell their products and services at PCC functions, give presentations, exhibit at PCC functions, or be on executive boards. (See Exhibit 15)

**Note:** Competitors are always free to create their own non-postal supported "councils" to meet with their customers.

Activities at PCC meetings are restricted to PCC business, even though membership is open to all Postal Service customers within the sponsoring manager's geographic area. Attendees may not use the PCC for personal gain or to promote their products, services, or business in any way. See Exhibit 14.

Exhibit 14  
**PCC Member Non-Competition Agreement**

### **PCC Member Non-Competition Agreement**

I, \_\_\_\_\_, as a general and/or executive board member of the \_\_\_\_\_ (PCC Name), agree that I will not sell, recommend, favorably discuss, or exhibit any company's products or services that compete with the products and services of the U.S. Postal Service while acting in my official PCC role. I acknowledge that the business and purpose of the Postal Customer Council is to discuss and further the interests of the Postal Service and its customers and to enhance the relationship between those customers and the Postal Service.

I also acknowledge that in accordance with PCC Publication 286, Chapters 1 and 4, should I be in violation of this agreement, I will be ineligible to remain as a member of the PCC and/or the executive board and must immediately resign.

I further agree that if in my business dealings I or my company offers the products and services of both the Postal Service and one or more of its competitors during PCC functions, or in any situation where I serve as a representative of the PCC, I may only promote, discuss, or offer an exhibit for that part of my business that deals with the Postal Service. I also agree that, should my business arrangement with the Postal Service be terminated, leaving me only dealing with competitors of the Postal Service, I will immediately resign from the PCC and/or the executive board.

This agreement is signed by me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.  
(month) (year)

Signed: \_\_\_\_\_

Acknowledged by:

\_\_\_\_\_  
(PCC Postal Co-Chair) (Date)

## Policy on Public Issues

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PCCs may not take part as an organization in any form of political activity or lobbying. Questions about these restrictions should be referred to your local Postal Service field legal office or the appropriate ethical conduct officer. This policy doesn't prohibit anyone from exercising individual rights through the political process or expressing personal views on Postal Service subjects.

## Policy on Newsletters, Bulletins, and Mailing Lists

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Paid or unpaid advertisements are not allowed at this time. It is not permitted to advertise or promote individual companies/vendors. Advertising is defined as the use of the corporate logo, a sales slogan, or sales verbiage. Sponsorship of, or an acknowledgment for, support or services provided to the PCC is permitted, but it must be short and simple, listing only the name of the company. A "call to action" for PCC members, or their business associates or friends, to solicit business agreements is not permitted, whether in the local PCC area, the state, or across the nation.

The mailing list for the newsletter, bulletin, or PCC in general, is proprietary. (See Exhibit 13) It is not to be used for any non-Postal Service or non-PCC use. This proscription includes members' email addresses and phone numbers as well.

The PCC may maintain a separate, non-proprietary mailing, email, or phone list for those who wish to be on it. Such a list could then be given/sold/rented to anyone the PCC wishes to do business with.

## Policy on Payment of Postage

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The postmaster's office is encouraged to send out official PCC business-related mail using a G-10 permit imprint, but the mail must be printed on USPS stationery or paper bearing the PCC's name and return address. The mail must also be approved in writing and signed by the postal co-chair or designee. The PCC secretary should keep on file the signed draft, memo, or letter approving the mailing.

The postmaster's official duties and job description allow him or her to use a Postal Service permit (G-10) to mail PCC newsletters and to announce business meetings and/or seminars and their location, time, date, and any costs.

## Policy on Nonprofit Status

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Because PCCs are organized by and are part of the activities of the U.S. Postal Service, the activities described in this publication don't create a need for PCCs to seek nonprofit status under Internal Revenue Service (IRS)

regulations. No PCC should seek nonprofit status. *If a PCC has such status, it should contact the national PCC office for assistance.*

The Postal Service tax-exempt identification number may be used on bank accounts and contracts. Please find out from your postmaster or postal co-chair which tax-exempt number you should use.

The Postal Service's exemption from the payment of state taxes, including sales taxes, is based on its status as an establishment of the federal government. When PCC activities are official Postal Service functions paid for through Postal Service accounts, it is appropriate for the Postal Service to claim its preemption from state taxes and use its federal tax identification number in connection with the disbursement of those funds. Thus, the Postal Service's tax identification number may be used for a PCC activity if it is sponsored by the Postal Service and if the costs for the event are paid for through an official Postal Service account.

If the PCC chooses to maintain its own funds in a non-postal account, the PCC is not to assert the Postal Service's tax exemption in conjunction with the payment for PCC activities with those funds. Use of the Postal Service's tax identification number is not appropriate in those circumstances.

## Policy on Rebates

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A PCC is not allowed to receive rebates on purchases. Rebates can create a conflict of interest for the Postal Service.

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