



**FINANCIAL POLICY  
OF  
UNITED PHARMACISTS OF SOUTHERN CALIFORNIA**

**Conferences, Training and Meetings**

1. **Advanced Labor and Management Class (UNAC):** UPSC shall pay for registration fees for up to nine (9) UPSC members (including new officers) to attend the 2-day Advanced Labor and Management Class per calendar year. UPSC shall reimburse for lost wages (or up to 8 hours for work on a day off) not to exceed actual hours attended in class (see General Rules for reimbursement rate). Attendee use of an education leave or vacation day for the second day of training is encouraged.
2. **Annual Affiliate Officers Conference (AAOC):** UPSC shall reimburse for one (1) day of lost wages (or up to 8 hours for work on a day off) (see General Rules for reimbursement rate) for the officers who attend the Annual Affiliate Officers Conference (AAOC). If the conference is two (2) days, UNAC/UHCP shall pay for the second day. Attendee use of an education leave or vacation day for the second day of training is encouraged. Hotel rooms and tax (double occupancy) for one (1) night shall be paid for the Officers by the Affiliate. Mileage and parking shall be reimbursed for the driver (see General Rules for reimbursement guidelines). Carpooling is encouraged. Other expenses shall require the approval of the President or Treasurer and one other UPSC Officer. When the expenses involve the President or Treasurer, two (2) other UPSC Officers must approve.
3. **General Membership Meetings:** UPSC may spend up to \$15 per member registered to attend a General Membership Meeting to provide food and non-alcoholic beverages, for up to 2 meetings per calendar year. Other expenses shall require the approval of the President or Treasurer and one other UPSC Officer. When the expenses involve the President or Treasurer, two (2) other UPSC Officers must approve.
4. **Steward Discovery Meetings or Conference Calls:** UPSC shall reimburse up to 1 hour per month for lost wages (or for actual hours worked on a day off) (see General Rules for reimbursement rate) for attending steward discovery meetings or conference calls.

5. **UNAC/UHCP Convention:** UPSC shall reimburse up to one (1) day of lost wages (or up to 8 hours for work on a day off) (see General Rules for reimbursement rate) for convention delegates (including officers) to attend the UNAC/UHCP convention.

UPSC shall reimburse convention delegates round trip travel expenses for attending the UNAC/UHCP convention. Mileage and parking shall be reimbursed for the driver (see General Rules for reimbursement guidelines). Carpooling is encouraged.

UPSC shall pay convention delegate fees and shall reimburse delegates for hotel rooms and tax (double occupancy) up to three (3) nights. Other expenses must be authorized by the President or Treasurer and one other UPSC Officer. When the expenses involve the President or Treasurer, two (2) other UPSC Officers must approve.

6. **UNAC/UHCP Convention Raffle Prize:** UPSC may contribute up to Five Hundred Dollars (\$500.00) for UNAC convention raffle prizes for each UNAC/UHCP convention from 2018 and thereafter.
7. **UNAC/UHCP Scholarship Program:** UPSC may contribute up to Two Thousand Five Hundred Dollars (\$2500.00) annually to the UNAC/UHCP scholarship program starting with the 2017 calendar year.

## **Officers**

1. **Grievances:** Officers presenting/preparing for grievances shall be paid for his/her lost wages unless paid for by the employer up to a maximum of two (2) hours per month. Lost wages reimbursement in excess of 2 hours per month must be pre-approved by the President or Treasurer and one other UPSC Officer. When the lost wages request is from the President or Treasurer, two other officers must approve.
2. **Monthly Stipend:** Effective January 1, 2017, UPSC shall pay monthly stipends to UPSC Officers for performance of duties as follows:

UPSC President - \$350  
UPSC Treasurer - \$300  
UPSC Secretary - \$300  
All other UPSC Officers - \$200

The stipend shall take effect immediately upon any new Officer taking office. Stipends may overlap over up to a 2-month period between the outgoing officer and the incoming officer.

3. **Rounds to Facilities in Southern California:** UPSC shall reimburse for lost wages (or actual hours worked on a day off) (see General Rules for reimbursement rate) up to thirty-two (32) hours per month for the President or his/her designee to perform rounds to the Affiliate's

regional facilities. Mileage shall be reimbursed (see General Rules for reimbursement guidelines).

4. **Union-Related Meeting Attendance:** UPSC shall reimburse for lost wages (or up to 8 hours worked on a day off) (see General Rules for reimbursement rate) for any Officer who is required to attend a training or meeting related to the business of UPSC or UNAC/UHCP, subject to pre-approval by the President or Treasurer plus one other UPSC Officer. If the President and/or Treasurer are the proposed attendee(s), two (2) other UPSC Officers must approve. UPSC shall also reimburse for reasonable travel-related expenses including hotel and taxes, airfare, meals, ground transportation, parking and mileage (see General Rules for reimbursement guidelines).
5. UPSC shall reimburse UPSC officers for lost wages (or up to 8 hours for work on a day off (See General Rules for reimbursement rate) while performing any UPSC related AOC approved projects. Hours exceeding 8 hours may be approved by the AOC.

## **Union Business**

1. **Investment of Available Funds:** When funds are available, the Finance Committee may instruct the Treasurer to deposit a portion of the funds in a certificate of deposit(s) at an FDIC insured institution or into other designated funds as directed by the Finance Committee.
2. **Bargaining Committee:** During future negotiations, UPSC shall reimburse bargaining committee members (as defined in the UPSC Constitution) for lost wages (or up to 8 hours for work on a day off) (see General Rules for reimbursement rate). UPSC shall also reimburse bargaining committee members for actual lost wages for special negotiation-related meetings. UPSC will provide meals for bargaining committee members while bargaining. UPSC shall reimburse for mileage, parking, and meals not provided by UPSC (see General Rules for reimbursement guidelines). UPSC shall reimburse for necessary hotel overnight stays and taxes (double occupancy when feasible), subject to pre-approval by the President or Treasurer and one other UPSC Officer. If the overnight stay involves the President and/or Treasurer, two (2) other UPSC Officers must approve.
3. **Discretionary Expenditures:** The amount of paid receipts shall be reimbursed for approved items for union use according to Federal Law, including, but not limited to, postage, miscellaneous office supplies, software or web service subscriptions, professional subscriptions, storage, food and non-alcoholic beverages for membership and Officer meetings, business cards, union apparel, phones, phone service including data/messaging, filing cabinets, calculators, printers/scanners, computers, data storage devices, electronic tablets, notebooks, and donations/gifts/scholarships.

4. **Mailings.** The UNAC/UHCP State Office shall pay for UPSC mailings and UPSC shall reimburse the State Office for the mailings. If UPSC submits a newsletter after the deadline, UPSC shall not be eligible for the bulk rate and shall pay the full rate of the mailing.
5. **Member Reimbursement For Union Business:** UPSC shall reimburse UPSC members for lost wages (or up to 8 hours for work on a day off) (see General Rules for reimbursement rate) while performing any UPSC-related business. UPSC shall reimburse a member for expenses incurred while performing union-related business, including, but not limited to, hardware, software or web services required to perform duties requested by UPSC and reasonable travel-related expenses including hotel and taxes, airfare, meals, ground transportation, parking and mileage (see General Rules for reimbursement guidelines). All above reimbursements up to and including five-hundred dollars (\$500) are subject to pre-approval of the President or Treasurer and one (1) other UPSC Officer. Reimbursements above five-hundred dollars (\$500) are subject to pre-approval by the AOC.
6. **Labor Council:** UPSC shall pay membership fees to the Central Labor Council.
7. **Bond Insurance:** UNAC/UHCP shall provide Bond Insurance for UPSC's protection. UNAC/UHCP shall pay for the insurance and UPSC shall reimburse UNAC/UHCP.

### **Submission of Expense & Compensation Requests**

1. All expense reimbursement requests must be submitted to the UPSC Treasurer within sixty (60) days of the date of the receipt to be reimbursed. Any items submitted after the sixty (60) days must be approved by the President or Treasurer and one (1) other UPSC Officer. If the late reimbursement request is submitted by the President and/or Treasurer, two (2) other UPSC Officers must approve.
2. All compensation requests MUST be submitted to the UNAC/UHCP State Office for proper payroll deductions. UNAC/UHCP, in turn, shall bill the Affiliate and the Affiliate shall reimburse UNAC/UHCP. This item cannot be changed as it is a mandate from the UNAC/UHCP Executive Council.
3. All Compensation requests MUST be submitted to the UNAC/UHCP State Office within sixty (60) days of when the event took place. Any forms submitted after sixty (60) days shall require the approval of the President or Treasurer and one (1) other UPSC Officer. If the late reimbursement request is submitted by the President and/or Treasurer, two (2) other UPSC Officers must approve.
4. Expense reimbursements must comply with the following:
  - A. All original receipts must be submitted with the expense form to the UPSC Treasurer.
  - B. For overnight hotel stay(s) or airfare, expense reimbursement requests along with a copy

of the hotel or flight receipt for payment shall be submitted to the UPSC Treasurer.

- C. If food/refreshments are supplied for any meeting, the sign-in sheet must be attached along with the itemized receipt for reimbursement. If any food is left over it must be stated where it was distributed.
- D. All expenses must be approved by an officer other than the one submitting the form. Electronic approval is acceptable.

## **General Rules**

1. **Mileage.** Mileage reimbursement shall be submitted to the UPSC Treasurer and is not taxable. Where permitted, mileage reimbursement shall be for round trip mileage in excess of a normal workday commute or for total round trip mileage on a normal day off. Mileage reimbursement shall be calculated using the prevailing IRS allowance. Carpooling should always be encouraged.
2. **Parking.** Parking reimbursement shall be limited to a maximum of \$35/day. A receipt must be submitted for reimbursement.
3. **Lost Wage Reimbursement.** Lost wage reimbursement is taxable and shall be submitted to UNAC/UHCP for reimbursement by UPSC and shall be on a keep-whole basis, at the actual hourly rate, including shift differential if regularly scheduled for an evening or graveyard shift. Lost wages shall be paid for actual time worked only. Up to 8 hours may be reimbursed for work on a day off. Time worked beyond 8 hours on a scheduled day off shall be on a volunteer basis only and will not be eligible for wage reimbursement. A current paystub must be submitted for any lost wage reimbursement requests submitted, in accordance with the UNAC/UHCP State Guidelines.
4. **Airfare.** Airfare reimbursement shall be submitted to UPSC and is not taxable and where permitted shall be reimbursed at the coach airfare rate. Airfare above the coach airfare rate shall be the responsibility of the member submitting for reimbursement.
5. **Meals.** Approved meal reimbursement shall be submitted according to the guidelines below, and shall be reimbursed with a daily limit set by prevailing IRS standards.
  - a. Individual Meal: Reimbursement for an individual meal requires approval by the President or Treasurer and one (1) other UPSC Officer and must be submitted to the UNAC/UHCP State Office for proper payroll taxes to be deducted. Alcoholic beverages shall not be reimbursed. An individual meal must be associated with an overnight stay in order to be considered for reimbursement.
  - b. Group Meal: For meal reimbursement for 2 or more Officers or an Officer and member(s), an itemized receipt must be submitted to the UPSC Treasurer by one person and must include the names of those present. The itemized receipt must be signed by all

parties in attendance, or a sign-in sheet must be attached to the itemized receipt. Alcoholic beverages shall not be reimbursed.

Meals Subject to Payroll Taxes (submitted to UNAC/UHCP State Office):

- Meals if eating alone
- Meals (non-group) with no overnight stay

Meals Not Subject to Payroll Taxes (submitted to UPSC Treasurer):

- Group meals
- Meals (non-group) with an overnight stay

## **Kaiser vs. Union Reimbursement**

Here are some reminders when having meetings with Kaiser:

Meetings with managers that they request or we request and management agrees are coded on your Kaiser timecard as union business and are paid by Kaiser, not by UPSC or UNAC/UHCP. You can check with your timekeepers for the correct code. Generally, UNP is paid by Kaiser and UNH is not paid by Kaiser and submitted for reimbursement to UPSC.

### **Rule of Thumb:**

Kaiser pays door to door when we have meetings to work out issues at Kaiser, including grievance hearings.

Kaiser calls the meeting for the union to attend. → Kaiser pays.

We ask for a meeting to work out something and management agrees. → Kaiser pays.

Area Rep/Staff Rep and note taker attend a grievance hearing → Kaiser pays.  
(more than 2 people may be problematic)

Kaiser is investigating a member and we represent the member. → Kaiser pays for both.

We are preparing for a grievance hearing. → Union pays.

We have a meeting with a member to talk something over. → Union pays.

We ask members to come to a Union meeting to work on an issue. → Union pays.

## **Addendum**

1. **Modified Dues Deduction.** In recognition of the Affiliate's startup status, the collection of dues for full time and part time members will be graduated yearly, beginning 2016 until the full dues rate in 2020, based upon the following formula:

2016: 0.25% per pay period

2017: 0.50% per pay period

2018: 0.75% per pay period

2019: 1.00% per pay period

2020: 1.25% per pay period

Dues collection for per diem members will be on a pro rata basis until hours worked in a pay period equals 0.5FTE status wherein regular dues rates apply.

2. Expenses covered by this Financial Policy, until full dues deduction in 2020, shall be decided by the Affiliate Officer Cabinet on a case by case basis.