

Endorsed by the Budget Advisory & Financial Compliance Committee: 1/23/19

Purchase and Distribution of Giveaways to PEF Members by PEF Elected Officials

In the event that a PEF Division or Region decides to purchase giveaway items, the specific union purpose for the expenditure must be provided, in writing, along with written documentation of the approval from the Division Council, Regional Coordinator or other person(s) authorizing the expenditure.

Purpose: Giveaways may be used to encourage membership engagement, mobilization, and members' participation in PEF. For example, such items may be raffle items at Divisional and/or Regional and/or Statewide membership meetings, door prizes at picnics and holiday parties, union trivia contest prizes, or won at other PEF special events.

Guidance: It is strongly encouraged that any customized giveaways (t-shirts, lanyards, water bottles, hats, etc.) include official PEF logo, colors, themes, and branding. Every effort should be made to purchase union-made and USA-made products, consistent with PEF policy. Bulk purchases of items, in coordination with HQ and for multiple Regions and Divisions should be prioritized, in order to obtain favorable discounted pricing. PEF Communications staff may provide guidance on design and suppliers.

Other types of giveaway items should be purchased from the PEF Membership Benefits Program whenever possible in order to benefit from pricing discounts, for example: gift cards and movie tickets.

Required Documentation: Whenever giveaways are distributed, whether as raffle prizes, door prizes, or otherwise, it is imperative that a proper accounting for such items be provided.

- Giveaways must be accounted for in the given Division's or Region's budget, with sufficient funds available for the expenditure.
- Specification of the union purpose/event, and the date and time where such items will be raffled off or otherwise won, must be provided.
- An itemized receipt for the purchased items and a description of members receiving the items must be provided to PEF Finance (for example, 50 pens distributed at a members' meeting).
- For items valued at \$20 or more each, the name of the recipient(s) must also be provided to PEF Finance to substantiate the purchase and distribution of the items.

- Any excess inventory of gift cards must be sent to PEF Finance for secure storage on behalf of the Division.

Prohibition: To avoid the misuse of giveaways in electioneering, giveaway items purchased with PEF funds cannot be given out by a candidate for a PEF elected office while s/he is seeking petition signatures from PEF member(s).

IMPORTANT NOTES:

- *Distribution of cash gift cards (e.g. AmEx, Visa, MasterCard) or cash is expressly prohibited.*
- *Providing gift cards to the entire membership of a Division or Region is essentially a rebate of a member's dues, and as such is prohibited by PEF's policy governing division expenditures, and is also prohibited by the LMRDA.*

Any exceptions to this policy require advance approval from the PEF Secretary-Treasurer.