

Amendment 1 to the **PROPOSED AMENDMENT TO POLICY CHANGE** for Local Office Support

140.50 MTA Local Support Program

PURPOSE

To help associations defray part of the cost of operating local associations.

RULES FOR OPERATION

1. Locals are encouraged to maintain an updated record of these expenses and, when requested, communicate this record to the MTA. Each local association, or each group of local associations, requesting MTA support shall make available to MTA all of the following documents:
 - a. Local Dues & Audit Certificate (MTA Generated)
 - b. Confirmation or Receipt of Filing Previous Year's 990 Tax Form
 - c. Confirmation or Receipt of Most Recent 150E Forms 1 and 2.
 - d. Full unit lists of all staff of the local's employer eligible to enroll in the local association.

~~b.* For expenses submitted in excess of \$100, receipts or other supporting documentation should be maintained by local associations and made available to MTA upon request. In addition to the Audit Certificate that is required to be filed by September 15, all locals requesting support should also submit a quarterly Income Statement (Financial Statement showing Incomes and Expenses) for the quarter just ended.~~
2. Categories of support are limited to the following:
 - ~~OFFICE EXPENSES: rent, telephone, utilities, equipment, office supplies, postage, printing, insurance, paper, clerical services, payroll taxes, disability costs associated with but not limited to CART services and interpreting, technology services, including ZOOM and other electronic services, and audit costs.~~
 - ~~COMPENSATION: local officers, committee chairs and committee members.~~
 - ~~CONFERENCES: registration fees at MTA approved conferences and hotel room costs for MTA Annual Meeting (as advertised by MTA).~~
2. The intention of the Local Support Program is to provide financial support for office expenses, officer compensation, and MTA Conferences that cultivate labor organizing and social justice.
3. The MTA and the local association, or the group of local associations, shall enter into a written agreement covering the categories of support and the association(s) shall annually certify that the financial statements have been audited or reviewed.
4. The local association shall submit requests applications for reimbursement on an annual ~~quarterly~~ basis and shall certify the amount of local dues for the succeeding fiscal year on or before January 1st. ~~September 15.~~
 - b. ~~The due date of the final local office support fiscal year reporting should be postmarked or received by the first business day LOCAL ASSOCIATIONS 120 July 2024 after July 15 of the appropriate year.~~
5. a. Members and potential members ~~or agency fee payers~~ should be reported on a full-time equivalent basis in accordance with the percentage of MTA's active dues paid.

Such reports should be acquired through 150e information requests by December 1. A sample template will be provided by the MTA.

b. Local Support Maximum reimbursements will should be calculated based on full-time equivalents.

6. The amount of reimbursement for local support shall be based on the current year's membership. ~~the higher of either:~~
 - a. ~~The amount of local support received in FY 2024, or~~
 - b. ~~The amount of local support received in FY 2025, or~~
 - c. **The current year's membership** as of January 1st and the previous year's in-person delegate attendance at Annual Meeting. If a local was unable to send a full in-person delegation to the Annual Meeting, a member who attended one of the annual MTA conferences offered by the Division of Training and Professional Learning (TPL) within the previous year may be substituted for the purposes of this policy. The amount will be determined in accordance with the table below.
7. In future appeals, the local association President, the Executive Committee member, and the Board member who represent the local will be notified that an appeal for late-filed Local Office Support has been filed and that their presence at the appeal is requested.

FUNDING

Local associations **submitting documentation by the stated deadline will receive funding on the following schedule based upon member FTE and attendance at Annual Meeting and TPL Conferences.** may be reimbursed for 50% of the expenses incurred up to the maximums set forth in the following reimbursement schedules.

100% OF ACTIVE MTA DUES

LOCAL DUES	REIMBURSEMENT
Less than \$30	\$5.00 per member or agency fee payers
\$30-44.99	\$10.00 per member or agency fee payers
\$45-59.99	\$15.00 per member or agency fee payers
\$60-79.99	\$20.00 per member or agency fee payers
*\$80 or more	\$25.00 per member or agency fee payers (effective 1998-99)

60% OF ACTIVE MTA DUES

LOCAL DUES	REIMBURSEMENT
Less than \$18	\$3.00 per member or agency fee payers
\$18-26.99	\$6.00 per member or agency fee payers
\$27-35.99	\$9.00 per member or agency fee payers
\$36 or more	\$12.00 per member or agency fee payers
\$48 or more	\$15.00 per member or agency fee payers

30% OF ACTIVE MTA DUES

LOCAL DUES	REIMBURSEMENT
Less than \$9	\$2.00 per member or agency fee payers
\$9-13.49	\$3.00 per member or agency fee payers
\$13.50-17.99	\$5.00 per member or agency fee payers

\$18 or more \$7.00 per member or agency fee payers
 \$24 or more \$8.00 per member or agency fee payers

	ACTIVE PROFESSIONALS	ANNUAL MEETING DELEGATE BONUS
FY 2026	\$17 per FTE	\$0 per delegate
FY 2027	\$19 per FTE	\$100 per delegate
FY 2028	\$21 per FTE	\$200 per delegate
FY 2029+	\$23 per FTE	\$300 per delegate
FY 2030+	\$25 per FTE	\$400 per delegate

* The change in the policy which was adopted May, 1997 shall be effective in FY 1998-99; all local associations will be notified of the change in the policy before the effective date.

- Members should be categorized according to the schedule for the percentage of MTA active dues or agency fee paid when Local Association Support worksheets are prepared.
- The amount of funding provided to each local shall be reduced proportionately if less than the total amount of projected program costs, as requested in the proposed budget, is included in the budget adopted by the Annual Meeting of Delegates.
- Local support payments shall be paid to local associations only if dues payments are remitted in accordance with the MTA Bylaws, Article IV, Section 3.