

New York State's Largest Independent Union
Suffolk County Association of Municipal Employees, Inc.

ACTIVE MEMBER UNIT OPERATIONS MANUAL

September 25, 2026
Board of Director's Meeting

ASSOCIATION OF MUNICIPAL EMPLOYEES

UNIT CONSTITUTION & UNIT FINANCIAL CODE

ACTIVE MEMBER UNIT OPERATIONS MANUAL

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ACTIVE MEMBER UNIT OPERATIONS MANUAL

ARTICLE I – NAME

This subsidiary shall be known as the _____Unit of the Suffolk County Association of Municipal Employees, Inc. UD121217

ARTICLE II – PURPOSE AND POLICY

Section 1. Organization. This Unit is organized as a subdivision of the Suffolk County Association of Municipal Employees, Inc. The Association is a labor organization created to represent its members who are civil servants in the State of New York; to perform as a bargaining agent as applicable, and to protect and improve wages, hours and the terms and conditions of employment of its membership. The Association is responsible for enforcing the collective bargaining agreement to which the Unit is a party. In recognizing the fundamental rights of our members, not only as members but as citizens, the Association and its members adopt this Unit Operations Manual. UD22219

Section 2. Requirements. Each and every Unit of the Suffolk County Association of Municipal Employees, Inc. shall be required to fulfill the requirements herewith set forth. UD121616; UD121217

Section 3. Establishment of Minimum Standards. This manual is the establishment of minimum standards to be met by the Unit. Nothing shall prohibit the Unit's Executive Board from creating additional, more stringent guidelines, but in no case may the unit adopt any guidelines which are less demanding than those enumerated herein. This manual shall not be interpreted in any manner to alleviate the responsibilities placed on an elected officer by the Governing documents of the Association. UD92526

Section 4. Amendment Clause. The Board of Directors shall be responsible for adopting, and thereafter amending, the Unit Operations Manual with a majority vote required. The Unit Operations Manual may not be inconsistent with the Governing documents of the Association and must be common to all units. This Unit Operations Manual shall be updated after each convention of the Association. UD22219

ARTICLE III – MEMBERSHIP

Section 1. Members. Any current employee of any Unit who is a member of the Suffolk County Association of Municipal Employees, as defined by the Association Constitution & Bylaws, shall be a member of this Unit. UD112816
(C&B Article IV-Membership, Section 1. Members).

Section 2. Member in Good Standing. A member in good standing shall include any person who has fulfilled the requirements for membership and who has neither voluntarily withdrawn from membership, nor has been expelled or currently suspended from membership, nor has lost the right to run for elected office or appointed position

after appropriate proceedings consistent with provisions of the Constitution & Bylaws of this Association. UD112816
(C&B Article IV—Membership, Section 7. Member in Good Standing)

Section 3. Gratuitous Membership. Gratuitous Membership may be granted by the Executive Board upon receipt of an application by the Association as set forth in the Association's Constitution & Bylaws. Members granted gratuitous membership are considered to be members in good standing. UD22219
(C&B Article XVIII -Dues, Section 4. Gratuitous Membership)

Section 4. Change in Member Status.

a. During the period of July 1- July 14 annually will be known as the change in member status period. General notification will be undertaken by the Association. UD22219
b. Non-Members will not be entitled to any of the rights and privileges of a member in good standing, including but not limited to disciplinary representation. UD22219
c. Any person who exercises the above provision and wants to regain the status of a member in good standing will be responsible to pay the application and administration fees, arrears due, and any assessments that would have been paid while a member in good standing in any Bargaining Unit the Association represents. UD22219
d. Any person that exercises the above provision understands that no representation or services will be provided retroactively, except those required by law. UD22219
e. Any person that exercises the above provision and regains the status of a member in good standing will be precluded from seeking or holding any Association Office for a period of five (5) years. UD22219

(C&B Article IV membership Section 6. Change in Member Status)

Section 5. Non-Member. Persons not considered Association Unit Members shall have none of the rights of the Unit Members. Non-Members will not be provided any benefits, services or representation except as required by law. UD22219
(C&B Article IV membership Section 4. Non-Member)

ARTICLE IV – UNIT OFFICERS

Section 1. Unit Executive Board. The officers of this Unit shall be President, Executive Vice President, one (1) or more Vice Presidents, a Secretary, a Treasurer or Secretary/Treasurer. The Unit President, with the approval of two-thirds (2/3) of the Unit Executive Board, may create other offices as deemed necessary, not to exceed a maximum of ten (10).

Section 2. Structure of Unit Board. Units shall have a minimum of four (4) and a maximum of ten (10) elected officers. These shall consist of a President, Executive Vice President one (1) or more Vice Presidents, Secretary and Treasurer. No one may hold more than one (1) unit office with the exception of the Secretary /Treasurer, which may be combined. A minimum of four (4) officers shall be required at all times; President; Executive Vice President, Secretary and Treasurer. The number of officers composing a Unit Board may be changed at any time up to January 1st of the election year. The Unit

Officers of the Association shall be elected by the Unit Membership for a term of **four (4) years**. UD92526

Section 3. Election of Officers. All Unit elections shall be conducted in accordance with the provisions set forth in the Association's Governing Documents and current Unit Election Manual adopted by the Association Election Committee and approved by the Board of Directors. UD92526

Section 4. Dual Conflicting Roles. No Executive Board Member shall be permitted to be the President of their unit Board during their term as an Executive Board Member. UD92526
(C&B Article V. Executive Officers, Section 4. Dual Conflicting Roles)

Section 5. Unit Assignment. All duly elected Unit Board Officers must be a member of the unit in which they are serving at all times, unless the Unit Board votes to allow the member to stay in office for the remainder of their term with a three-quarter's (3/4) vote and with the approval of the Board of Directors. The Board of Directors vote must take place within sixty (60) days of the change of unit membership. For the purposes of this section a Unit Officer shall be deemed a member for the duration of their term. UD92526
(C&B Article VIIII – Unit Executive Officers', Section 2).

Section 6. Proxy. A proxy will be appointed by the Association President or Unit President for a prescribed period of time where the proxy shall be granted Power of Attorney and shall act as the Unit President. UD92526
(C&B Article VIIII – Unit Executive Officers', Section 4).

ARTICLE V – UNIT EXECUTIVE BOARD

Section 1. Composition of Board. The Unit Executive Board shall be comprised of elected officers of the Unit and any other officers as provided for by the Governing Documents of this Association. UD92526

Section 2. Voting Members. Only elected officers or persons appointed to elected office pursuant to Article VI, Section 7, of this document shall have a vote on the Unit Executive Board. UD112816; UD121217

Section 3. Fiduciary Responsibility. The Unit Executive Board has a fiduciary responsibility to the members of the Unit. The Unit Executive Board shall approve any expenses in excess of amounts budgeted per line item and may establish reasonable and modest honoraria for the elected officers of the Unit in accordance with the Governing Documents of this Association. UD92526

Section 4. Quorum. Quorums for Unit Executive Board meetings shall be at least half of all elected/appointed officers; however, at all times there shall be a minimum of three officers to constitute a quorum. UD112816

Section 5. Governing Documents. The Unit Executive Board is responsible for adhering to the Governing Documents of the Association.

ARTICLE VI – DUTIES OF UNIT OFFICERS

Section 1. President.

a. The Unit President shall be the chief administrative officer of the Unit and shall preside at all meetings of the Unit and of the Unit's Executive Board.
b. The Unit President shall comply with the provisions outlined in SOP19-BD0329-1 (Appendix 1). and all applicable Association Governing Documents. UD92526
c. The Unit President, as a member of the Association's Board of Directors shall be responsible for their attendance at all Association meetings.
d. The Unit President shall be an ex-officio member of all unit established committees.
e. The Unit President shall direct and supervise the issuance of all publications.
f. The Unit President shall submit to the Unit Executive Board a proposed budget.
g. The Unit President shall, with the approval of the Unit Executive Board, appoint all unit committees. UD92526
h. The Unit President, as chief unit shop steward, shall appoint as many unit shop stewards as may be deemed necessary. UD92526

Section 2. Unit Executive Vice President. The Unit Executive Vice President shall assume the duties of the Unit President if the Unit President is unable to act for any reason or if the office becomes vacant. UD7312020

Section 3. Unit Vice President. The duties of the Unit Vice President(s) shall be those assigned by the Unit President or the Executive Board of the Unit. UD7312020

Section 4. Unit Treasurer.

a. The Unit Treasurer shall be responsible for the custody of all funds of the Unit. The Unit Treasurer shall keep an accurate account of all receipts and disbursements of Unit funds.
b. The Unit Treasurer shall submit an itemized report at each meeting of the Unit Executive Board including all other reports as the Unit President may require.
c. The Unit Treasurer's accounts shall be available for inspection by the officers of the Unit and the Association.
d. The Unit Treasurer shall be responsible for adherence of Governing Documents of the Association.
e. An annual estimated unit income of $2,500 or more requires filing with the Association, of a December 31st and June 30th financial statement on or before January 31st and July 31st each year. Unit incomes of less than $2,500 are required to file an annual report on or before January 31st of each year. These reports shall be presented to the Unit Executive Board. These reports shall be made available to the unit's entire membership and posted on the unit's bulletin boards for a period of not less than 30 (thirty) days. Also see Article XI, Section 7b. UD92421
f. The books and records shall be open at all times for the inspection by the Unit Executive Board, Association's Audit Committee, and Executive Board. The Unit Treasurer is responsible for the safekeeping of these records. UD92526

g. If the Unit Treasurer fails to make the records available, or in the event that the furnished records are deemed to be inadequate after a review by the Association's Executive Board and/or Board of Directors, and/or Audit Committee, the unit may be placed in interim trusteeship by the President of the Association subject to approval by the Board of Directors. UD121217

Section 5. Unit Secretary.

a. The Unit Secretary shall be the custodian of all non-financial records and papers of the Unit and shall give notice of all meetings and keep a complete and accurate record of all proceedings.
b. The Unit Secretary shall furnish the Treasurer copies of all motions regarding Unit funds.
c. The office of Unit Secretary/Treasurer, in such units that have this office, shall assume the duties of both the Unit Secretary and Unit Treasurer.
d. The Unit Secretary shall provide a copy of the minutes of all membership meetings and Unit Executive Board meetings to the Unit President within five (5) business days following the meeting. UD92526

Section 6. Training for Officers. The Unit Executive Board shall be expected to attend training programs as established by the Association. (Reference SOP08-BD1023-2: Training is mandatory) (Appendix 2). UD92421

Section 7. Vacancies.

a. In the event a Unit office becomes vacant the Unit President with the approval of the Unit Executive Board can appoint a member in good standing to the vacant position. UD112816
b. The Unit President must notify the Association of any change in elected officers within ten (10) days of such change except the office of the Unit Treasurer; the Unit President shall notify the Association's Treasurer within seven (7) business days of any change in this office. UD22219

Section 8. Honorariums.

a. The Unit Executive Board may establish reasonable and modest honoraria and their amounts for each Executive Officer of the Unit. Incumbent officers may not increase the amount of honoraria during their current term. Any changes in honoraria must be approved by the Unit Executive Board prior to the nomination of officers for the next term for those offices.
b. Honorariums shall be determined by the size of the unit, financial condition of the unit, time demands upon an officer, and the amount of unreimbursed expenses incurred by said officer for the unit.
c. The Unit Executive Board may establish an honorarium or change the existing amount, during a unit election year only. UD7312020
d. Any Change to Honorariums will take effect on July 1 of the new term of office and notification shall be made to the Association President and Treasurer within thirty (30) days of the approved change to be deemed valid.
e. Upon said creation or change, notice to the unit membership shall be widely

distributed.

f. A copy of the Unit Executive Board minutes containing the properly carried out motion, along with amounts, names, and addresses, of the affected officers shall be forwarded to the Association's Treasurer by January 15th of each year for the prior year for income tax purposes. UD92526
g. These amounts of monies must be reported on the individuals' income tax return and the burden of said reporting falls upon the individuals.
h. The total amount of honorariums for a unit shall not exceed twenty-five percent (25%) of said unit's annual rebate.

ARTICLE VII – SHOP STEWARDS

Section 1. Establishment of Shop Stewards. Each Unit may establish a shop steward program. All shop stewards may attend all regularly scheduled meetings of the Unit's Executive Board as non-voting members.

Section 2. Training for Shop Stewards. The shop stewards may attend training programs as established by the Association.

Section 3. Duties of Shop Stewards. The duties of the shop steward shall be those assigned by the Unit President or the Unit Executive Board. The Unit President may appoint or replace a shop steward as may be deemed necessary and must notify the Association of the appointment and/or removal of any shop stewards. UD22219

ARTICLE VIII – MEETINGS

Section 1. Required Unit General Membership Meetings. There shall be at least two (2) Unit General Membership Meetings each year. The two (2) Unit General Membership meetings are required to qualify for the Unit rebate. (Unit meeting minutes and Sign-in Sheets are required, minutes must be signed). UD92526

Section 2. Special Meetings. Special meetings shall be held within ten (10) working days upon receipt of a written request of either one-half of the Unit Executive Board or thirty (30) percent of the membership by petition. Such request must state the reason and agenda for such a meeting.

Section 3. Attendance at Board of Directors Meetings. In the event a Unit President cannot attend a Board of Directors meeting, the Unit President shall send an available member of the Unit Executive Board, complete a request to transfer Unit President Time form at least three (3) days prior to the Board of Directors meeting and provide a signed proxy on an approved Association form, to be delivered to the Recording Secretary upon arrival to the meeting UD112816; UD121217

Section 4. Required Unit Executive Board Meetings.

a. The Unit Executive Board must meet at least quarterly at a minimum, with one meeting held during each of the following periods:
   - **January 1st –March** 31st.
   - **April 1st–June** 30th.
   - **July 1st –September 30th** *(meeting minutes must include delegate selection, per-diem and mileage approval if applicable.*
   - **October 1st –December** 31st.*(meeting minutes must include budget approval)*

   Signed Minutes and sign-in sheets from each meeting must be submitted to the Association Recording Secretary **within 30 days** following the meeting date. UD92526
b. All meetings of the Unit Executive Board shall have minutes reflecting the actions taken by the board. (See Appendix 3, Appendix 4 for a sample template) UD92526
c. Convention Expenses (Per Diem) Meeting. The Unit Executive Board shall have a meeting after the per diem has been approved by the Board of Directors. Meeting minutes must be submitted showing that these expenses were motioned and voted on. UD22219

ARTICLE IX – UNIT EVENTS

a. No Unit shall conduct any income-producing activity without the prior consent of the Association Executive Board. All requests to conduct income-producing activity shall be submitted, in writing, to the Association Executive Board at least one (1) month prior to the commencement of the anticipated income-producing activity.
b. No unit is authorized to enter into any lease, contract or other agreement without prior approval of the Association's General Counsel and the Association's Executive Board.

ARTICLE X – DELEGATES

Section 1. Eligibility for Delegates. Each Association Unit's members shall be represented at Conventions by delegates. The Unit President, by virtue of that office, shall be a delegate. Each Unit is entitled to at least two (2) additional delegates for a total of three (3). Those Units with 301-399 members shall be entitled to an additional delegate and alternate. Any Unit that exceeds 399 members shall be entitled to five (5) delegates and four (4) alternates. UD92526
(C&B Article XVI – Conventions, Section 2, Delegates)

Section 2. Substitution for President. In those cases where a Unit President is unable to attend a convention, the next highest-ranking officer available shall attend in their stead. UD22219 **(C&B Article XVI – Conventions, Section 2, Delegates)**

Section 3. Delegate Vacancies. In those cases where a Unit's elected delegates are unable to attend a convention, the Unit President, with the approval of the Unit Executive Board, may appoint a member of the Unit, in good standing to attend that convention as a delegate. **(C&B Article XVI – Conventions, Section 2, Delegates)**

Section 4. Delegate Duties. All delegates shall report back to their respective units in a manner prescribed by the Unit's Executive Board. UD112816

Section 5. Delegate Expenses. The Unit shall be responsible for delegate expenses not covered by the Association. Reimbursement for these expenses cannot exceed the amounts authorized by the Association for such reimbursements. UD7312020

ARTICLE XI – UNIT FINANCIAL POLICIES

Section 1. Sales Tax. The Association is not exempt from sales tax. UD22219

Section 2. Unit Budget. The Unit Executive Board shall be required to approve a line item budget 30 days prior to the beginning of the fiscal year (January 1st- December 31st). The budget shall be prepared by the Unit's Treasurer on an Association approved form (Appendix 5) and accompanied by supporting schedules. The budget report shall be filed with the Association on or before January 31st of each year. After a period of six (6) months from the appropriate filing date, any unit rebates that have not been remitted to the unit, will revert back to the Association to be apportioned as needed, upon approval of the Board of Directors. UD92526

Section 3. Budget Posting. This report shall be made available to the unit's entire membership and posted on the unit's bulletin boards for a period of not less than thirty (30) days, immediately following adoption. UD121217

Section 4. Fiscal Year. The fiscal year of the Unit shall conform to the Association's fiscal year (January 1st- December 31st). UD112816

Section 5. Rebates. Each duly organized unit of the Association must comply with all the provisions of the Governing Documents of the Association in order to receive the rebate payment. Rebates allocated to Units from the Association are given in trust by the Association on behalf of the entire unit membership. All funds received by the Units shall be spent on behalf of their membership on the furtherance of official union business in accordance with the Governing Documents of the Association. The guiding principle shall be that funds shall be available to all members on an equal opportunity level. The officers of the Unit's Executive Board are expected to be ever mindful of their fiduciary responsibility to their membership, as well as the Association's membership at all times. If there is a question of authenticity in regard to income and expenditures of the unit, the Association's Treasurer must be consulted. UD92421

Section 6. Use of Unit Funds.

a. All funds rebated to the Units are rebated in trust on behalf of the members of the Unit.
b. All funds of the Units shall be used for the benefit of its members and the furtherance of legitimate union business in accordance with the Association Financial Code and Unit Operations Manual. UD22219

c. Fixed Assets: Unit monies utilized to purchase fixed assets must be reported to the Association Treasurer within ten (10) business days of purchase with the appropriate documentation, including adopted minutes, authorizing the purchase. All fixed assets must be reported on form 1(B). (Appendix 6). UD92625
d. No expenditures of Union funds shall be made without proper authorization. The Unit's Executive Board shall be required to approve any expenses in excess of amounts budgeted per line item. UD92421

Section 7. Prohibitive Uses.

a. No funds shall be disbursed that will result in personal profit to any officer of this Union, nor shall any officer profit from any company associated with this union.
b. No Unit shall conduct any income-producing activity without the prior consent of the Association Executive Board. All requests to conduct income-producing activity shall be submitted, in writing, to the Association Executive Board at least one (1) month prior to the commencement of the anticipated income-producing activity. UD92421

Section 8. Authorized Signatures. Withdrawals or drafts drawn upon the Unit accounts shall require the signature of at least two (2) officers of the Unit; one being the Treasurer and the second being the President or the Unit's Executive Vice President. UD121217

Section 9. Authorized Reimbursements.

a. Money reimbursed to an individual for expenses incurred during the official furtherance of union business may only be paid as defined in this manual. UD121217
b. Reimbursement for expenses shall be made upon approval of the Unit Executive Board unless previously authorized in the budget.
c. A person seeking reimbursement shall submit to the Treasurer an accounting of the expenses with all receipts and documents supporting such expenses.
d. No reimbursements shall be paid to any member who has been reimbursed for those expenses from another source. If the Unit Treasurer has any questions concerning reimbursements from other sources, the Association Treasurer must be contacted. UD121217
e. Income and expenditures of the unit must be in accordance with the adopted budget as passed by the Unit Executive Board and filed with the Association~~'s~~ Treasurer. UD121217

Section 10. Reimbursement for an Individual/ Vouchers.

a. All out-of-pocket expenses for the furtherance of official union business must be entered on an Association approved voucher. Expenses listed must be documented by a receipt and any other documentation deemed necessary. (Appendix 7) UD92526
b. Mileage Reimbursement shall be documented by actual odometer readings or the Suffolk County mileage chart. The rates for mileage reimbursement shall not exceed those rates contained in the Internal Revenue Service Tax Code. The purpose of travel must also be stated. UD121217

c. Vouchers must be submitted to the Unit Treasurer on a monthly basis. All vouchers must be submitted to the Unit Treasurer no later than the 30th of the month following the close of the month vouched for. Expenses claimed after this date are deemed to have been waived by the individual involved. Only under an extreme circumstance may a voucher submitted after this date be considered by the Unit Executive Board and payment may only occur after a properly carried motion of said Board.
d. All vouchers must be approved by the Unit President and the Unit Treasurer before reimbursement. In the case of a voucher being submitted by either the Unit President or Unit Treasurer, the voucher must also be approved by the Secretary. If the offices of Unit Secretary and Unit Treasurer are held by the same person, the Unit Executive Vice President must approve the voucher in place of the Unit Treasurer or Secretary, as applicable, so that the voucher contains the signatures of two individuals who are not submitting or receiving reimbursement from the voucher. UD92526
e. Submission of expense vouchers should be made monthly. Any vouchers submitted after the close of the following month shall require the approval of the Unit's Executive Board. UD92421

Section 11. Unit Audit. The Association shall audit any Unit's financials where there is a change in the position of the Unit Treasurer. The Unit Treasurer shall make available to the duly authorized representatives of the Association, at the request of the Association's President, Treasurer, or Audit Committee, all financial books, records, and supporting documentation for inspection. If the Unit Treasurer fails to make the records available, or in the event that the furnished records are deemed to be inadequate after a review by the Association Audit Committee, the unit may be placed in interim trusteeship by the President of the Association. UD7312020

Section 12. Union Monies. Any Union money derived from any source will not be utilized for any purposes involving Bargaining Unit Employees who are not Association Members. UD62918

The AME President maintains discretion to authorize individual expenditures outside this section. All Expenditures must be reported to the entire Executive Board. UD7312020

ARTICLE XII – FUND RETENTION

Section 1. Custody of Funds.

a. Any and all funds received in trust for, or on behalf of Unit members shall be deposited directly into a checking account maintained at a licensed and insured financial institution designated by the Association. UD92526
b. All accounts will be established and maintained in the name of *Suffolk County Association of Municipal Employees, Inc., SCAME/AME* Name of Unit (i.e.: Parks Unit). UD92526
c. Withdrawals or drafts drawn upon the Unit accounts shall require the signature of at least two officers of the Unit; one (1) being the Treasurer, and the second (2)

being the President or the Executive Vice President. Under no circumstances shall a check be drawn without the Unit Treasurer's signature. UD92526

d. **The use of ATM/CASH Cards is strictly prohibited**.

Section 2. Limitations. No officer shall invest, or cause to invest, Unit funds in any way that will result in personal profit or advantage for any officer or Association Representative. UD121616; UD121217

Section 3. Petty Cash. A single petty cash fund may be utilized under the following limitations:

1. 100 members or less - $25.00
2. 101 members to 500 members - $50.00
3. 501 members or more - $100.00
    a. Expenditures from this fund must be recorded on a petty cash voucher accompanied by a receipt and/or a signed petty cash slip. The voucher must contain the name of the person receiving the funds, the date, amount and purpose of the transaction. UD22219
    b. Recommended reimbursement to the fund is monthly. The Unit Treasurer may designate another officer of the unit as custodian of the fund if the Unit Treasurer's work site is inconvenient to the daily operation of the unit. As replenishment is needed, the voucher will be submitted to the Unit Treasurer for verification. After reconciliation by the Unit President (a tally of the expenditures compared to the receipts and petty cash slips must accompany the voucher submitted to the Unit President), the Unit Treasurer will issue a check payable to the custodian of the fund.
    c. At no time may any other income be placed into this fund nor shall the fund ever exceed the established maximum amount. A locked cash box should be utilized for the petty cash fund. UD121616; UD121217

ARTICLE XIII – ACCOUNTING RECORDS

All unit records will be computerized utilizing forms provided by the Association. All incoming funds by category, as well as all checks and cash expenditures by category, shall be reconciled on a monthly basis in a timely manner. All bank statements and records of expenditures should be available to members of the Unit Executive Board on a timely basis. UD92526

a. **Paid bills and invoices.** The documents must be marked with the check number, date, amount, and purpose of expense. In addition, all minutes of unit membership and Executive Board meetings pertaining to authorization of expenditures or reimbursement of expenditures shall be maintained and submitted to the Association. UD92526
b. **Ownership documentation.** Any and all receipts showing evidence of the purchase of any type of fixed assets belonging to the unit shall be maintained. If any fixed assets are purchased, the minutes and purchase information shall be forwarded to the Association Treasurer with the next set of financials submitted. UD92526

ARTICLE XIV – QUALIFICATIONS, INCOME AND EXPENSES

a. No unit is authorized to enter into any lease, contract or other agreement without prior approval of the Association's General Counsel and the Association's Executive Board. UD121217
b. Gifts of appreciation to any cause may not be made by the unit except those that directly benefit members and may include such items as acknowledgement of retirements, memorials to deceased members or any members in need with the approval of the Unit Executive Board. Expenses of this nature shall not exceed $300.00 per expenditure. UD92526
c. Contributions to outside organizations or Association sponsored activities may be made only with the prior approval of the Association's Executive Board. UD121616; UD121217
d. No contributions may be made, or any expenses incurred, by the unit for any political cause. Any and all such requests should be addressed to the Chairman of Suffolk County Association of Municipal Employees Political Action Committee, Inc. UD121616; UD121217
e. No unit shall incur any indebtedness nor shall any other financial obligation be incurred. "Indebtedness" shall be defined as any loans, advances, overdrafts, or mortgages from any bank, credit union, finance company, or retail credit company. UD121217
f. No unit may make any loans to any individual, corporation, or other entity. UD121217
g. In order to avoid duplication of services and unnecessary costs, no unit may appropriate funds for any professional services provided by the Association. UD121217
h. All expenditures shall be made by check. No check will be made out to "Cash". UD121217
i. No check shall be issued without proper documentation. Documentation shall consist of receipts and/or Unit Board minutes, which show approved Board action. UD22219
j. At the time a check is issued, the date, amount, payee, and purpose of the check shall be entered on the check stub. The checkbook balance shall be adjusted accordingly. UD121217

ARTICLE XV – REPORTING

Section 1. Financial Reports. All Units of the Association will be required to submit the following reports on forms supplied by the Association in order to qualify for a unit rebate. After a period of six (6) months from the appropriate filing date, any unit rebates that have not been remitted to the unit, will revert back to the Association to be apportioned as needed, upon approval of the Board of Directors. UD121616; UD121217

Section 2. Required Financial Reports: UD121217
a. Financial Statement (Form 2) (Appendix 8) UD92526
b. Disbursements (Form 2A) (Appendix 9) UD92526
c. Photocopy of all monthly Bank Statements

d. Copy of June 30th/December 31st Bank Reconciliations (Form 2B, 2B-1 2C & 2D if Petty Cash is used) (Appendix 10 a, b, c, d) UD92526
e. Budget Report (Form 1) (Appendix 5) UD92526
f. Budget Report (Form 1A if Honoraria is used) (Appendix 11) UD92526
g. Budget Report (Form 1B if Fixed Assets are to be purchased) (Appendix 6) UD92526
h. Budget Report (Form 1C necessary only to amend original Budget) (Appendix 12) UD92526
i. Copies of cleared checks (Front and Back) for expenses within period. If a unit cannot supply the front and back of checks, the Association shall obtain the information from the Financial Institution at the expense of the unit. UD121616
j. Copies of supporting documentation (receipts, invoices, etc.) of expenses.
k. Copies of signed unit general meeting minutes and sign-in sheets of said meetings are required as proof of the minimum two (2) general unit meetings which must be held within the calendar year. One held between January and June, and the other between July and December. Copies of each are to be submitted on or before January 31st and July 31st of each year. UD92526
l. Copies of signed unit Executive Board meeting minutes and sign-in sheets of said meetings are required as proof of the minimum four (4) unit Executive Board meetings which must be held at a minimum quarterly within the calendar year. UD92526

ARTICLE XVI – DISCIPLINARY PROCEDURE

Section 1. Charges. A charge may be brought against a member or officer of the Unit for:

a. a violation of the Association's Governing Documents; UD22219
b. any conduct which aids or supports a competing labor organization;
c. using the name of this Association or Unit for any unauthorized purpose;
d. misappropriation, embezzlement, improper or illegal use of the Association or Unit funds;
e. refusal or failure to carry out legally authorized mandates of the President, Executive Board, or Board of Directors;
f. knowingly submitting a false financial statement or audit to the Unit or Association;
g. conviction of a crime, the nature of which is such to bring disrespect to the Unit or Association;
h. solicitation or acceptance of any money or the acceptance of any gift of more than nominal value from any employer, member, group of members, employees of the Association or Unit or from any person or firm doing business with the Association or Unit or seeking to do so; UD22219
i. interfering with any elected official of the Association's or Unit in the discharge of that official's lawful duties; UD22219
j. a gross disregard of official duties.

All such charges shall be referred to the Association's Judicial Review Panel according to Article XIV, Section 2, of the Association's Constitution & Bylaws. UD92526

Section 2. Unit Trusteeship. Unit Trusteeship is defined as a method of supervision or control whereby the Association may suspend the autonomy otherwise available to a unit under its Constitution & Bylaws. During the trusteeship, the Association may suspend all autonomy of the unit's affairs that the unit would normally facilitate. See Constitution & Bylaws Article XV- Unit Trusteeship. UD92526

ARTICLE XVII – UNIT FUNDRAISING ACTIVITIES

a. All unit fund-raisers shall be proposed to and approved by the Association's Executive Board accompanied by: UD22219
    1. Itemized list of anticipated expenses
    2. Itemized list of anticipated revenues
    3. Projected profit margin
b. No expense will be disbursed without a receipt and the approval of the Unit President. UD121217
c. A report will be filed quarterly with the Association's President. Such report shall contain: UD121217
    1. An itemized list of actual revenues
    2. An itemized list of actual expenses
    3. An actual profit figure

ARTICLE XVIII – MISCELLANEOUS

Section 1. Parliamentary Authority. The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern the Unit in all cases to which they are applicable, and in which they are not inconsistent with the Governing Documents of the Association and any special rules of order the Association may adopt. UD22219
(C&B Article XXVIII – Parliamentary Authority)

Section 2. Dissolution/Decertification/Disaffiliation.

a. In a case where a unit or units are restructured or dissolved, the funds in the respective unit accounts as well as any entitled rebate funds shall be apportioned in such a manner as the unit members are assigned into new units.
b. The Executive Board will determine the disposition of any fixed assets if necessary.
c. In the event a unit decertifies or disaffiliates– all books, records, funds, and property shall be delivered to the Treasurer of the Association and shall become the property of the Association, pursuant to Constitution & Bylaws Article XXIV Association Property and Material. UD92526

Section 3. Supremacy Clause. Any inconsistencies, irregularities, or ambiguities with any of the provisions of this Unit Operations Manual or its interpretation shall be resolved in favor of, and consistent with, the supreme and pre-emptive authority of the Association's Constitution & Bylaws and its official policies. UD92526

This Active Unit Operations Manual was amended and adopted at the Board of Directors meeting on 09/25/2026.

_____
Michele A. O'Connell
Recording Secretary

APPENDIX

Appendix 1

SOP19-BD0329-1

SOP

BOARD OF DIRECTOR FEES

Whereas Unit Presidents are the primary Unit Officer in charge of Association business for their unit, are held to standards of law above that of other unit officers and unit members and, are compensated by the Association for the burden of carry out the functions of that office;

Whereas non for-profit corporate law is just one standard governing Unit Presidents which includes the Duty of Loyalty and Duty of Care provisions required of all corporate officers as a court admissible minimum conduct benchmark;

Whereas Unit Presidents are responsible for and are held accountable to the units they've been entrusted with including but not limited to;

1. **Attend all meetings as listed**

- Board of Directors
- AME Conventions
- AME General Membership meetings
- Unit Board meetings
- Unit General Membership meetings
- Committee meeting as assigned by the President

2. **Ensure Unit Board compliance with financial and operational requirements of the Association as currently written in all Association Governing Documents**

3. **Obtaining unit membership attendance as assigned and including:**

- All Unit meetings
- AME Unit meetings
- AME General meetings
- AME Lobby Day
- Political Action events

4. **Dissemination of Association business to unit members with adherence to the truth and tone that Association business was conducted**

5. **Respond to or delegate response to unit membership requests for information and/or assistance on all unit related issues**

6. **Issue Field Reports to Association Liaison assigned to unit on all matters concerning:**

- Contract grievances
- Disciplinary matters
- Health and safety issues

Therefore, be it resolved; that Association President shall monitor and report to the Board of Directors through the issuance of the Director's Report all compliant Association Units and Unit Presidents;

That any noncompliant Unit President will forfeit to the General Fund any compensation earned within a reporting period in which the Unit President failed to adhere with the requirements set forth above;

Finally, that compensation forfeiture is not within the purview of the Board of Directors, Executive Board, nor the President of the Association to rescind once forfeited.

Board of Directors Meeting, March 29, 2019 (pages 3-4)

Appendix 2

SOP08-BD1023-2

SOP

MANDATORY TRAINING SESSIONS

All duly elected Unit Board Officers will be required to take appropriate training as per their title as part of their fulfilment of office.

Board of Director's Meeting, October 23, 2008 (page 10)

Appendix 3

(UNIT NAME)
Unit Executive Board/Unit General Membership
Meeting Agenda
XX/XX/XXXX
X:XX AM/PM

1. CALL TO ORDER
2. PLEDGE OF ALLEGIANCE
3. MINUTES
4. RATIFICATION OF ELECTRONIC VOTES
5. TREASURERS REPORT
6. UNFINISHED BUSINESS
7. NEW BUSINESS
8. ADJOURN

NEXT UNIT EXECUTIVE BOARD/UNIT GENERAL MEMBERSHIP MEETING:

Appendix 4

(UNIT NAME)
Unit Executive Board/Unit General Membership
Meeting Minutes
XX/XX/XXXX
X:XX AM/PM

IN ATTENDANCE:

1. CALL TO ORDER AT (TIME)
2. PLEDGE OF ALLEGIANCE – Rendered by (MEMBER NAME)
3. MINUTES
4. RATIFICATION OF ELECTRONIC VOTES
5. TREASURERS REPORT
6. UNFINISHED BUSINESS
7. NEW BUSINESS
8. ADJOURN

NEXT UNIT EXECUTIVE BOARD/UNIT GENERAL MEMBERSHIP MEETING:

Appendix 5

SUFFOLK WORKS BECAUSE WE DO!

Unit Name Name

Year Year

BUDGET - Form 1

INCOME	PROPOSED BUDGET	ADOPTED BUDGET (Approved by Unit Board)	ADOPTED AMENDMENTS (attach Form 1C)	ADOPTED / AMENDED BUDGET	
Unit Rebate				-	
Interest				-	
Remaining cash bal. - prior yr end				-	
Other				-	
				-	
				-	
TOTAL INCOME	$ -	$ -	$ -	$ -	
EXPENSES					
Honoraria **(attach Form 1A)**				-	from Form 1A
Proposed Honoraria Change (attach Form 1A)				-	
Proposed Fixed Assets (attach Form 1B)	-			-	from Form 1B
Convention Expenses				-	
Meeting Expenses				-	
Printing & Postage				-	
Supplies				-	
Social Events				-	
Travel/Associated				-	
Telephone Expense				-	
Equipment Purchases				-	
Education				-	
Scholarships				-	
Bank Charges				-	
Other (with explanation below)				-	
TOTAL EXPENSES	$ -	$ -	$ -	$ -	
PROFIT (LOSS)	$ -	$ -	$ -	$ -	
(total income less total expenses)					

UNIT PRESIDENT **DATE**

UNIT TREASURER **DATE**

The Unit Executive Board shall approve the Unit Budget by **December 1st** of each year.

The Adopted Budget shall be submitted to the AME Treasurer on or before **January 31st** of each year.

Appendix 6



PROPOSED FIXED ASSETS - Form 1B

Unit: Name

Year Year

DESCRIPTION	PURPOSE	PROPOSED AMOUNT
	TOTAL (to Budget - Form 1)	$ -

Appendix 7

Suffolk AME
SUFFOLK WORKS BECAUSE WE DO!

EXPENSE VOUCHER

*Month/Year*_____

Page _____ *of*_____

SUPPLIES/SERVICES

Date of Purchase	Description of Item/Service	Amount	* Cash Expense/Witness

(Attach & sign all receipts) **Total Expense:** _____

MEETING EXPENSES

Date	Type of Expense	Person(s)/Business Relationship	Amount

(Attach & sign all receipts, indicating who you were meeting with) **Total Expense:** _____

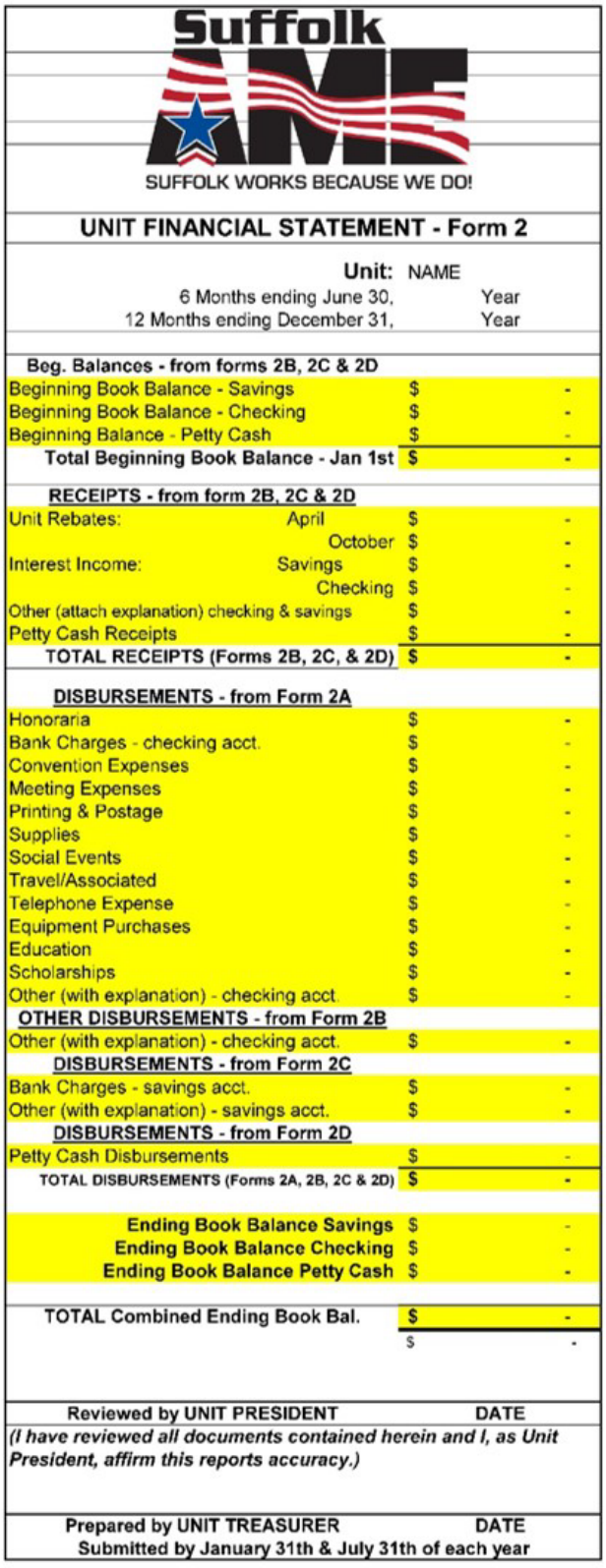
Total Expenses:	
Less Cash Advance:	
Amount Due AME:	
Amount Due Officer/AME Member:	

Prepared by
Name: _____
Title : _____
Hdqtrs./Unit: _____
Signature _____
Date _____

President's Approval: _____
Date: _____
Date of Payment: _____
Check #: _____
Treasurer's Approval: _____

* If there was no receipt possible for a cash expenditure, then an officer must witness the transaction and sign the voucher where indicated.

Appendix 8



Suffolk AME

SUFFOLK WORKS BECAUSE WE DO!

UNIT FINANCIAL STATEMENT - Form 2

Unit: NAME

6 Months ending June 30, Year

12 Months ending December 31, Year

Beg. Balances - from forms 2B, 2C & 2D		
Beginning Book Balance - Savings	$	-
Beginning Book Balance - Checking	$	-
Beginning Balance - Petty Cash	$	-
Total Beginning Book Balance - Jan 1st	**$**	**-**
RECEIPTS - from form 2B, 2C & 2D		
Unit Rebates: April	$	-
October	$	-
Interest Income: Savings	$	-
Checking	$	-
Other (attach explanation) checking & savings	$	-
Petty Cash Receipts	$	-
TOTAL RECEIPTS (Forms 2B, 2C, & 2D)	**$**	**-**
DISBURSEMENTS - from Form 2A		
Honoraria	$	-
Bank Charges - checking acct.	$	-
Convention Expenses	$	-
Meeting Expenses	$	-
Printing & Postage	$	-
Supplies	$	-
Social Events	$	-
Travel/Associated	$	-
Telephone Expense	$	-
Equipment Purchases	$	-
Education	$	-
Scholarships	$	-
Other (with explanation) - checking acct.	$	-
OTHER DISBURSEMENTS - from Form 2B		
Other (with explanation) - checking acct.	$	-
DISBURSEMENTS - from Form 2C		
Bank Charges - savings acct.	$	-
Other (with explanation) - savings acct.	$	-
DISBURSEMENTS - from Form 2D		
Petty Cash Disbursements	$	-
TOTAL DISBURSEMENTS (Forms 2A, 2B, 2C & 2D)	**$**	**-**
Ending Book Balance Savings	$	-
Ending Book Balance Checking	$	-
Ending Book Balance Petty Cash	$	-
TOTAL Combined Ending Book Bal.	**$**	**-**
	$	-

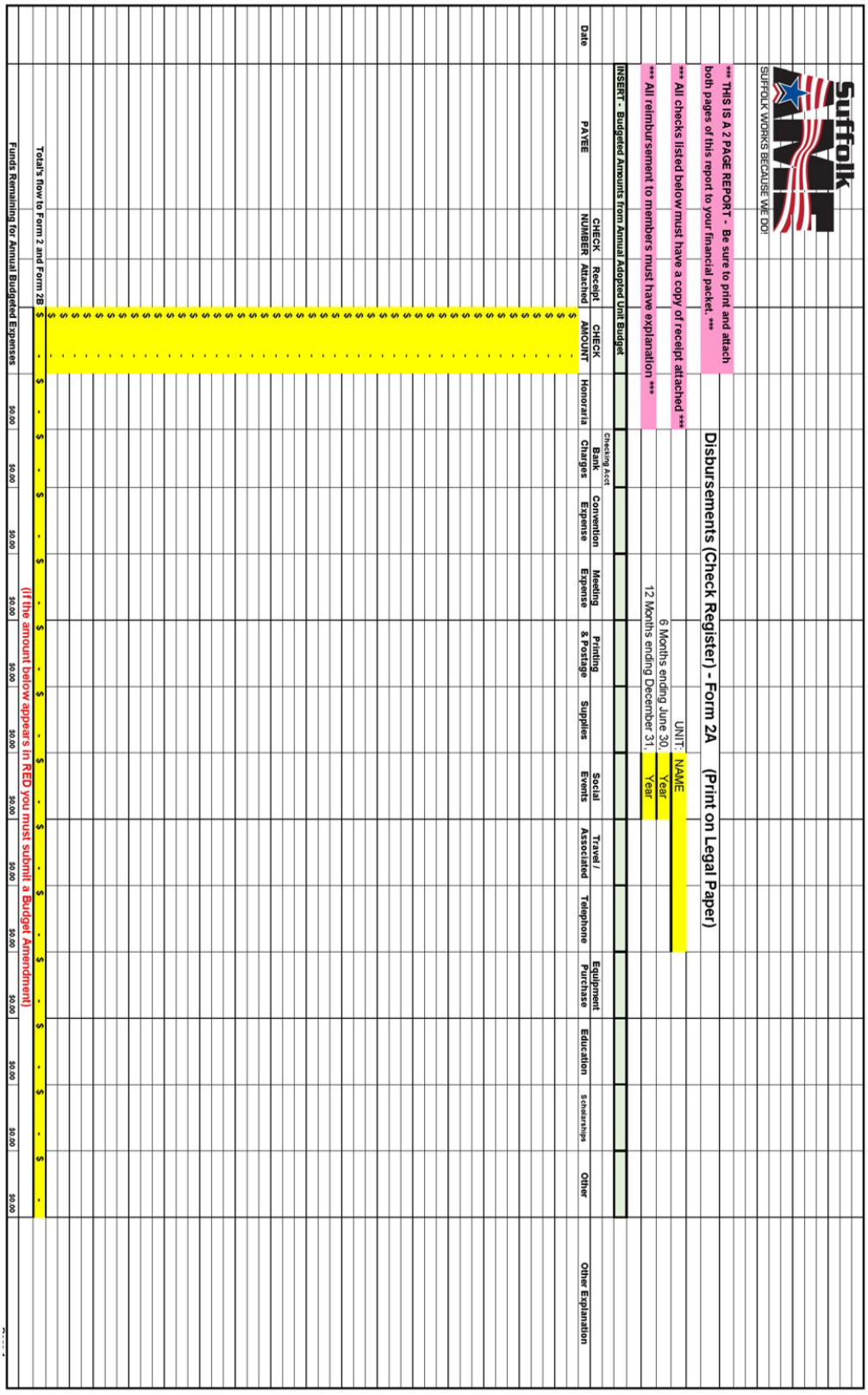
Reviewed by UNIT PRESIDENT **DATE**

(I have reviewed all documents contained herein and I, as Unit President, affirm this reports accuracy.)

Prepared by UNIT TREASURER **DATE**

Submitted by January 31th & July 31th of each year

Appendix 9



Suffolk

SUFFOLK WORKS BECAUSE WE DO!

*** THIS IS A 2 PAGE REPORT - Be sure to print and attach both pages of this report to your financial packet. ***

*** All checks listed below must have a copy of receipt attached ***

*** All reimbursement to members must have explanation ***

Disbursements (Check Register) - Form 2A (Print on Legal Paper)

UNIT: NAME

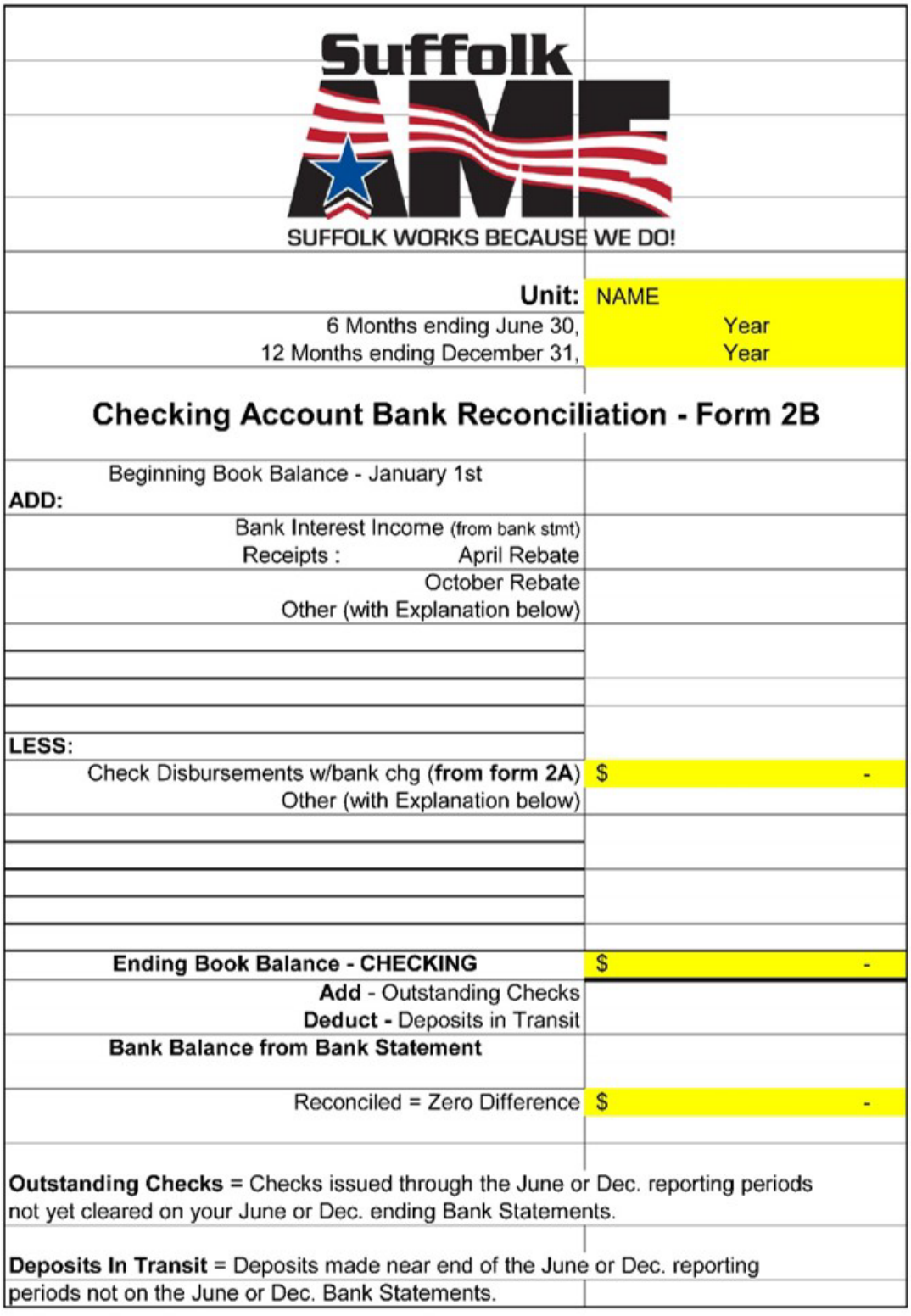
6 Months ending June 30, Year

12 Months ending December 31, Year

INSERT - Budgeted Amounts from Annual Adopted Unit Budget

Date	PAYEE	CHECK NUMBER	Receipt Attached	CHECK AMOUNT	Honoraria	Checking Acct Bank Charges	Convention Expense	Meeting Expense	Printing & Postage	Supplies	Social Events	Travel / Associated	Telephone	Equipment Purchase	Education	Scholarships	Other	Other Explanation
			$	-														
			$	-														
			$	-														

Appendix 10a



Appendix 10b



Unit:	NAME
6 Months ending June 30,	Year
12 Months ending December 31,	Year

Outstanding Checks - Form 2B-1

An OUTSTANDING CHECK is a check that that has been issued and has not cleared the bank.

All checks issued within the periods January - June and July - December must be listed on Form 2A

All outstanding checks must be listed on this Form 2B-1 and the total amount on this form will carry forward onto Form 2B - Checking Account Bank Reconciliation.

As the 1st half outstanding checks clear your bank account you must REMOVE those checks from this Form 2B-1 for your year end (December 31st) Checking Account Bank Reconciliation - Form 2B to be correct.

ISSUED Check Date	Check #	Payee	Amount

Appendix 10c



SUFFOLK WORKS BECAUSE WE DO!

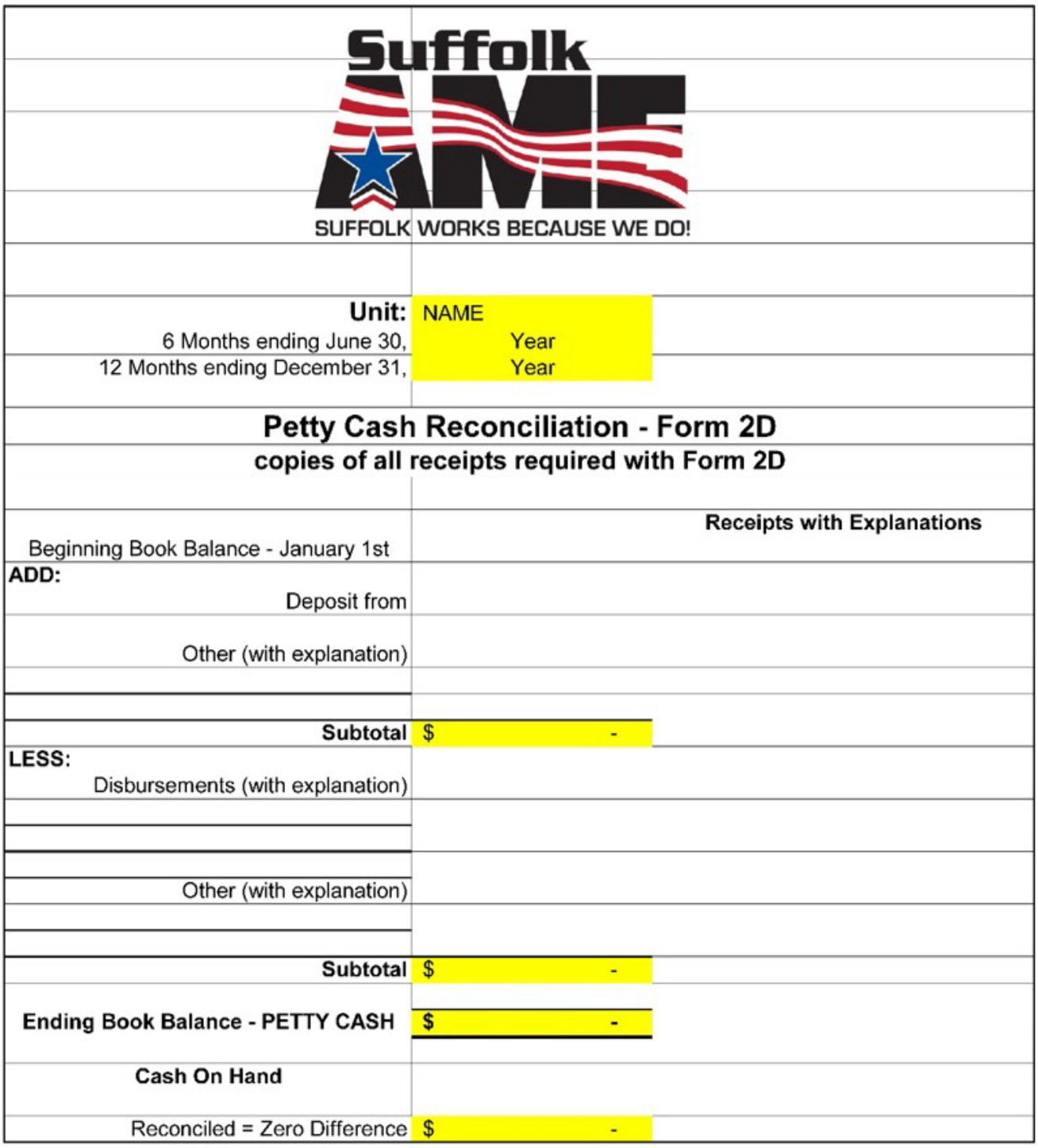
Unit:	**NAME**
6 Months ending June 30,	Year
12 Months ending December 31,	Year

Savings Account Bank Reconciliation - Form 2C

Beginning Book Balance - January 1st	
ADD:	
Bank Interest Income (from bank stmt)	
Receipts : April Rebate	
October Rebate	
Other (with Explanation below)	
LESS:	
Bank Charges	
Other (with explanation below)-transfers	
Ending Book Balance - SAVINGS	$ -
Deduct - Deposits In Transit	
Bank Balance from Bank Statement	
Reconciled = Zero Difference	$ -

Deposits In Transit = Deposits made near end of the June or Dec. reporting periods not on the June or Dec. Bank Statements.

Appendix 10d



Unit: NAME

6 Months ending June 30, Year

12 Months ending December 31, Year

Petty Cash Reconciliation - Form 2D

copies of all receipts required with Form 2D

		Receipts with Explanations
Beginning Book Balance - January 1st		
ADD:		
Deposit from		
Other (with explanation)		
Subtotal	$ -	
LESS:		
Disbursements (with explanation)		
Other (with explanation)		
Subtotal	$ -	
Ending Book Balance - PETTY CASH	$ -	
Cash On Hand		
Reconciled = Zero Difference	$ -	

Appendix 11



Unit Name Name

Year Year

PROPOSED HONORARIA - Form 1A

HONORARIUMS	BUDGETED	PROPOSED CHANGE
President Executive Vice President		
1st Vice President 2nd Vice President		
3rd Vice President 4th Vice President		
5th Vice President 6th Vice President		
Secretary Treasurer		
Totals (to Budget - Form 1)	**$ -**	**$ -**

Honorariums are established or increased only during an election year and take effect with the new term of office.

Appendix 12

	
Unit Name	**Name**
Year	**Year**
Date	**EXPLANATION OF BUDGET AMENDMENTS - Form 1C**