



## **PCCAC Education Toolkit**

Version 20. September 2022

Presented by: PCCAC Education Programming Sub-Committee

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## Introduction

Education has long since been a cornerstone of the many benefits offered to the Postal Customer Council (PCC) members. The most effective PCC groups utilize many avenues to ensure they are developing an excellent education program. A program that will bring value and educate business mailers on postal products, services, procedures, and policies to help grow their business. It is the intent of this document to provide tips, ideas, and best practices to aid you in accomplishing that end.

## Postal Customer Council (PCC) Mission Statement

The PCC is a postal-sponsored organization. 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 industry members and their organizations grow and develop professionally through focused educational programs.

The mission statement of every local PCC should mirror the mission statement above. Providing your PCC with creative, resourceful and engaging educational content will help to uphold the PCC Mission and foster a membership skilled in mailing as well as cultivate strong, strategic community within the mailing industry.

## Postal Customer Council Advisory Committee, (PCCAC), Education Programming Sub-Committee

The PCCAC is to function as an oversight body, providing guidance on PCC practices and bringing PCCs together for mutual gain in accomplishing the PCC Mission.

The PCCAC Education Programming Sub-Committee, is responsible for this document and as such, we are open to suggestions. It is a living document that will continue to grow and expand. So, please engage with us. You may contact the members of the PCCAC Education Toolkit Sub-Committee by emailing [pcc@usps.gov](mailto:pcc@usps.gov). You may also contact your HQ Postal PCC Liaison.

## Publication 286 and Bylaws

Every PCC Board of Directors must know and understand Pub 286 and the addendum policies that support it. Download it from <https://postalpro.usps.com/pcc>. If you have any questions about the document, reach out to the PCCAC Strategic Innovation and PCC Policy Sub-Committee by emailing [pcc@usps.gov](mailto:pcc@usps.gov).

Equally as important to the success of your PCC is your own bylaws. Make sure each board member is aware and familiar with your bylaws.

It is recommended that you review Pub 286 complete with its addendums, plus your bylaws once per year with your board.

## Area Postal and Industry PCCAC Liaisons

Each USPS Area has a HQ Postal and Industry PCC Liaison(s) that you can use as a resource. Below are the names and contact information for each Area.

### 2022 USPS Headquarters and Industry PCC Liaison(s) Contact List

Area	Name	Email Address
Atlantic ( <i>USPS lead</i> )	Judy Caldwell	<a href="mailto:Judith.r.caldwell@usps.gov">Judith.r.caldwell@usps.gov</a>
Atlantic ( <i>Industry lead</i> )	Mark Fallon	<a href="mailto:mmf@berkshire-company.com">mmf@berkshire-company.com</a>
Atlantic ( <i>USPS support</i> )	Brian Corley	<a href="mailto:Brian.corley@usps.gov">Brian.corley@usps.gov</a>
Atlantic ( <i>Industry support</i> )	Joe Banks	<a href="mailto:joseph.banks@usmc.mil">joseph.banks@usmc.mil</a>
Central ( <i>USPS lead</i> )	Sharon Barger	<a href="mailto:sharon.a.barger@usps.gov">sharon.a.barger@usps.gov</a>
Central ( <i>Industry lead</i> )	Neal Fedderman	<a href="mailto:neal_fedderman@CarMax.com">neal_fedderman@CarMax.com</a>
Central ( <i>USPS support</i> )	Donna Thabet	<a href="mailto:donna.thabet@usps.gov">donna.thabet@usps.gov</a>
Central ( <i>Industry support</i> )	Rob Hanks	<a href="mailto:rob.hanks@suttle-strauss.com">rob.hanks@suttle-strauss.com</a>
Southern ( <i>USPS lead</i> )	Da Shiek Woodard	<a href="mailto:dashiek.f.woodard@usps.gov">dashiek.f.woodard@usps.gov</a>
Southern ( <i>Industry lead</i> )	Kathy Hall	<a href="mailto:Kathy@ATIME4Marketing.com">Kathy@ATIME4Marketing.com</a>
Southern ( <i>USPS support</i> )	Eric Roberts	<a href="mailto:Eric.m.roberts@usps.gov">Eric.m.roberts@usps.gov</a>
Southern ( <i>Industry support</i> )	Monica O'Connor	<a href="mailto:monica.oconnor@moneypages.com">monica.oconnor@moneypages.com</a>
WestPac ( <i>USPS lead</i> )	Lewis Johnson	<a href="mailto:lewis.l.johnson@usps.gov">lewis.l.johnson@usps.gov</a>
WestPac ( <i>Industry lead</i> )	Dina Kessler	<a href="mailto:dkessler@kesslercreative.com">dkessler@kesslercreative.com</a>
WestPac ( <i>Industry support</i> )	Suzi Oswald	<a href="mailto:Suzi.Oswald@seachangemn.com">Suzi.Oswald@seachangemn.com</a>

*\*Subject to Change\**

## Education Committee and Chair

Every PCC should have an Education Committee led by an Education Chair. The Education Chair will work closely with the PCC Board Members to develop the Educational events and/or calendar. The Education Chair should present future plans and past results at each monthly board meeting.

## Education Best Practices

### What is needed to plan your events?

- Dedicate a particular month(s) for your board to plan your future events.
- Determine which PCC Premier Award your PCC will strive for: Bronze, Silver, or Gold.
- Determine if you will participate in the Professional Certificate and Track Program 3.0 (located in *PCC BlueShare*).
- Survey/Poll your members on topics, meetings, and events that they need or want.
- Board Members should bring:
  - A list of meeting event ideas.
  - Proposed event dates along with event times.
  - Ideas of special events for the year.
- Review the Speakers Bureau List for additional topics (located in *PCC BlueShare*).
- Use the Event Planning template 3.0 (located in *PostalPro* – Education Tab).
- Determine if you will have in-person, virtual, or hybrid events.
- Decide if you will partner with local PCCs on events.
- Schedule quarterly program reviews to ensure on track.

### How to determine educational needs within your PCC:

- Select topics by using the Professional Certificate and Track Program 3.0 (optional).
- Communicate with your members what they need and want.
  - Board calling members
  - One-on-one conversations with members
  - Survey your members through email, newsletters, postal events, website
  - Zoom Chat, Town Halls, Polling
- USPS Management and Support can be a great resource.
  - District Marketing Manager (BME, Retail, C&I)
  - Plant Manager (Operations, Equipment, Transportation)
  - Customer Relations Coordinator (Postmaster, local Post Office)
  - Business Mail Entry Manager (Mailing Standard Specialist, Mailpiece Design)
  - Consumer & Industry Contact Manager (Business Service Network)

### Types of educational events (in-person, virtual, or hybrid):

- Breakfast Event
- Brown Bag Event
- Certifications through the National Center for Employee Development
- Evening or Happy Hour Social
- Family Event (Where you allow members to bring their family (e.g. bowling, ball game, picnic))
- Lunch and Learn
- Meet and Greet (e.g. Breakfast with the Postmaster, Panel of postal experts)
- Networking – Peer-to-Peer Discussions
- Round Table Event
- Tours (in-person or virtual)
- Town Hall Meeting
- Virtual via Zoom

## Examples of Educational Topics:

- Ask the Expert Panel Discussion
- Borrow topics from past National Postal Forum sessions
- Business Customer Gateway
- Cost Analysis
- Cybersecurity
- Direct Connect
- E-Commerce Shipping
- Enterprise Payment System
- Every Door Direct Mail Retail vs BMEU
- Increase the Value of Mail and Print, Business Mail 101
- Informed Customer Experience
- Informed Delivery
- Informed Visibility
- International Postal Changes
- Mailpiece Design
- Mail Through the Millennia
- Navigating Postal Websites and applications
- Political and Election Mail
- Seamless Acceptance
- Ship Smarter
- Small Business Mail Expo
- Strategic Marketing: Are You Marketing or Are You Really Marketing?
- Transportation
- USPS Price Change and USPS Promotions

**Please note – Educational topics don't always have to be Postal. You can choose topics that will benefit both Industry and Postal Members\*\*, such as;**

- Active Shooter
- COVID-19
- Financing and Retirement
- First Responder/First Aid/CPR
- Health and Wellness
- Industry Trends
- Innovation
- Inspirational
- Leadership
- Motivational
- Personal Development
- Professional Development
- Safety – Slips/Trips/Falls – Driving – Trucks
- Weather – Disaster Preparedness

*\*\*It's recommended to avoid direct sales presentations. Remind your speakers that they are there to speak for their industry, not just their company.*

Additional topics can be found in the Speakers Bureau List (column A), posted in *PCC BlueShare* in the Resource Folder.

## Workshops-In-a-Box:

In *PostalPro* – PCC Workshops, you will find PowerPoint presentations that can be used for your next event. To access these presentations, go to: <https://postalpro.usps.com/pcc#section-6>. If you have a presentation to share, please email it to [PCC@usps.gov](mailto:PCC@usps.gov) and in the subject type: Share on *PostalPro*.

## Where you can hold in-person meetings and events\*:

- Chamber of Commerce
- Colleges, Universities, and Public Libraries
- Commercial Companies (e.g. Museums, Zoos, Civic Venues)
- Cruise
- For location restrictions refer to Pub 286 (Wineries and Casinos)
- Hotels
- Industry Member Facility
- Postal Facilities
- Restaurants
- Sporting Venues

\*Before hosting an in-person or hybrid meeting/event, verify with the venue. PCCs must abide by the Postal and Centers for Disease Control Guidelines. Also check your local City/State Mandates.

- Masks
- Social Distancing
- Number of attendees allowed

## Selecting a Speaker(s):

- Headquarters Speaker(s)
  - Must complete the Speaker Request Form located in *PCC BlueShare* in the Resource Folder.
  - Submit completed form to your PCC Headquarters Liaison.
  - Upload a copy in *PCC BlueShare* – Resource Folder – Speaker Request Submission.
- Industry Speaker(s)
  - View the Speakers Bureau list posted in *PCC BlueShare* in the Resource Folder.
  - If available, view the Speakers bio located in *PCC BlueShare* in the Resource Folder.
  - Any Board member can reach out to the Industry speaker directly.

## Methods of Teaching:

- Lecture Method – Oral presentation presenting the information via Zoom
  - Tools used to engage attendees:
    - Breakout Rooms
    - Vision Board
    - Chat (Ice breaker)
    - Polling
- Discussion Method – A forum to facilitate open ended exchange of ideas to further the mission of your PCCs.
  - Board Meeting
  - Round table
  - Think Tank

## Methods of Teaching continued:

- Project Method – Solving a practical problem such as executing a large event together.
  - National PCC Week
  - Holiday Celebration
  - Membership Appreciation
  - Recognition Program
  - Any large event
- Unit Method – When a PCC feels something of value needs to be measured towards improvement and the success of their PCC.
  - Number of attendees at an event
  - Number of responses to a survey
  - Number of new members signed up
  - How effectively did your PCC market the event?
  - How effectively did your PCC raise funds?
- Survey Method – When a PCC gathers data by asking questions.
  - SurveyMonkey
  - Polling
  - Handouts at an event
  - Verbal Q and As
- Learning Tools to reinforce speaker or workshop, or help engage attendees on a Zoom meeting are:
  - Bingo
  - Chat
  - Family Feud or Jeopardy or other games
  - Spin the Wheel

## How to promote your educational event (in-person, virtual, or hybrid):

- Direct Mail
- Distribute or publish your calendar
- Email
- Flyers at the USPS Business Mail Entry Unit
- Newsletter
- Partner with the USPS Business Service Network, Business Development Specialist or Sales
- PCC Virtual Calendar
- Post on PCC Voice LinkedIn Group (<https://www.linkedin.com/groups/8303549/>)
- USPS TeamSite (PostalPro – Find a PCC event – PCC Administrator function)
- Word of mouth

## Education Feedback and Surveys:

Soliciting for feedback is vital when planning an event or when an event has ended. Your PCC Education Committee should create surveys and use them:

- At the beginning of the year to inquire what your member's needs and wants are. This will help when determining what topics to have throughout the year.
- At the end of every event. This will also help your PCC in knowing if the event was successful.



## Education Feedback and Surveys continued:

Surveys can be as simple as:

- Creating questions and answers in a word doc
- Using a survey engine like SurveyMonkey
- Using the Polling feature in Zoom

Surveys can be administered:

- In-person
- Mail (G-10 permit)
- Email
- Zoom

## Thanking – Boards, Committees, Members and Speaker(s):

- Remember to always “Thank” your Board, Committees, Members, and Speaker(s)
- Show appreciation with a “gift”
  - Industry – No \$ cap amount
  - Postal – \$20 per event or \$50 per calendar year
  - Suggested Items:
    - Framed postal art, plaques, or trophies. (When considering framed art, be considerate if speaker has spoken at several events.)
    - Consider memorabilia from your area; e.g. themed cups, mugs, blankets, special food, candies, etc.
  - Offer to mail it for the speaker (if traveling).
- Thank-you cards
  - USPS stationary
  - Board can all sign a stack of cards at the beginning of the year; appoint someone (secretary) that would send them out as needed.

## National Center for Employee Development (NCED) – 6-weeks’ Notice

NCED will present the following topics at your next event via Zoom. For more information on any of these topics and to request a speaker, please contact [postalcertifications@usps.gov](mailto:postalcertifications@usps.gov).

- Addressing
- Automation/IMb
- Basic Mailpiece Design
- Classes of Mail
- Direct Mail/Return on Investment
- Nonprofit
- Periodicals
- Postage Payment Methods
- Postal Explorer/DMM Orientation
- Safety in the Mailroom
- UAA Mail

## USPS Certification Programs:

NCED offers three different certification programs. For more information on any of these topics and to request a speaker, please contact [postalcertifications@usps.gov](mailto:postalcertifications@usps.gov). The programs that are offered are:

- Mail Design Professional, (MDP)
- Executive Mail Center Management, (EMCM)
- Certified Direct Mail Professional, (CDMP)

## Tips and Tools for Success

### Event Planning Template 3.0:

To ensure the PCC is timely and within their budget when preparing their event, the Education Committee should utilize the PCCAC Education Sub-Committees “Event Planning Template 3.0” or their own template. This tool, Event Planning Template 3.0, is in *PostalPro* in the Education section. The tool features:

- A checklist for the day of event
- A timeline to assist when planning an event (in-person or virtual)
- A timeline to assist when planning National PCC Day (in-person or virtual)
- Budget assistance with:
  - Expenses
  - Income
  - Profit Loss Summary

### Professional Certificate and Track Program 3.0:

The PCC Advisory Education Programming Sub-Committee is pleased to announce the revised **Professional Certificate and Track Programs 3.0**. PCCs can participate in one or both programs and as many tracks as they want to partake in.

#### Track Programs:

The *Track Program* has three different tracks: Leadership, Mailing and Shipping. When a PCC participant reaches the required number of educational events, the PCC will mail the participant a **Certificate of Achievement** to use as a training record or proof they have attended a PCC event.

#### Track Program – To Qualify

- Leadership, Mailing, or Shipping
  - To receive the certificate, the PCC Member(s) must attend **four (4) sessions** that fall into the track selected by the PCC.
    - Events can be hosted by the local PCC, another PCC, PCC Advisory Sub-Committee, and/or the Headquarters National Program Office.
- After the member(s) attends the event, they need to inform their point of contact (POC) providing the date of event, PCC who hosted event, and topic name.
  - POC will enter the information onto their Tracking Spreadsheet.
  - When the member(s) has reached the required **four (4) sessions**, the POC will download the Certificate Template, print, and mail it to the member.

## Professional Certificate and Track Program 3.0 continued:

### Professional Certificate Program:

The Certificate Program has no tracks, but instead is based on a tier level. With this program, after each event a member(s) attends, the PCC will mail their member(s) the certificate. The tier level is based on the number of events their member(s) attends. The tier levels are: Emerald, Ruby, Sapphire, and Diamond.

### Certificate Program – To Qualify

- To receive a certificate, the PCC member(s) must attend an event sponsored by the local PCC, another PCC, PCC Advisory Sub-Committee, and/or the Headquarters National Program Office.
- After the member(s) attends an event, they need to inform their POC providing the date of event, PCC who hosted event, name of topic.
  - POC will enter the information onto their Tracking Spreadsheet.
    - Member will receive Emerald Certificate after their first, second, and third PCC event
    - Member will receive Ruby Certificate after their fourth PCC event
    - Member will receive Sapphire Certificate after their fifth PCC event
    - Member will receive Diamond Certificate after their sixth PCC event
  - When the member(s) has reached the required number of events, the POC will download the Certificate Template, print, and mail it to the member.

### How to Start Using the Programs:

- PCCs need to download the Tracking Spreadsheet (attached).
- Determine which Program (Certificate or Track) they want to participate in.
- If they select the Track Program, then they need to decide which track(s) they will follow: Leadership, Mailing, or Shipping.
- Select a POC who will oversee the program.
- POC will input their members contact information onto the “*master tab*” on the Tracking Spreadsheet.
- Inform your members of the program via email, website, a mailing, *PCC Voice* LinkedIn, etc.
- Explain to your members as they attend PCC events in 2022, hosted locally, by another PCC, PCC Advisory Sub-Committee, and/or the Headquarters National PCC Program Office, the member will need to inform the POC once an event is completed, as well as, any events they attended prior to the PCC starting the program.
- The POC will track the number of events their member(s) attended on the Tracking Spreadsheet.
- Once the member has reached the required number of attended events, the POC will mail them their certificate (attached). (*This mailing will also count towards your PCC Premier Certificate – “mailing with a G-10” requirement.*)
- To support the program, PCCs should host events that match the program they selected. For example: If the PCC selected the Leadership Track, then their event topics should be all about Leadership.
- PCCs can use the *Speakers Bureau List* on *PCC BlueShare*, in the Resources Folder, to find a list of topics. There is a column to support the tracks.
- All documents are attached and are also posted on *PCC BlueShare*, in the Resources Folder.

## Examples of what other PCCs have done:

- Combine events with other PCCs
- Consider hosting an event geared to a specific audience and advertise to them (e.g. have a package workshop) instead of a one-size-fits-all event
- Family outing at a sports venue, Zoo, Picnic in a Park
- Golf Tournament/Bowling Tournament
- Have a mini National Postal Forum prior to NPF to generate interest
- Holiday Celebrations
- Host a “mail crawl” (Visit different industry members’ businesses to see how they process the mail.)
- Host a First Day of Issue stamp ceremony
- Host a passport fair
- Host a Tour (Postal and Industry)
- Host one of the three certification courses that is offered by National Center for Employee Development
- Invite USPS Sales to do a cost analysis
- Local Hero Appreciation Day
- Membership Appreciation Day
- Recognition Program
- Set up a table at a College Job Fair
- Sponsor Local Charity – Toys for Tots, Operation Santa, Food Drive (Make sure you follow the guidelines as stated in the Administrative Support Manual.)
- Town Hall – Invite Postal leadership to be on a panel and answer questions

## Educational Partnerships

PCCs can always partner together when planning monthly events or the National PCC Week event. By partnering, a PCC that is either struggling or newly created will benefit financially and experientially from the association learning practical best practices from the other PCC(s) structure.

## Event Sharing (virtual or hybrid):

Due to the Pandemic, PCCs can share Headquarters National Zoom events or other PCC events with their General Members and still receive credit towards their Premier Certificate requirements. To receive credit, PCCs must:

- Promote the event to their General Members (Email or Mail)
- Post it on TeamSite (Must meet requirement per Premier Certificate)
- Post it on PCC Voice LinkedIn (Must meet requirement per Premier Certificate)
- Post it on their Website (optional)

You can find upcoming PCC events on the PCC Virtual Calendar located in PostalPro, Virtual Events. <https://postalpro.usps.com/node/9226>.

## Event Sharing (In-person):

There are some parameters that must be addressed before a shared event can be organized. Below are some details:

- Planning
  - All PCC Boards need to select at least one designee
  - PCCs need to decide on what your PCC can contribute to the shared event
  - Representatives must discuss and agree on all aspects prior to hosting the joint event
  - Create Agenda
- Venue
  - Select a location where all members from all PCCs will have equal travel time
  - If a contract needs to be signed, it must be done by the PCC Co-Chair (Refer to Pub 286)
- Cost
  - PCCs need to define cost sharing expenses
  - Ask for sponsors
  - Ask for free donations
- Marketing
  - PCCs need to agree to either use the same marketing mailpiece or design their own
  - Each PCC will use their own mailing list
  - Use a G-10 label if applicable (Refer to Pub 286)
  - Mailpiece cannot say “sponsored by” but you can say “co presented” (Refer to Pub 286)
- Logo Use
  - On the PCC mailpiece or any digital marketing material, you can use all PCCs logos.
- Endorsement
  - Include a statement of non-endorsement on the PCC mailpiece, such as: “No endorsement by the Postal Service or the PCC is given or implied by this acknowledgement.”
- Topics
  - What topics are relevant for all PCCs involved (Postal and Non-Postal topics)
  - If time permits, consider break-out sessions (multiple topics)
- Vendors – In Person
  - PCCs need to discuss the options of having vendors
  - Give the Vendors a few minutes to promote and do a raffle drawing
  - Ask Vendors to donate toward event
- Speakers
  - Decide if you will have Postal or Industry speakers
  - Who will request Postal speaker(s) (Must be done through *PCC BlueShare*)
    - Who will request Industry speaker(s)
    - How will expenses be covered
- Registration
  - Which PCC will handle the registrants – one PCC or each individual PCC
  - How will registrants sign up and pay

## Resources

- PostalPro – This is your resource for all things PCC: <http://postalpro.usps.com/>
  - Connect with another PCC's
  - National PCC Home Page
  - PCC Best Practices
  - PCC Awards Criteria
  - PCC Policies and Practices
  - Education Tab
  - Workshop-In-a-Box
- BlueShare – USPS PCC Postal Co-Chair or PCC Postal Liaison or Administrator
- TeamSite – USPS PCC Postal Co-Chair or PCC Postal Liaison or Administrator
- PCC Voice LinkedIn
  - There are only two steps needed to join the group if you have not already registered.
    - Step 1: Sign up for a LinkedIn account ([https://www.linkedin.com/signup/cold-join?trk=guest\\_homepage-basic\\_directory](https://www.linkedin.com/signup/cold-join?trk=guest_homepage-basic_directory))
    - Step 2: Use this link to join the group (<https://www.linkedin.com/groups/8303549/>)