



Boston Chapter Info

Addendum to EFA Chapter Development Info

Last Updated 9/5/19 by Indu Guzman

This document lists additional information specific to the Boston Chapter of Editorial Freelancers' Association (EFA). Please refer to document EFA Chapter Development Info located in the Budget folder of the shared EFA_Documents folder. (EFA Documents>Budget and Reimbursements>Boston Chapter Info) EFA Chapter Development Info provides general information pertaining to organizing local chapters.

Policies and procedures that previous and current chapter coordinators have implemented and discussed are outlined here. The purpose is to ensure continuity and serve as a reference for new and current Boston chapter coordinators.

Events

- **Professional Development/Workshops.** Based on recent yearly surveys from 2016, most members expressed interest in workshops and professional development such as talks and workshops. So, the current consensus with chapter coordinators is to prioritize professional development.
- **Socials.** For social events, surveys resulted in mixed results but showed most members were not interested in attending casual social events on a monthly basis. Currently, EFA Boston holds two socials per year, a summer picnic and a winter get-together. In the past, locations were Panera, Starbucks, and outside on the lawn in front of Cambridge Public Library. Bars are avoided simply because of the noise volume and accessibility reasons.
- **Food/Drink.** Due to distractions during workshops, we elected not to offer food or drinks. For social events (such as the summer picnic), chapter funds can be used to provide catered food and items for the event. The only restriction set forth by EFA is that the costs for one event should not exceed a quarter or $\frac{1}{4}$ of the total chapter expenses for the year. If our chapter expenses exceed the approved guideline, permission is needed from our EFA Chapter Development Chair, Cynthia Williams chapters@the-efa.org

- **Alcohol.** The topic of providing alcohol during events is an ongoing discussion with EFA. The concerns are expenses, local laws, and potential liability issues. Our chapter decided to not use chapter funds to provide alcoholic beverages at events.

Finances

- **Presenter Honorariums.** Currently, our honorarium for presenters is: \$50 for EFA member presenter and \$100 for non-member presenter or member from out of town.
- **Presenter Honorarium Limitations.** Presenter honorariums should not exceed \$75 for presenters who are EFA members. The purpose is to encourage volunteer contributions from EFA members.
- **Presenter Reimbursement Procedure.** A check, cash, or PayPal payment to presenter will be made by one of the chapter coordinators, and then a request for reimbursement will be sent. Reimbursements will be mailed to the appropriate coordinator from the main office in the form of a check.

How to Submit a Reimbursement

Preplanning

- Please refer to the [EFA Chapter Development Info](#) document for EFA policy and guidelines listed above to verify that your purchase is within set guidelines.
- Check the Excel spreadsheet [EFA Budget](#) in the [Budget and Reimbursements folder](#) to see if the expense fits in within our allotted budget. Make sure you check the tab for the current year. Previous years' budget is also available.

Submitting Reimbursement Request

1. **Receipts.** Please save your receipts or proof of payment.
2. **Reimbursement Form.** Under EFA Documents>Budget and Reimbursements, you'll find a [Word Template REIMBURSEMENT TEMPLATE.dotx](#). Use this reimbursement form to fill out information.
3. The form along with receipts can be either sent through snail mail, fax, or email to the EFA office to the address or fax number listed below. The address, fax, and email where the form should be sent is also listed on top of the form.

Editorial Freelancers' Association	Fax: 212-929-5439
71 West 23rd Street, 4th Floor	Fax toll-free: 866-929-5439
New York, NY 10010-4102	
efa.christina.shideler@the-efa.org	

4. Once processed, usually within 2-3 weeks, a check will be mailed.
5. If you have any specific questions, please contact either Chapter Coordinator, Cynthia Williams chapters@the-efa.org or Christina Shideler efa.christina.shideler@the-efa.org in the EFA office.
6. **Update Excel Budget Spreadsheet.** Once the reimbursement form with receipts are sent to the EFA Office Manager, the [Boston Chapter Budget Excel spreadsheet](#) will need to be updated. An

updated spreadsheet will help other coordinators check up on the budget when making decisions about event planning and logistics.

- a. Click the tab for the current budget year
- b. Enter details under the appropriate month
- c. The updated remaining budget amount would automatically populate, if not please make sure it's corrected