

## Cooke, Sarah [MN]

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**From:** Rodney Rowe <public.affairs@edmn.org>  
**Sent:** Friday, March 27, 2020 9:36 AM  
**To:** Cooke, Sarah [MN]  
**Subject:** March 2020 Treasurer and Membership Newsletter

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# Treasurer and Membership

*Newsletter Notes*



THE VOICE FOR PROFESSIONAL  
EDUCATORS AND STUDENTS

## March 2020 Issue

I am sure that many of you, like me, are ready for spring and are also very concerned as we move into uncharted waters in regards to the COVID-19 pandemic. As you prepare to begin to deliver education via distant learning, I would encourage all of you to also prepare to take home with you any files or items that you may need in order to complete your union role as membership chair or treasurer.

As we head into March, I want to encourage every local to get their annual audit submitted in a timely manner. As a reminder, the letter that the local president submits now requires two officers to sign off on it. Local delegates that will be attending the AFT Convention in Houston this summer can only be seated if you have your locals audit on file.

The Representative Convention will be coming up at the end of April, please remember that all locals must have 50% of their dues paid in order for their delegates to be seated at our state convention.

Please contact us if you have any questions concerning your audit, treasurer responsibilities or membership rosters. If you need assistance with any aspect of your role, we can provide you with the assistance that you need.

In unity,

## Treasurer Update

**Why are internal controls important?** Internal controls refer to a system of financial checks and balances designed to reduce the possibility of mismanagement of funds, error and fraud. With good internal controls in place, it is difficult for a person with a strong incentive and rationalization to commit fraud.

Here are some examples of how your affiliate can protect the financial resources of your union:

- Make timely deposits.
- Keep detailed records of all transactions.
- Require two signatures for every check written.
- Do not sign blank checks (missing payee and/or amount).
- Have proper supporting documentation for every check written.
- No checks written to "cash."
- Keep the supply of blank checks in a secure place.
- Reconcile your bank statements monthly.
- Establish a budget with projections vs. actual expenditures. Explain any significant variations from budgeted amounts.
- Present complete and accurate financial statements to the governing board on a monthly basis.

**What is on the Education Minnesota website for local treasurers?** The website offers a variety of valuable resources for members and for you as a local leader. For example, under the section on [Local leaders - Treasurers](#), you will find the following resources:

- Treasurers handbook
- Internal audit committee guidelines
- Dues structure
- Dues and stipend survey results
- IRS Information
- Sample forms and policies

*Some content on our website can only be viewed when you're logged in. Please see login instructions below.*

If you have a username, please follow these steps to log into the member portal.

1. Visit the [Education Minnesota website](#).
2. Select the orange "Member Sign In" box (top right).
3. If you have already set up a username and password, enter them and click "Log on."
4. You will be redirected to the Member Portal and the orange box will turn red and display a padlock.

If you haven't registered for [Education Minnesota Member Portal](#) yet, follow the instructions below to register. You will need to enter your member number and select your local.

1. Visit the [Education Minnesota website](#).
2. Select the orange "Member Sign In" box (top right).

3. Enter your member number.
4. Select your local from the drop down list.

If you need your member number or are having difficulty with the site, please [contact Matt Blewett](#) by email or call him at 651-292-4829. Please note that we cannot send user credentials or member numbers by email. Please make sure to send a phone number and good time to call if you inquire by email.

**Have you submitted your affiliates 2018-19 audit report?** If not, you can choose to email the report to [auditreports@edmn.org](mailto:auditreports@edmn.org) or mail the hard copy to:

Education Minnesota  
Attn: Accounting Department/Audit Reports  
41 Sherburne Ave.  
St. Paul, MN 55103-2196

## Membership News

### Education Minnesota Early Enrollment Program

**Who is eligible?** Early enrollment is limited to recruits for the 2020-21 membership year who are either:

1. First-time active members with an employment start date between April 1, 2020, and Aug. 31, 2020.
2. Potential members who have never held an active membership in an NEA affiliated local. To request a list of your local's eligible potential members, please contact your local field office or field staff.

*For all purposes, including membership counts and governance representation, early enrollees are non-members until the membership year begins on Sept. 1, 2020.*

### Why join?

To receive access to an array of member benefits from the organizations listed below beginning April 1, 2020, through Aug. 31, 2020 at no cost.

1. **NEA Educators Employment Liability (EEL) Program** – professional liability insurance
2. **NEA Member Benefits Programs**
  - For a comprehensive look at all the programs and services NEA Member Benefits offers early enrollees, visit [NEA early enrollment member benefits](#)
  - Please note that first-time Active early enrollees **are not** eligible to participate in the NEA Complimentary Life and Introductory Life Insurance programs and the Unified Legal Services Program (ULSP)\* until their memberships are fully activated in September 2020.

*\* Unified Legal Services Program (ULSP) is available before Sept. 1 to first-time active members when their school year work starts before Sept. 1. ULSP covers that member's*

work for the school and continues, after Sept. 1, as part of their regular benefits from the association.

The distinction between when EEL and ULSP becomes a benefit is shown in the continuum below:

| <b>First-time active member</b>                    | <b>April 1</b>         | <b>May</b>             | <b>June</b>            | <b>July</b>            | <b>August</b>                     | <b>Sept., etc.</b>  |
|--|------------------------|------------------------|------------------------|------------------------|-----------------------------------|---------------------|
| <i>April 1 and school year work starts Aug. 15</i> | <i>EEL<br/>No ULSP</i> | <i>EEL<br/>No ULSP</i> | <i>EEL<br/>No ULSP</i> | <i>EEL<br/>No ULSP</i> | <i>EEL<br/>ULSP as of Aug. 15</i> | <i>EEL<br/>ULSP</i> |

### 3. AFT Member Benefit Programs

- For a comprehensive look at all the programs and services AFT Member Benefits offers early enrollees, visit [AFT member benefits](#)
- Please note that first-time Active early enrollees **are not** eligible to participate in the AFT Group Term Life Insurance and Defense Fund until their memberships are fully activated in September 2020.

### 4. Education Minnesota ESI Member Benefit Program.

- For a comprehensive look at all the programs and services [Education Minnesota ESI Member Benefits](#) offers early enrollees.
- Please note that first-time Active early enrollees **are not** eligible to participate in the Identity Theft Recovery Protection Plan until their memberships are fully activated in September 2020.

### How to join?

1. Complete the [2019-20 Education Minnesota Application online](#) or contact your local field office.
2. Complete the [2020-21 Early Enrollment Pledge Form](#).
3. Return both to your [local field office](#).

### Checklist

- Ensure that the employment start date is entered on the application and the pledge form.
- Ensure that the application and the pledge forms are signed and dated.
- Ensure that each membership application has an accompanying early enrollment pledge form.
  - Applications received without the pledge form will be processed as a regular application.
  - Early enrollment pledge forms received without an application cannot be processed and will be returned to the local.

## Upcoming Dates

**March 25** - Transmit state and national dues to Education Minnesota

**April 24-25** - Education Minnesota Representative Convention

Education Minnesota Secretary-Treasurer Rodney Rowe: [rodney.rowe@edmn.org](mailto:rodney.rowe@edmn.org)  
Treasurer/IRS/audit concerns contact, Rose Tuiyott-Lewis: [rose.tuiyott-lewis@edmn.org](mailto:rose.tuiyott-lewis@edmn.org)  
Membership/dues/billing concerns, contact Michelle Johnson: [michelle.johnson@edmn.org](mailto:michelle.johnson@edmn.org)  
Education Minnesota: 1-800-652-9073



Education Minnesota, 41 Sherburne Ave., St. Paul, MN 55103 | 651-227-9541 | 800-652-9073  
Education Minnesota is an affiliate of the American Federation of Teachers,  
National Education Association and AFL-CIO.

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