

From: Rodney Rowe <public.affairs@edmn.org>
Sent: Friday, April 17, 2020 4:28 PM
To: Cooke, Sarah [MN]
Subject: April 2020 Treasurer & Membership Newsletter

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Treasurer and Membership

Newsletter Notes



THE VOICE FOR PROFESSIONAL
EDUCATORS AND STUDENTS

April 2020 issue

Spring greetings!

This certainly is going to be a spring to remember as we all begin to do work in new ways. I hope that this newsletter finds you safe and healthy. I have received several questions regarding audit submissions, transmission of dues payments and membership issues. Our goal in this month's newsletter is to begin to provide you some guidance to help with those tasks. If you need further assistance or have further questions about other items, please reach out to one of us with your specific concern.

This year's Representative Convention will now be a virtual meeting on Saturday, April 25.

We have included in this newsletter information on how your retiring members can enroll in retired membership. There is no additional cost for this membership if the member meets all requirements, but each member must enroll in order to receive it. It would be greatly appreciated if membership contacts could make sure to share this information with those that are retiring from your district this year, so they activate this benefit.

Remember, please contact us when you have questions or need support in your roles as treasurers and membership contacts. We are here to assist, especially in these unprecedented times.

In unity,



Links to sections

- [Treasurer Update](#)
- [Membership Update](#)
- [Upcoming Dates](#)
- [Education Minnesota Retired](#)

Treasurer Update

The following guidelines will be acceptable to use only during COVID-19.

[Audit report has been submitted to Education Minnesota but missing a second officer signature:](#)

The certification letter requires the signatures of the affiliate's principal officer/president and at least one other elected general officer. As treasurer, you can be the second signer. Here are two options:

Option 1: Email confirmation

To: Local treasurer and auditreports@edmn.org

cc: Local president

Subject: ABC Education Association, Local #(1234) - Certification Letter

This email confirms that the audit committee report was presented to the (ABC Education Association) Executive Board on (January 11, 2020). The report has been published and is available to our members.

(ABC Education Association) has filed IRS Form 990-N (e-Postcard).

Sincerely,
Matthew Adams
Vice President, (ABC Education Association)

Option 2: Treasurer sends certification letter to the second officer. The officer will sign, scan and send a copy of the signed letter to the treasurer. The treasurer will send the letter to auditreports@edmn.org.

The treasurer will **print** the certification letter and e-mail for the local records

Audit is complete but has not been presented to the Executive Committee or Membership:

Your local can hold a virtual meeting on Zoom or another virtual platform to make the presentation. If you need access or help with setting up a meeting where you can host a large number of participants, please contact us.

Audit is complete but the audit committee report needs signatures:

Option 1: Treasurer sends a copy of the audit committee report to each of the audit committee members. Each member will sign, scan and send a copy of their signed letter to the treasurer.

Option 2: Each member can create an email like the example below and send the email to the treasurer.

Audit Committee Report

To: Local treasurer

Subject: (ABC Education Association), Local #(1234) - Audit Committee Report

This email confirms my signature to the Audit Committee Report for the examination of the (ABC Education Association) for the fiscal period of September 1, (year) through August 31, (year).

Juanita Rodriguez

Audit Committee Member, (ABC Education Association)

Once all signatures are secured, the completed audit can be scanned and submitted to auditreports@edmn.org.

Audit has not been done:

We are discussing the options available and will communicate potential options for this in the May newsletter.

Second signature for checks

One of the basics of good internal control is that no one person handles all aspects of any financial transaction. The two-signature requirement provides transparency in protecting the union assets.

Begin by checking with your bank to see if your checks will go through with just one signature or if your account requires two signatures. For locals where the bank does require two signatures, see what options the bank has to offer in order to help with that.

If the bank has no options for you, check to see if there would be a way to waive the two signature requirements during this time of social distancing and use the process below to secure a second signature that can be documented.

Here is what we recommend the local to do that would still ensure that more than one member is aware and creates the needed transparency to be able to send checks with just one physical signature on the check:

1. Treasurer sends out an email to all account signers seeking the approval of the payment(s) with one signature. The email will list the details of the check(s): date, check number, payee, amount and purpose.
2. One of the other check signers will create a separate email and responds back to the treasurer and all the other check signers. They also cc two executive board members in on their email. See sample email below.
3. Treasurer **prints** copies of both emails for local records. These emails would then be made available for the fiscal year's audit committee review to validate that a second member was aware of the checks being issued.

Sample language for the response email:

To: Local treasurer
cc: Two Executive Committee members
Subject: Second signature for check

This email confirms my approval and will be considered as the second signature on check number 4321, dated 4/14/20 for \$3,000.00 to Education Minnesota for state and national dues.

Josh Williams
Vice President, (ABC Education Association)

Membership News

Early Enrollment Program update

Education Minnesota's Early Enrollment Program is easier than ever before. No more paper forms. The application and pledge forms are now online. Visit the [early enrollment page](#) for complete details.

Membership rosters

Locals will receive their final 2019-20 membership roster the first week of May. Membership contacts are encouraged to work closely with local treasurers to compare their membership roster, dues deduction report and district data report. This review is critically important to preserve the rights of the members

from whom you are collecting dues and ensures that the local's dues statement is accurate.

The **May roster changes must be received before June 18**, so that the final billing statement in July is accurate. Please contact [Michelle Johnson](#) if your local can't meet the June 18 deadline.

Year-end retirements/resignations/non-renewed/layoffs

If you do not receive retirement, resignation, non-renew and layoff information at the end of this school year, request the information from the district/employer. Payroll deductions continue through the last deduction. Keep in mind that members who pay full deductions are members through Aug. 31. If you have questions, refer to the [cancellation guide](#).

Membership cancellations

Individuals who are no longer with the district are canceled so the local does not continue to be billed for the individual. This [cancellation guide](#) provides cancellation situations and the information needed to process the cancellation and allocate dues appropriately. Education Minnesota CANNOT cancel a membership without all of the relevant information, so please be sure to include ALL of the information without exceptions.

Upcoming Dates

- **April 25** - Education Minnesota Representative Convention
- **May 15** - Locals with a calendar tax year ending Dec. 31 should file form 990, 990-EZ or 990-N (e- Postcard) by May 15.
- **June 18** - May membership roster changes due
- **July 25** - Final dues payment

Retired Membership

Now's the time for members who are retiring from your local to [register](#) for Education Minnesota Retired membership. Retired members help build unity and increase the power of Education Minnesota to represent educators and advocate for stronger public education.

Most members will qualify for retired membership at no additional cost provided they retired after Sept. 1, 2015, are at least age 55 and have been an Education Minnesota member for at least 10 years. Full details can be found on the [Education Minnesota website](#).

Continuing as a member of Education Minnesota in retirement is easy. However, members must [register online](#), preferably before the end of the school year. The

registration link for retired membership can be found at the top of the [Education Minnesota website](#).

Important resources for retirees:

- [Health insurance in retirement](#)
- [Financial services](#)
- [ESI Member Benefits](#)
- [NEA Member Benefits dental and vision insurance](#)
- [NEA Member Benefits](#)
- [AFT Plus Member Benefits](#)

Have your retired or retiring members register today! For questions regarding Education Minnesota Retired membership, contact Stephanie Berg at ESI via email or at 651-292-4877 or 800-642-4624.

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



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