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Treasurer and Membership

Newsletter Notes



THE VOICE FOR PROFESSIONAL
EDUCATORS AND STUDENTS

April 2021 Issue

Spring greetings! I hope that all of you have been able to get outdoors and enjoy the warmer temperatures and the sunshine lately. As a reminder, your local must have remitted at least 50 percent of this year's local dues in order to get your elected delegates sat at this year's Representative Convention. The convention will be held virtually again this year on Saturday, April 24. The field staff and I will be reaching out to locals with additional reminders regarding where your local stands with your current dues payments.

Once again, we have included in this newsletter the information on how your retiring members can enroll in Education Minnesota Retired. There is no additional cost for this membership if the member meets all the 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 and happy to work with you on any of your treasurer or membership duties.

In unity,

Treasurer Update

Are you a new treasurer? If you became a treasurer in the middle of the fiscal year, you might be wondering where to begin. Here are some things that would be helpful to know:

- What is your local's fiscal year? This is the key date for keeping financial records and filing reports.
- What bank accounts does the local have? How many? Are the signatures and addresses updated?
- How much cash is in the bank? Is this reconciled to the checkbook register?
- What are the local, state and national dues?
- Are the dues checks sent to the treasurer or deposited directly to the local's bank account by the school district?
- What is your local's Employer Identification Number (EIN)?
- What reports are you required to file on behalf of your local with the IRS, Education Minnesota, etc.?
- When and how often does your local meet? You need to give a treasurer's report at each meeting.

Please contact [Rose](#) for help or questions.

Does your local have a credit card? If so, adopt a written and board-approved policy to ensure proper use of the card. The policy needs to address authorized users, authorized uses, prohibited uses, expenditures amount limits, documentation requirements and monitoring compliance with the established credit card policies.

[Click here to view the Sample Local Union Credit Card Policy and Use Agreement.](#)

IRS Tax-Exempt Status: Locals recognized as tax exempt by the IRS are classified as labor organizations under Section 501(c)(5). What does this mean for your local?

1. You pay no federal income taxes on income generated from activities related to the purpose for which you were organized.
2. You are required to pay other taxes such as sales tax, payroll tax, etc.
3. You must file the required annual information return--Form 990-N (e-postcard), 990-EZ **or** 990 by the 15th day of the fifth month after the end of the local's fiscal year.
4. You must file other IRS returns that apply to your local i.e., Form 1099-NEC, etc.
5. Donations or contributions to the local are not tax-deductible to the donor.

Membership News

[Early Enrollment Program](#)

Who is eligible?

All potential members, regardless of whether they've been members before, are eligible this year. Education Minnesota was granted a one-time exemption to recruit previous NEA members who may have dropped their membership. This means that every potential member is eligible to participate in the Early Enrollment program this year.

For all purposes, including membership counts and governance

representation, early enrollees are non-members until the membership year begins on Sept. 1, 2021.

How to join?

There are two ways to participate in the Early Enrollment program.

1. Online
 - o Join the [Early Enrollment Program](#) now. This quick, easy form is the recommended method to join.
2. Paper application
 - o Complete, sign and date [the Early Enrollment Pledge Form](#) and the 2020-21 Education Minnesota Application Form.
 - o Attach the Early Enrollment Pledge Form to the 2020-21 Application Form and return both to your field office.
 - o If you need membership applications or pledge forms, email membership@edmn.org. Please include your mailing address and the quantity needed.

Membership Rosters

Locals will receive their final 2020-21 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

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.

April 24:

Education Minnesota Representative Convention

June 18:

May membership roster changes due

July 25:

Final dues payment

Continuous Retired Membership

Important information for members retiring this year.

Retired members help build unity and increase the power of Education Minnesota to represent educators and advocate for stronger public education. Now's the time to encourage the retiring members in your local to [register](#) for Education Minnesota Retired membership. For members who meet the following criteria, there will be no additional cost for this great program.

Eligibility requirements:

1. Retire after Sept. 1, 2015
2. Have been a member of Education Minnesota for at least 10 years (do not have to be consecutive).
3. Eligible to receive a pension retired members will have access to the benefits of retired membership.

Benefits of a retired membership:

- Continued access to Economic Services Inc. (ESI), NEA and AFT member benefit programs.
- Staying connected with other retired colleagues through newsletters, regional events, and annual meetings.
- Participating in Education Minnesota political action and legislative efforts on such important issues as pension benefits and retiree medical insurance.
- Maintaining Educators Employment Liability Insurance (EEL) coverage when teaching as a day-to-day substitute in all public school districts in Minnesota.

And the benefits work both ways. Retired members help Education Minnesota by using their experience in education and their flexible schedules to build power in the union by:

- Volunteering and recruiting other members to engage in Education Minnesota campaign activities.

- Serving as ambassadors for educators and the union with community service groups.
- Covering hearings and lobbying for Education Minnesota's legislative agenda and much more!

Contact Christine Thornborrow, christine.thornborrow@edmn.org, 651-767-1287, 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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