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Treasurer and Membership

Newsletter Notes



THE VOICE FOR PROFESSIONAL
EDUCATORS AND STUDENTS

September 2021 Issue

Fall greetings!

Welcome to both those who are new to their union roles and to those who are returning. As we look ahead to the coming year and the important work you do in your locals, please know that we value you and the work that you do for your local. Once again, this year will bring with it new challenges and our goal is to be here to offer help and guidance whenever you need it. We have a new paper application this year that is now two pages in length that requires the member to initial off on a number of legal aspects in regards to their membership and how the dues are collected. Even under these circumstances, it will be extremely important to find ways to reach out to these new and potential members in your local. Remember to continually monitor your membership changes on a monthly basis by sending in all changes as they occur to your local field office.

New this year, we will be hosting a Zoom meeting on the second Monday of each month from 4-5 p.m. We hosted the first meeting this past Monday on Sept. 13. If you were not able to join us and would like to get the recording of the meeting you can do so by [following this link](#).

Each month, we will touch on one membership topic and one treasurer topic and then open it up for Q&A for the remainder of the time. We hope that you will find these Zoom meetings helpful in getting questions answered along with connecting with your colleagues that do the same work in other locals. The next zoom meeting will be on Monday, Oct. 11.

Contact [Michelle Johnson](#) (membership, dues and billing statement questions), [Rose Tuiyott-Lewis](#) (IRS, audit and other compliance-related questions) or me with any questions you have throughout the year. Our goal is to provide you with help and assistance with any of your treasurer or membership tasks that arise throughout the year. Never hesitate to contact us with any of your questions. I look forward to meeting or talking with each of you when the opportunity allows for us to meet at events over this coming academic year.

In unity,

Treasurer Update

Getting started in the new fiscal year? To help you comply with your role responsibilities, here are some suggestions:

Local calendar: [Establish a calendar](#) based on your local activities and fiscal year. It helps you plan what needs to be done throughout each month, at the end of each month, at the end of the fiscal year and at the end of the calendar year.

Local budget: Adopt the approved local budget. The budget should be an integral part of your monthly financial report. The report should compare your actual income and expenses to the budget.

Local policies: If your local does not have policies, discuss, develop and adopt written policies regarding financial operating policies, conflict of interest, record retention and credit card guidelines (if applicable).

Record keeping: Create a new file(s) or folder(s) for the fiscal year that will contain the following documents:

- Approved budget
- Deposit receipts
- Bank statements and monthly bank reconciliations
- Supporting documents i.e. invoices, expense reimbursement forms, receipts
- Treasurer reports/financial statements
- Tax returns
- Meeting minutes that include budget approval, budget amendments or authorized expenditures not in the budget

Accounting system: Use a system that will at the very least allow you to:

- Record all transactions in sufficient detail
- Provide accurate information
- Print and customize financial reports easily
- Provide records that others can follow

Audit: Prepare for the annual audit for the fiscal year that just ended. Plan to have the audit completed and presented at a specified meeting of the local's governing body and published and made available to membership within six months of the close of the fiscal year.

Tax returns: Prepare to file electronically the annual IRS [Form 990-N \(e-postcard\)](#), [Form 990-EZ](#) or [Form 990](#). If filing Form 990-N (e-postcard), follow the instructions outlined in the [User Guide](#). The return is due on the 15th day of the 5th month after the fiscal year has ended.

Membership News

Who became a member using Join Now?

Membership contacts will receive an email notification for each individual who completes a Join Now membership application. The subject of the email is, "Thank You for Being a Member of Your Union!"

If you did not receive a notification:

- Contact your support staff and ask them to verify your role email address.
- Check your junk or spam folder.
- If you use a district email as your role email, it could be blocked by the district's server. Contact your district IT department for assistance.
- If the district has blocked the emails, you'll need to change to a non-district email.

Contact your field office support staff if you would like a list of individuals who completed Join Now applications for your local.

Yes, Join Now electronic membership applications are valid!

Electronic signatures can be used to authorize membership in, and payment commitments owing to Education Minnesota, its local affiliates, and the National Education Association and American Federation of Teachers. The federal Electronic Signatures in Global and National Commerce (ESIGN) Act, 15 U.S.C. § 7001 et seq., facilitates the use of electronic records and electronic authorizations in interstate and foreign commerce. It provides that “(1) a signature, contract, or other record relating to [any] ... transaction [in or affecting interstate or foreign commerce] may not be denied legal effect, validity, or enforceability solely because it is in electronic form; and (2) a contract relating to such transaction may not be denied legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation.” 15 U.S.C.A. § 7001(a).

At the state level, 48 states have adopted the Uniform Electronic Transactions Act (“UETA”) (Illinois and New York also have unique laws that recognize the enforceability of electronic signatures), which served as a model for states to likewise which, like the ESIGN Act, established the principle that a signature or contract cannot be denied legal effect or enforceability simply because it is electronic.

Minnesota’s Uniform Electronic Transactions Act is no different, providing the following:

A record or signature may not be denied legal effect or enforceability solely because it is in electronic form.

- A contract may not be denied legal effect or enforceability solely because an electronic record was used in its formation.
- If a law requires a record to be in writing, an electronic record satisfies the law.
- If a law requires a signature, an electronic signature satisfies the law.

Minn. Stat. Ann. § 325L.07. An electronic signature is defined broadly to include “an electronic sound, symbol, or process attached to or logically associated with a record and executed or adopted by a person with the intent to sign the record.” Minn. Stat. Ann. § 325L.02.

When a member joins Education Minnesota through the Join Now process, the member receives an email confirming the terms that they agreed to in order to secure the benefits of membership. That includes the amount of dues, and if elected the member’s agreement to pay dues through payroll deduction: “I authorize [school district] to deduct from my pay in each pay period a pro rata portion of the annual dues, fees and assessments required for membership in the [Local], the Education Minnesota, and the National Education Association, and American Federation of Teachers.” That confirmation is only generated if the member completes and submits the online agreement. Under the UETA, as adopted by Minnesota, that is sufficient to establish a member agreement every bit as valid as if the member applied a wet signature to a paper copy of Education Minnesota’s membership agreement. A school district may not impose additional requirements simply because the agreement is electronic.

Locals do not need to print out the Join Now applications. They can email the file to the requesting district and the district can maintain it electronically. Contact your field staff if have any questions.

How to determine the membership level for a long-term substitute

ESP – Use this formula – individual’s paid work days x hours per day x hourly rate of pay

Example: A long term sub is replacing an ESP who is out from Oct.1–Dec.15 (55 paid work days):

$$(55 \times 6 \times \$10.00) = \$3,300.00$$

Teacher/faculty – Use this formula – (individual's paid work days/position work days) * position FTE in the employing District.

Example 1: Long term sub is a 1.0 FTE in a district and is replacing a teacher who is out for the entire school year (185 paid work days): $(185/185) * 1 = 1.0$. Their state membership code is AC-1-100 - teach greater than 90% to 100%.

Example 2: Long term sub is a 1.0 FTE in a district and is replacing a teacher who is out for three months (60 paid work days): $(60/185) * 1 = 0.32$. Their state membership code is AC-1-40 - teach greater than 25% to 40%.

Example 3: Long term sub is a 0.5 FTE in a district and is replacing a teacher who is out for five months (100 paid work days): $(100/185) * 0.5 = 0.27$. Their state membership code is AC-1-40 - teach greater than 25% to 40%.

How to determine the dues obligation for existing potential members or individuals who are hired mid-year and choose to become active members.

ESP – [This chart](#) contains the combined national and state dues obligations for each ESP membership type. Use this chart after Sept. 30, 2021 to determine the national and state dues obligation for existing potential members or individuals who are hired mid-year and choose to become active members.

Teacher/faculty – [This chart](#) contains the combined national and state dues obligations for each teacher/faculty membership type. Use this chart after Sept. 30, 2021 to determine the national and state dues obligation for existing potential members or individuals who are hired mid-year and choose to become active members.

Online resources

Education Minnesota's website offers you valuable resources as treasurer or membership contact. Under the section on local leaders, you will find the following resources available for your reference.

- [Treasurer's handbook](#)
- [Internal audit committee guidelines](#)
- [IRS information](#)
- [Membership handouts](#)
- [Teacher/faculty payroll deduction spreadsheet](#)
- Sample [forms](#) and [policies](#)
- [Dues structure](#)
- [ESI benefits handout](#)
- [Membership materials ordering link](#)
- [ESP payroll deduction spreadsheet](#)

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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