

TREASURER AND MEMBERSHIP

Newsletter Notes



THE VOICE FOR PROFESSIONAL
EDUCATORS AND STUDENTS



Blustery, cold winter greetings!

On the bright side, spring is only about 35 days away! At this time of the year local treasurers and membership contacts should be focusing on finalizing and submitting their local audits, reaching out and having conversations with anyone in your local that is a potential member, checking payroll dues deductions for accuracy and beginning the process of preparing information for next year's budget proposal.

If you need to train your internal audit committee members on how to conduct an internal audit, please let us know as we would be more than happy to offer the Scope It Out training.

All of these tasks take a great amount of time and I cannot thank you enough for serving as your local treasurer and membership contact.

In unity,

Treasurer Update

Audit reports: We have received a number of audit reports for the period 2017-18 and look forward to receiving the rest in the near future. Thank you for the work you have done or are about to do!

Affiliates now have two options to submit audit reports. You can choose to email the report or mail hard copies to Education Minnesota.

Email:

Scan and save your report as a pdf document and send to auditreports@edmn.org. Please ensure that all copies are legible.

Mail to:

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

Incomplete audit reports:

Copies of all affiliate audit reports are submitted to the American Federation of Teachers (AFT). We are in the process of reviewing and submitting 2017-18 audit reports. In order to avoid delays, please ensure that you have submitted a complete audit report. Audit report requirements were addressed in the January newsletter. You can view a [sample report here](#).

The following list provides examples of incomplete audit reports:

- Copy of the check/transaction register instead of financial statements
- Copies of bank statements instead of financial statements
- Unsigned president's letter
- President's letter that does not include the specific meeting date when the audit was presented to the executive board or general membership
- Unsigned internal audit committee report
- Audit which covers a period of less than 12 months (except for a new local or local changing the fiscal year)

Rose will be working with [Shirley Roeber](#) who is assisting with affiliate audits. Shirley may contact you for additional information.

How are you doing as the local treasurer? Below are some quick questions to ask:

- Do you require adequate documentation for all expenses?
- Does your local use an expense reimbursement form?
- Do you reconcile your bank statement(s) monthly?
- Is your local current on state and national dues payments?
- Do you prepare and present complete and accurate financial statements to the governing/executive board?
- Have you completed and submitted your annual audit?
- Have you filed required returns to the Internal Revenue Service?

Steps for success in your role as treasurer include understanding what needs to be done throughout each month, at the end of each month and at the end of each fiscal year.

Membership News

Membership roster

The second membership roster will be emailed to you within the next week. It is the membership contact's responsibility to review the local's roster to make certain that all individuals have been added, deleted or changed, as appropriate. This review is critically important to preserve the rights of members from whom your local collects dues. In addition, the local roster generates the dues billing statement, so it is important that all changes have been made to ensure the local is billed accurately.

When you review your local's roster, make certain that:

- Each individual's membership level is correct.
- Individuals no longer with the district are canceled.
- Compare the payroll dues deduction report and roster so nobody is missing from the roster.
- Those who elected not to join as active members are listed on the roster as potential members.
- All membership changes are emailed to membership@edmn.org.

Drop vs. Cancellation

Drop means an individual no longer wants to be a member. Membership drop requests are

emailed to memberdrop@edmn.org.

Cancellation means an individual is no longer eligible to be a member because they resigned, retired or were terminated.

Please note: *The definitions of membership drop and cancellation are NOT interchangeable.*

Cancellations

We have received numerous cancellations that are missing information. All cancellation requests must include: cancel date, the reason and the amount of national and state dues collected. Refer to the [membership contact handbook](#), beginning on page 64, for the cancellation procedures and the dues collected calculation. Email your changes to membership@edmn.org.

New hires after start of school year

Teacher/Faculty - Verify that the FTE provided by the district/employer is based on the members paid work days and not the position work days.

Individual's paid work days = the number of paid days.

Example: Oct. 1–Dec. 15 = 55 paid days

Position work days = the number of days for that position for the entire year.

Example: Aug. 28–June 10 = 185 contract days

If the member's FTE is based on the position work days, the FTE will need to be recalculated using the formula located on page 17 of the [handbook](#). The FTE recalculation is for dues purposes only.

ESP: Verify that the salary provided by the district/employer is based on the member's paid work days and that it does not include non-bargaining unit work. If the member's salary is based on the position work days and/or it includes non-bargaining unit work, the salary will need to be recalculated using only the member's paid work days. The recalculation is for dues purposes only.

Potential members

Individuals who elect not to become active members are still members of the bargaining unit and should be listed on the roster. Potential teacher/faculty are listed with the state membership type PM-1-0.

Potential ESPs are listed with the state membership type PM-2-0.

Potential Members are added to the roster by emailing membership@edmn.org. Include their first name, last name, address, work location, position, subject and employment start date for this position.

Tier 1 license

Teachers who hold only a Tier 1 license or those who are currently hired as community experts are not eligible for membership of the licensed teacher bargaining unit.

If a person was hired on a Tier 1 (formerly a variance) but also holds a Tier 2, Tier 3, or Tier 4 or an extended limited license from last year, they are eligible for the licensed teacher bargaining unit by virtue of those other licenses.

Contact your field staff with questions about licensure and bargaining unit eligibility.

Upcoming Dates

Feb. 15: 40 percent dues obligation should be paid.

Apr. 26-27: Education Minnesota Representative Convention.

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 statement concerns contact Michelle Johnson: 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
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