

Treasurer and Membership

Newsletter Notes



May 2021 Issue

Spring has clearly made its presence and the end of the school year is quickly approaching. If you have not yet submitted your annual audit report(s) please do so before you leave your buildings. We recently sent out letters as reminders for those that we do not have an audit on file for yet, along with any other years that we do not have an audit on file for as well. With the pandemic, we are behind in getting local audit reports submitted and we appreciate the extra work required to get these caught up.

Registration for Summer Seminar will be coming to the Education Minnesota website soon. This is a great opportunity to get union led professional development. I would like to encourage all treasurers and membership contacts to attend the virtual training sessions that we will be holding for these two role alike groups. The virtual training sessions will take place on Aug. 3 and 4.

Once again, this month we are attaching continuous retired membership information and would appreciate it if you would share this information with anyone in your district who is retiring and encourage them to activate their retiree membership. As a reminder, there is no additional cost for this membership if they meet the eligibility requirements, but each member must enroll so that they will receive the benefits from it.

For those of you that will be ending your year in May, I hope you have an enjoyable and restful summer. As a reminder, please remember to submit your June and July dues payments in a timely manner.

In unity,

Treasurer Update

Final Dues Payment

[The billing statement guide](#) explains how the statements are calculated. It also provides the amount owed if you choose to pay June and July payments early. Note: If there are subsequent roster changes the amount due will change accordingly.

Summer Seminar: We plan on offering two treasurer sessions. If you are *new* to your role or *have not* attended one of our trainings in the past, please consider joining us.

Financial and Fiduciary Responsibilities for Local Leaders: This session will provide information on fiduciary responsibilities and financial training for treasurers, local, and intermediate organization leaders.

Local Treasurer's Forum: In this forum, a panel of experts will be available to answer your questions and offer advice.

Tax Exempt Organization Search: This online tool is designed to provide easier access to publicly available information about exempt organizations.

Example: Here is how you can use the tool to find out if the local has filed Form 990-N (e-Postcard):

1. Click on this [link](#).
2. Search by the Employer Identification Number (easier) or Organization Name.
3. Click on Search.
4. Click on the local name. The page will display all the returns filed by the local.

Audit Report Reminder: Before submitting your report, please ensure that you have included the documents listed below:

- Statement signed by the local's president **and** one other elected general officer certifying the audit has been presented at a specified meeting (date required) of the local's governing body and published and made available to the members.
- Internal Audit Committee report signed by committee members to show that all concur with the report.
- Statement of Financial Position (Balance Sheet).
- Statement of Activities (Income and Expenses).

Locals with fewer than 50 members can choose to submit a one-page financial report instead of the Statement of Financial Position or Statement of Activities.

See sample audit reports on pages 21-28 of the [Internal Audit Committee Guidelines](#) handbook.

Membership News

Membership Rosters

Locals will receive their final 2020-21 membership roster in 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.

Thank you for your commitment in working to provide this information. Your efforts and attention to detail are greatly appreciated. If you have not received the May roster, please check your junk or spam folder. If it is not there, contact your local field office assistant for assistance.

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.

Year-end Retirements/Resignations/Non-renewed/Layoffs

If you do not receive retirement, resignation, non-renew and/or layoff information at the end of this school year, you can request the information from your 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](#).

Please notify your local retirees that they may be eligible for free retired membership if they meet the eligibility requirements. See the bottom of this e-newsletter for details.

2021-22 Membership Materials: The [materials ordering link](#) is now active so that you can order your membership materials for next year. Materials will begin shipping out in late July and early August. The online membership application ([Join Now](#)) is the preferred method of signing up new members so they are entered into the system the easiest and fastest way, but paper applications are still available through the online ordering site. As a reminder, when ordering your membership materials you do not log in with your personal login credentials. When ordering your membership materials, your User ID and password are your local number. Should you have any questions or issues with ordering please contact Bob Lorence at bob.lorence@edmn.org.

Upcoming Dates

June 15 All local membership roster changes and/or additions are due no later than June 15.

Aug. 3 - 4 [Summer Seminar](#): We will be offering training for both new and experienced treasurers and membership contacts.

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

