



Treasurer and Membership

Newsletter Notes



Fall greetings!

Thanks for all the extra work you have done this fall in getting your new educators signed up to be members of Education Minnesota and working through all the new procedures for members that wanted to drop and submitting your roster changes.

A couple of key reminders that we need each of you to stay on top of as we go through the year.

1) Roster Changes:

Membership contacts will now email all membership changes to membership@edmn.org as soon as they occur. Following this new procedure will ensure that the local is billed correctly, all changes were received and processed, the membership roster is always up to date, and individual's membership records are accurate.

2) Potential Members:

Individuals who elected not to become active members are still members of the bargaining unit. They are listed on the roster as potential members. There are two state potential member membership types – Teacher/Faculty are PM-1-0 and ESPs are PM-2-0. Former fair-share fee payers are now shown as potential members. Add all potential members by emailing membership@edmn.org: with their first and last name, address, work location, position and subject.

When sending these in, it would be most helpful when you state your full local name in the subject line that you spell out your full local name rather than typing an acronym. Example: Rather than typing MTA, please type Mankato Teachers Association.

Your role in this process is critical, as 90 percent of Education Minnesota's revenue comes from having accurate membership counts and correct dues amounts being processed for our members.

I hope to see some of you this month at MEA. MEA is a great opportunity to get union led professional development and network with colleagues statewide.



Treasurer update

Financial reports: Preparation and distribution of a written monthly financial report is an important part of the treasurer's duties. These reports inform your governing body of the financial status of your affiliate. During the year, a statement of activities noting the actual income and expenses to-date should be compared to the budget. A copy of the report is filed with the meeting minutes.

Getting ready for your annual audit? A majority of local's with fewer than 1,000 members appoint an internal audit committee of three to five members to review the financial records and submit a report. The internal audit committee guidelines handbook, available online, provides a step-by-step process to be followed. Log in as a member and click on the Local Leaders section to access the book.

Listed below are examples of questions that the review will address:

Cash receipts (income):

- Were the receipts properly deposited into the bank account?
- Were the correct amounts deposited based on supporting documentation?
- Were the receipts properly recorded?

Cash disbursements (expenses):

- Were the disbursements properly authorized? Is there supporting documentation?
- Were the checks prepared with the accurate payee(s) and amount and recorded timely?
- Were the checks signed by authorized signatories?

Bank reconciliations:

- Were the bank reconciliations prepared monthly?
- Is there proper support for the reconciling items, if any, between the bank statements and the check/book balances?

Treasurer's reports:

- Are the bank balances, cash receipts and cash disbursement activities accurately reflected in the treasurer's reports?
- Do the reports compare the actual income and expenses to the budget?
- Are the treasurer's reports presented at each meeting?

Membership news

Dues obligations for individuals who join or are hired mid-year: Select the applicable obligation chart - [ESP](#) or [teacher/faculty](#). Each chart contains the annual national and state dues obligations for each membership type. The charts are used to determine the dues obligation for potential members who elect to become active members or for individuals hired mid-year and elect to become active members.

Membership roster change reminders: Please make sure to include the information needed for us to process your roster changes. For example, removing someone from the roster – include their name, cancel reason and the amount of national and state dues collected. Refer to the handbook for all roster change procedures.

2017-18 individuals who joined or were hired mid-year: Make sure they are listed in the correct membership level. Their membership level may be different this year.

What is the definition of a long-term substitute (LTS) teacher/faculty? Are they members of the bargaining unit and assessed dues? A teacher/faculty member employed as LTS for an absent teacher/faculty member for more than 30 working days are members of the bargaining unit.

Teacher/faculty employed as a LTS are members of the bargaining unit as soon as the employer knows that the position they are working in has or will exist for more than 30 days. They are eligible to join as active members at that time, or when they work more than 30 days, whichever is sooner.

For example, a LTS teacher/faculty whose assignment is 35 days is in the bargaining unit on day one.

A LTS teacher/faculty whose original assignment is 20 days, but was extended to 40 days on day 19, is in the bargaining unit on day 19.

In either case, the entire assignment must be to replace the same absent teacher. A LTS is assessed dues based on the FTE for their LTS assignment.

What is the definition of a long-term substitute (LTS) ESP? Are they members of the bargaining unit and assessed dues? ESPs employed as LTS are members of the bargaining unit as soon as the employer knows that the position they are working in has or will exist for more than 67 days. They are eligible to join as active members at that time or when they work more than 67 days, whichever is sooner.

For example, a LTS ESP who is employed to cover a permanent ESP, who is out on leave or will be out on leave for more than 67 days, is in the bargaining unit on day one.

A LTS is assessed dues based on salary earned for their LTS assignment.

Membership ID Number: A membership ID number is the unique 10-digit individual identification number assigned to each member. This number appears on the Education Minnesota Membership Card which also serves as the AFT and NEA membership card. This member number is used to register on the Education Minnesota website, www.educationminnesota.org, providing access to the members-only sections. The number is also located on each membership roster under Indv Id.

Upcoming dates

Nov. 15: IRS Form 990, 990-EZ, or 990-N (e-Postcard) is due for affiliates with a fiscal year ending June 30.

Education Minnesota Secretary-Treasurer: Rodney Rower 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

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