

Cooke, Sarah [MN]

From: Rodney Rowe <rodneyrowe@email.nea.org>
Sent: Thursday, November 4, 2021 12:59 PM
To: Cooke, Sarah [MN]
Subject: November 2021 Treasurer and Membership Newsletter

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Treasurer and Membership

Newsletter Notes



THE VOICE FOR PROFESSIONAL
EDUCATORS AND STUDENTS

November 2021

Crisp fall greetings!

As our thoughts turn toward Thanksgiving, we are so thankful for your leadership in being treasurers and membership contacts. Your efforts in maintaining accurate membership rosters, reconciling bank accounts, and reporting current financials to your affiliate make a difference in making sure your local remains strong.

Looking forward to seeing many of on the monthly call this coming Monday, Nov. 8 at 4 pm. The topics for this call are:

- Membership: Roster Updates
- Treasurer: Affiliate Audits

As you prepare for upcoming tasks such as conducting your audit, monitoring payroll deductions, signing up mid-year hires and filing IRS forms, please feel free to contact us if you need any help or support. One very important reminder for all locals in regard to submitting your audits.

- The audit's president letter must be signed by the president **and at least one other elected general officer**.

Thank you to all those who have already submitted your affiliate's audit report. **If the certification letter had only the president's signature, we request that you send us the letter with two signatures.** Copies of all audit reports are submitted to American Federation of Teachers. If you have any questions or need to train your

internal audit committee members on how to conduct an internal audit, please let us know and we will be happy to offer the training.

In unity,



Treasurer Update

Audit report reminders: Before sending your affiliate's audit report, please review the questions below. If you answered yes to all the questions, you are ready to submit your affiliate's audit report.

1. Has the presidents/certification letter been signed by the affiliate president **and** one other elected officer?
2. Does the presidents/certification letter state the **specific meeting date** when the audit report was presented to your affiliates governing board **or** general membership, published and made available to members?
3. Does the audit period represent 12 consecutive months?
4. Has your affiliate filed the required Form 990-N (e-Postcard), 990-EZ or 990?
5. If your affiliate gross receipts are normally \$50,000 or less, have you included the 990-N (e-Postcard) filing confirmation?
6. Have all the audit committee members signed the internal audit committee report?
7. Have you attached a copy of the Statement of Financial Position (Balance Sheet) and Statement of Activities (Income and Expenses) or Financial Report (option for locals with fewer than 50 members)? You do not need to send copies of the bank statements or check/transaction register. Sample audit reports are found on pages 39-46 of the 2019 Treasurer's Handbook.

Affiliates 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

IRS Form 1099-NEC Reminder: Issue Form 1099-NEC by Jan. 31, 2022 to any individual receiving \$600 or more from the local during the calendar year (January –

December). Ensure that you have individual information needed to complete the form(s). Examples:

Q. The local received a Local Time Enhancement grant for the 2020-21 school year which was used to fund stipends. Does the treasurer need to file Form 1099-NEC?

A. Yes, for all members whose total remuneration is \$600 or more in the calendar year.

Q. The local pays the president a \$599 stipend. Does the treasurer need to file Form 1099-NEC?

A. No. The total remuneration is \$599.

Q. The local pays the vice president a \$250 stipend, \$300 for participating on the negotiations committee and \$50 reimbursement for properly-documented expenses. Does the treasurer need to file Form 1099-NEC?

A. No. The total remuneration is \$550.

Q. The local receives a check for \$2,850 for a member who is a recipient of a classroom technology grant. The check is from Education Minnesota Foundation for Excellence in Teaching and Learning and the local is the fiscal agent. Does the treasurer need to file Form 1099-NEC?

A. No.

Now is a good time to place your order for delivery via the U.S. Postal Service by calling 1-800-TAX-FORM (1-800-829-3676) or submit your [request online](#).

Membership News

Dues Payments

If you would like to receive prepaid envelopes to the dues lockbox, send an email to membership@edmn.org, write lockbox envelopes and your locals name in the subject and provide your name and mailing address in the body of the email.

Roster Changes

Please continue to send in your roster changes as they occur. This will ensure that your local's statement is accurate.

Upcoming Dates

Nov.1: Return membership roster, applications and potential member forms to:

Education Minnesota
Membership Department
41 Sherburne Avenue
St. Paul, MN 55103.

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 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



Education Minnesota, 41 Sherburne Ave., St. Paul, MN 55103 | 651-227-9541 | 800-652-9073
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