

## Cooke, Sarah [MN]

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**From:** Rodney Rowe <rodneyrowe@email.nea.org>  
**Sent:** Friday, May 6, 2022 1:28 PM  
**To:** Cooke, Sarah [MN]  
**Subject:** May 2022 Treasurer and Membership Newsletter

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# Treasurer and Membership

*Newsletter Notes*



THE VOICE FOR PROFESSIONAL  
EDUCATORS AND STUDENTS

## May 2022 Issue

The sun has finally started to feel a bit warmer these past few days and I hope you are finding some time to get outside. If you have not yet submitted your annual audit report(s), please do so before you leave your buildings. We are in the process of sending out reminder letters to the locals that do not have their 2020-21 audit report on file. Please remember that if your local is sending delegates to the AFT Convention this summer, your 2020-21 local audit report must be received by June 10. Locals missing previous years' audit reports will be getting notification letters as well.

Our next monthly call is this coming Monday, May 9 at 4 p.m. The topics for this month's call are:

- **Membership:** Retired membership
- **Treasurer:** Local policies

Registration for Summer Seminar will open soon on the Education Minnesota website. This is a wonderful opportunity to get union-led professional development. I would like to encourage all treasurers and membership contacts to attend the training sessions that we will be holding for these two role-like groups. Summer Seminar training sessions will take place Aug. 1-3.

**Ordering membership materials for next year has now begun, but please note that no materials will be shipped out to any local until July!**

If you have not yet ordered materials for members for next year, you can do so by placing your order here <https://membershipmaterials.myprintdesk.net/>. Please remember that when log in on this site, **your username and password are your**

**local number.** (Example: Anoka's local number is 7007, you would use that as both the username and password.)

If you are not certain of your local number, you can [look that up here](#).

Once again, we are including information about continuous retired membership this month and would appreciate you sharing this information with anyone in your district that is retiring and encourage them to activate their retiree membership. As a reminder, there is no additional cost for this membership if they meet 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 final roster changes no later than June 15 so that your final July bill is correct. Your local will still have billing statements in both June and July, so please make sure to submit those dues payments in a timely manner even though it is summer!

In unity,



## Treasurer Update

**Summer Seminar:** We plan on offering three treasurer training 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.
- **Internal Audit Committee Training:** We will take you step-by-step through the internal financial review process. This session will be beneficial for your internal audit committee members.
- **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 your 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.

**Treasurer's Handbook reminder:** If you have suggestions or ideas on how we can improve the handbook, please [contact Rose](#).

## Membership News

### Membership rosters

Locals will receive their final 2021-22 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 **final roster changes must be received by June 15**. Remember, the obligation amounts listed on the roster are used to calculate the amount of the dues billed on your monthly statements. The final statement is generated on July 1 and the final dues payment is due on July 25. If you have questions in regard to final roster changes, [contact Michelle Johnson](#).

### Year-end retirements/resignations/non-renewed/layoffs

If you do not receive retirement, resignation, non-renew and layoff information at the end of this school year, request the information from the district/employer. It is very important to submit all year-end membership cancellations now. By doing so, you will start the next membership year with an accurate roster and have fewer changes to make at the busiest time of the year.

Keep in mind that members who pay full deductions are members through Aug. 31.

### Retired membership

Please notify your local retirees that they may be eligible for [retired membership](#). There is no cost for this membership if eligibility requirements are met. See the bottom of this email for details.

## Upcoming Dates

**May 15:** Locals with a calendar tax year ending Dec. 31 should file form 990, 990-EZ or 990-N (e- Postcard) by May 15.

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

**Aug. 1-3:** Summer Seminar – we will be offering training for both new and experienced treasurers and membership contacts.

## 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 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.

**Benefits of 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](#) by email or 651-767-1287, 800-642-4624.

Education Minnesota Secretary-Treasurer Rodney Rowe: [rodney.rowe@edmn.org](mailto:rodney.rowe@edmn.org)  
Treasurer/IRS/audit concerns contact Rose Tuiyott-Lewis: [rose.tuiyott-lewis@edmn.org](mailto:rose.tuiyott-lewis@edmn.org)  
Membership/dues/billing concerns contact Michelle Johnson: [michelle.johnson@edmn.org](mailto: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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