

**From:** Rodney Rowe <rodneyrowe@email.nea.org>  
**Sent:** Thursday, March 10, 2022 2:33 PM  
**To:** Cooke, Sarah [MN]  
**Subject:** March 2022 Treasurer and Membership Newsletter

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# Treasurer and Membership

*Newsletter Notes*



THE VOICE FOR PROFESSIONAL  
EDUCATORS AND STUDENTS

## March 2022 Issue

I am sure that many of you, like me, are ready for warmer days and more signs of spring to arrive. As we head into March, I want to encourage every local to get their annual audit submitted in a timely manner. Any locals that have delegates going to the AFT Convention this summer will need to have their current audit on file in order to have the local delegates sat at the convention. As a reminder, the letter that the local president submits now requires two officers to sign off on it.

Looking forward to seeing many of you on the monthly call at 4 p.m. this coming Monday, March 14. The topics for this month's call are:

**Membership:** Accessing the Billing Portal

**Treasurer:** Organizing for Settlement Funds

The Representative Convention is coming up on April 22-23. Please remember that all locals must have 55% of their dues paid by March 25 in order for their delegates to be seated at our state representative convention.

Please contact us if you have any questions concerning your audit, treasurer responsibilities or membership rosters. If you need assistance with any aspect of your role, we can provide you with the assistance that you need.

In unity,

## Treasurer Update

**Outstanding Organizing for Settlement Fund loans:** Locals who have received an Organizing for Settlement Fund loan must return any unused funds, as well as submit a financial report detailing all expenditures, within 60 days of their contract ratification. Expenditure reports need to be supported with photocopies of original, itemized receipts and sign-in sheets and rosters. These items should be emailed to [Janel Engesser](#) or mailed to:

Education Minnesota Organizing for Settlement Fund  
41 Sherburne Ave.  
St. Paul, MN 55103

If you have any questions, please contact your field staff or [Janel Engesser](#).

**Why are internal controls important?** Internal controls refer to a system of financial checks and balances designed to reduce the possibility of mismanagement of funds, error and fraud. With good internal controls in place, it is difficult for a person with a strong incentive and rationalization to commit fraud.

Here are some examples of how your affiliate can protect the financial resources of your union:

- Make timely deposits.
- Keep detailed records of all transactions.
- Require two signatures for every check written.
- Do not sign blank checks (missing payee and/or amount).
- Have proper supporting documentation for every check written.
- No checks written to “cash.”
- Keep the supply of blank checks in a secure place.
- Reconcile your bank statements monthly.
- Establish a budget with projections vs. actual expenditures. Explain any significant variations from budgeted amounts.
- Present complete and accurate financial statements to the governing board on a monthly basis.

### Reminders:

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

**2020-21 Audit Reports are due:** Please send the complete report to [auditreports@edmn.org](mailto:auditreports@edmn.org).

## Membership News

### 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 is 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:**

- Retire after September 1, 2015.
- Have been a member of Education Minnesota for at least 10 years (does not have to be consecutive).
- 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](#) by email at [christine.thornborrow@edmn.org](mailto:christine.thornborrow@edmn.org) or by phone at 651-767-1287, 800-642-4624.

## Upcoming Dates

**March 25:** 55% of your local's dues obligation must be paid to Education Minnesota in order to seat your local delegates at the 2022 Representative Convention.

**April 22-23:** Education Minnesota Representative Convention

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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