

# OEA MEMBERSHIP DEPARTMENT

## 2018-2019

### Monthly Membership Guide & Updates For Local Association Leaders

June 30, 2019

- Enclosed is the monthly billing statement for the month of June 2019.
- Also enclosed is the annual Dues Transmittal Agreement which is to be updated and returned before September 30, 2019. Your monthly billing statements are based on this information. Please take a moment to review and provide the requested information for the new 2019-2020 membership year.
- **IMPORTANT: Membership enrollment materials for the 2019-2020 Membership Year were mailed June 18th.** The materials were mailed to the home address of the Treasurer on record. The Enrollment and Renewal Forms were sent to the Treasurer of record directly from our print vendor. All other membership enrollment materials were sent directly from OEA. This means the Treasurer should have received two separate mailings for the 2019-2020 membership enrollment materials. If there has been a change in the Local Treasurer and that information was not provided to OEA it will be necessary for the prior Treasurer to make arrangements to confirm the new Treasurer receives these materials.
- **Reminders for this year:** Both Enrollment and Renewal Membership forms require 2 signatures for members. All forms are to be mailed back to OEA.
- **Fundraising materials for the OEA/NEA Fund for Children & Public Education (FCPE)** will arrive separately from all other materials. They will be shipped directly to the local association president. You may want to share this information with the other officers in your local.
- Please continue to report any new election results to your OEA field office with name, address, non-work phone number and a non-work e-mail address prior to the end of July. Advising your OEA Field Office immediately of any change to your local leadership along with providing a non-work e-mail address and a non-work phone number for all local leaders helps support OEA's efforts in timely communication.
- The **2019-2020 Dues Rates** have been posted to the OEA Website at [www.ohea.org/resources/Secretary-Treasurer's office](http://www.ohea.org/resources/Secretary-Treasurer's%20office).

#### July Due Date Reminders:

- **27th—Dues payment to OEA.** (Remember to include your local's 4-digit ID number on your check payments.)
- Update and return the Dues Transmittal Agreement.
- Office closed July 4th

#### OEA Office Summer Hours:

8:15 AM – 4:30 PM

From 6/1/2019 - 8/31/2019

Contact Center InfoOEA remains  
8:30 AM—6:00 PM

#### **Some items to put on your "to-do" list as the 18-19 year comes to a close.**

- **Membership Reconciliations**—Reconcile your membership with OEA and your employer. See "Reconciliation of Local Association Members" in the Treasurer's Handbook for details.
- **Timely Payments**—Check your billing statement and dues transmittal agreement schedule and bring all outstanding dues payments current.
- **Local Association Leader Updates**—Send all changes to your OEA field office.

#### **...And if you are an outgoing Treasurer:**

- ⇒ Review Duties and Responsibilities (Treasurer's duties should be outlined in your local's constitution and bylaws. Additional guidelines can be found in the OEA Treasurer's Handbook in the yellow section.)
- ⇒ Forward the Treasurer's Handbook with any notations you have made
- ⇒ Discuss Bank Account Signature and Access Changes
- ⇒ Review budget
- ⇒ Complete Change of Address for: Bank, School District and IRS.
- ⇒ Attend an OEA Treasurer's Workshop together.
- ⇒ Make sure mailed materials get to the appropriate individual.



Thanks for your continued efforts and support.

If you have questions or concerns please contact us by e-mail:  
[membership@ohea.org](mailto:membership@ohea.org)

Or by telephone: InfoOEA  
(844) 632-4636

\*All enclosures are sent to the local treasurer. This mailing to other officers is for informational purposes only.

## What are all these forms and how are they used by OEA?

### Dues Transmittal Agreement

- ◆ The Dues Transmittal Agreement provides OEA with the date range of your locals payroll deductions. This allows OEA to set up your billing cycle for the year based upon the number of members in the local and the number of payroll deductions. The agreement is an annual contract between the local and OEA. If no update is received, OEA bases billing on prior year payroll dates. (See pg 1-21 of the Treasurer's Handbook for additional information)

### IRS-990 Verification Form

- ◆ IRS 990 Verification form shows that the local is tax exempt and is proof that the local has filed exempt status with the IRS. This must be submitted annually to the IRS and OEA. (See pg 0-5 of the Treasurer's Handbook for additional information)

### Continuous Roster

- ◆ This is a listing of the local's members on record where membership automatically rolls forward from year to year. It allows the local to make updates (such as cancellations, change to membership type, administrative updates, building change) to the member records. This is critical as the billing for a local is based upon the number of members. If OEA is not notified of cancellations, the local continues to be billed for that individual. (See pg 1-14 through 1-18 of the Treasurer's Handbook for additional information)

### Enrollment Summary/Potential Count Form

- ◆ This form is used to reconcile the number of members the local has submitted with their enrollment forms. The cash payer section is used to verify the payment sent by the local for cash payers (one check on the Local's bank account) sent with the enrollment materials. (See pg 1-35 of the Treasurer's Handbook for additional information)

## Miscellaneous:

### **2019 District Treasurer's Workshops**

The following OEA District Treasurer's Workshops have been scheduled and are open to other Leaders in your Local:

WEOA on July 10, 2019: ECOEA on July 15, 2019: SEOEA on July 18, 2019: NWEOA on July 23, 2019: NEOEA on July 24, 2019: SWOEA on July 30, 2019: EOEA on August 5, 2019: NCOEA on August 6, 2019.

For your convenience, you can also attend another districts workshop by contacting them to reserve your seat if that date works better with your schedule. We will keep you informed as new workshops are scheduled. Be sure to remember to bring your copy of the Treasurers Handbook with you to the workshop.