

# OEA MEMBERSHIP DEPARTMENT

## 2018-2019

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

May 31, 2019

#### June Reminders:

- **17th Enrollment Materials will begin shipping**
- **28th—Dues payment to OEA.** (Remember to include your local's 4-digit ID number on your check payments.)
- **Remember to take your current copy of the Treasurer's Handbook with you to the upcoming Treasurer's Workshops.**
- The 2019-2020 Dues Rates will be posted on the OEA Website at [www.ohea.org](http://www.ohea.org) in mid-June.

**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



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.

- Enclosed is the monthly billing statement for the month of May 2019.
- **IMPORTANT: Membership Enrollment Materials for the 2019-2020 Membership Year will be distributed in June.** The materials will be mailed directly from OEA to the home address of the Treasurer on record once the details have been finalized and will include: Continuous Member Roster for Review, New Year Processing Documents, and a return envelope. **Reminder:** The Enrollment and Renewal Forms will also be sent to the home address of the Treasurer of record directly from our print vendor. The Treasurer will receive a Pre-determined number of Enrollment Forms (based on 25% of Potential Membership) and Pre-printed Renewal Forms for the Annual Renewal Members. This means the Treasurer will receive two separate mailings for the 2019-2020 membership enrollment materials. Both mailings will begin shipping June 17th.
- 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. 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.
- **Transitioning Treasurer's—New Banking Regulations when changing names or opening accounts:** Your bank may now request "Articles of Incorporation or Organization" as well as the registration information from the State of Ohio's Secretary of State office. This creates a problem for most local associations as most are not incorporated and have never filed Articles with the Secretary of State. To be able to provide the bank with a state registration there is a process available for our unincorporated local associations:
  - Go to the Secretary of State website and search for "Form 580" and complete the requested information.
  - "Form 580" requires the naming of a designated "Statutory Agent". OEA recommends this individual be the Local Association President.
  - "Form 580" requires a \$25.00 fee to be paid upon submitting the information.
  - Upon completion of this form the local association will receive a registration number which can then be provided to the banking institution.
  - Your bank may also require the proof of your local association tax status. The local should be prepared to provide a copy of their most recent Form 990 filing/confirmation and/or their tax determination letter from the IRS.
  - Some banks are also requiring meeting minutes which reflect the names of new bank signers as well as the completion of additional documents for that individual bank. Therefore, it is recommended the local association representatives be prepared to be at the bank location long enough to complete these additional documents. It is also highly recommended the prior signers be in attendance when changing names on the account if possible.

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

## Frequently Asked Questions:

### .....WRAPPING UP THE 18-19 YEAR (Reconcile, Reconcile, Reconcile!!)

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

- **Membership Reconciliations**—Be sure to 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 make sure all outstanding dues payments are current.
- **Local Association Leader Updates**—Send all addresses, non-work e-mail's and any changes in leadership roles to your OEA field office.

**And** if you are an outgoing Treasurer, here are a few suggestions on working with the Treasurer-Elect:

- 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 cardstock Reference section.)
- Forward the Treasurers Handbook with any notations you may have made
- Discuss Bank Account Signature and Access Changes (See New Banking Regulations on front)
- Review Budget
- Complete Change of Address for: Bank, School District and IRS.
- Attend an OEA Treasurer's Workshop together.

## Miscellaneous:

**Members retiring?** Remind them if they are no longer working in the field of education, they can remain an important part of the association by joining as a retired member in the OEA/NEA. Online enrollment is available at <https://ims.nea.org/JoinNea>. Additional information can be found in the Treasurer's Handbook or the member may contact In-OEA by calling 1-844-632-4636 or at [membership@ohea.org](mailto:membership@ohea.org).

### 2019 Summer Academy

OEA Summer Academy is scheduled for June 17th through June 18th. Go to <http://bit.ly/OEASA2019> for more information.

### 2019 District Treasurer's Workshops

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

CENTRAL on June 10, 2019: WOEA on July 10, 2019: ECOEA on July 15, 2019: SEOEA on July 18, 2019: NWOEA 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 as you will be provided updated pages during the workshop session.

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