

# OEA MEMBERSHIP DEPARTMENT

## 2019-2020

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

November 29, 2019

#### December Reminders:

- **7th**—OEA Representative Assembly
- **20th**—OEA Offices will close for Winter break and will re-open January 2, 2020
- **27th**—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- December billing statements are mailed after winter break. Therefore you may receive it a few days later than normal.

Please find enclosed the November 2019 billing statement for the current 2019-2020 Membership Year. You should have already received an electronic roster of the members on record for this membership year. Please be sure to take time to thoroughly review this information.

#### Ohio Education Association Membership Reconciliation Tips

Your local's billing and monthly amount due to OEA is dependent on accurate membership records. OEA relies on local associations to provide accurate and timely information to both OEA and the employer payroll department. To ensure proper billing, it is imperative the local, employer and OEA membership records match. It is important to have strong communication between you and your payroll office.

The OEA monthly billing for each membership year is calculated based on the local's current membership records and the local's Dues Transmittal Agreement for that membership year.

To confirm the local is collecting the correct amount of dues per member, and that OEA is billing the local for the correct memberships for the membership year, it is important the local maintain ongoing membership reconciliation throughout the membership year. You, as Treasurer, should be receiving from your payroll office the exact amount OEA is billing you each month. If that is not occurring, it is important you take the time to review all membership records.

Some quick things to check:

- Compare the OEA membership roster to the payroll deduction list received with each payment from the employer. Do the lists match? Is everyone currently having deductions?
- Verify that each member's payroll deduction amount is enough to meet their full year's dues obligation before payroll deductions come to an end for that membership year. Have there been deductions missed? Are the deducted amounts correct?
- Confirm the local has collected the full year's dues obligation for all cash payers as those are due in full at the start of the membership year.
- If members are missing from the OEA roster and/or the payroll deduction list, investigate and take corrective action to make sure the members' dues obligation amounts are being met. Work with your payroll office and/or OEA Membership to make sure all have the exact same information.

The update form provided to you in each billing statement should be used to make any needed changes or edits. Providing these updates will ensure all billing will remain accurate and current throughout the membership year.

Please reference the Treasurers Handbook Chapter 1 section titled: "Reconciliation of Local Association Members" for additional information.

If you have questions or need additional detailed assistance regarding reconciling your local's membership records, contact infoOEA at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org).



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: InfOEA at 1-844-632-4636

## **IRS-990 Filing**

The OEA IRS-990 Verification Form must be returned to OEA no later than January 20, 2020. This is a confirmation of your 990 tax filing required for all locals and is also a criterion for the Local Treasurer's Award. **Contact Shawn Primm at [primms@ohea.org](mailto:primms@ohea.org) for IRS filing assistance.**

When processing your **annual** 990-Filing with the IRS during the period of September thru January 15<sup>th</sup>, remember this filing is for the 2018-2019 Fiscal/Membership Year (if the period is from September 1<sup>st</sup> – August 31<sup>st</sup>) and **tax year 2018**.

## **Upcoming Deadlines:**

- January 20th—IRS 990 Verification submitted to OEA
- January 30th—The application for the Fiscal Fitness Award needs to be received by the OEA Secretary/Treasurer. Locals have the opportunity to meet the criteria for the 2019 award based upon their financial performance for fiscal year 2018-2019. The OEA Fiscal Fitness Awards will be given at the May 2020 Representative Assembly where locals will be recognized with cash awards for their financial performance. All of the criteria and the process for participating in this program are available online by logging onto the OEA website. The OEA Treasurer's Handbook is another source of information.