

# Bloomington IEA Office Training Day July 29, 2014 9:00 am-4:00 pm

Please plan to join us on July 29, 2014 for a Training Day designed for local leaders & association representatives. All members in Regions 14 & 62 are invited to attend.

## **9:00-10:30** *Financial Procedures for IEA Local Associations & Regions*

This session covers the basic financial concepts and procedures which should be employed by local associations and IEA regions. This is not just for local and region treasurers; other officers such as local presidents should be aware of these issues as well.

Some of the areas included are: tax-exempt/not-for-profit status; IRS requirements; independent audits of the financial records; basic internal control concepts; budgeting; documentation requirements; accounting for political action funds; and record retention guidelines.

Participants will receive a copy of the Financial Procedures for Locals and Regions handbook.

## **10:45-12:15** *Membership Processing*

Membership contacts are strongly encouraged to attend this session, regardless of how long they have been serving in their position. We will cover adding new members, removing previous members, and making changes to existing members information. We will explain how to handle members on leave, members who have been RIFd, and steps you can take to keep your membership roster accurate throughout the year.

Having proper procedures in place to handle your membership changes is very important for your local. New members must be processed on a timely basis so that membership cards can be distributed and members can receive their Access discounts as well as important IEA publications. Also, inaccuracies in your membership roster distort your billing statement which can lead to your local incurring penalties.

Participants will receive a Membership Processing Guide, which explains every aspect of member changes. You will also receive your local's membership roster, which you will use to process all changes.

## **12:15-1:00** *Lunch provided by Jason's Deli*

## **1:00-4:00** *Training for Association Representatives & Leaders*

During this session, Association representatives and leaders will be trained on a variety of topics by IEA staff. Topics will include NEA Member Benefits, Fair Share, Duty of Fair Representation, running local elections, the role of the Association Representative, Being an Effective Advocate, and more!

Please RSVP to Martha Fritcher via email at [martha.fritcher@ieanea.org](mailto:martha.fritcher@ieanea.org) or by phone at (309) 663-6400 by Tuesday, July 22 if you plan to attend any or all sessions.