

NEA EARLY ENROLLMENT MEMBERSHIP INCENTIVE PLAN: RECRUITING TOOLS

Here are some features of the *Plan* to highlight in enrolling **first-time Active** and **new Student Program recruits**.

A. Powerful Incentive

- 1. No Cost.** Between April 1 and August 31, 2015, the *NEA Early Enrollment Membership Incentive Plan* offers eligible recruits no-cost access as “Insureds” in the NEA Educators Employment Liability (EEL) Program and access to select NEA Member Benefits programs.

Without the *NEA Early Enrollment Membership Incentive Plan*, first-time Active members who sign up during the 2015-16 school year would have to pay prorated NEA dues to receive these membership benefits (NEA Bylaw 2-7).

- 2. Limited Eligibility.** Early enrollment is limited to recruits for the 2015-16 membership year who are either:
 - a. Individuals who sign up and pledge to pay unified Active membership dues as a first-time Active member beginning September 1, 2015 or
 - b. New NEA Student Program recruits who sign up and fully pay NEA Student Program dues for the 2015-16 membership year at the time of enrollment.

For all purposes, including membership counts and governance representation, early enrollees are non-members until the membership year begins on September 1, 2015.

B. Additional Benefits

Early enrollees have access to an array of NEA Member Benefits programs. Please note that first-time Active early enrollees are not eligible to participate in the NEA Complimentary Life and Introductory Life Insurance programs until their memberships are fully activated in September 2015.

For a comprehensive look at all the programs and services NEA Member Benefits offers early enrollees, visit www.neamb.com/earlyenrollee.

C. Start Date for Benefits

Access to NEA EEL Program benefits will begin no earlier than April 1, 2015. The Early Enrollment date is the date that the individual signs the state affiliate's early enrollment form and the accompanying authorization form for payment of his or her 2015-16 dues commitment (or April 1, if signed on March 31 or earlier).

After the state affiliate has processed the early enrollment forms and added new enrollees to their membership database, early enrollees will be granted access to qualified NEA Member Benefits programs.

NEA EARLY ENROLLMENT MEMBERSHIP INCENTIVE PLAN: MEMBERSHIP FORM REQUIREMENTS

State affiliate participation in the *Plan* is optional, but participating state affiliates must meet these requirements.

The membership form requirements for early enrollment of **first-time Active** recruits are summarized below.

1. **The Pledge.** All early-enrollment membership forms must incorporate the following or equivalent language for first-time Active recruits who sign up for the *Plan*:

As a participant in the [name of local association/state association/National Education Association] Early Enrollment Membership Incentive Plan, I am eligible to receive—prior to September 1, 2015, but in no event before April 1, 2015—benefits under the NEA Educators Employment Liability (EEL) Program, as well as access to select NEA Member Benefits programs.

As a condition of eligibility for these benefits, I agree to pay the appropriate unified **Active** membership dues for the 2015-16 membership year in accordance with established payment procedures. Should I fail to do so, my eligibility to receive benefits under the NEA EEL Program shall immediately terminate. In addition, I shall become liable for the cost of any benefits that were provided to me under the NEA EEL Program prior to September 1, 2015.

2. **Enrollment Date.** State affiliate staffs are responsible for confirming the date of eligibility (enrollment) to the NEA EEL Program insurance carrier on any NEA EEL Program claim form. The enrollment date is the date that the individual signs the early enrollment form (or April 1, if signed on March 31 or earlier).

The membership form requirements for early enrollment of **new NEA Student Program** recruits are summarized below:

1. **Upfront Dues Payment:** New NEA Student Program recruits who sign up for early enrollment must pay the full NEA Student Program dues for the upcoming year (September 1, 2015 through August 31, 2016) at the time of enrollment.
2. **No Pledge Necessary.** Upfront payment eliminates the need for new student program recruits to sign off on the pledge. However, affiliate staffs are responsible for ensuring that membership records correctly indicate that new Student Program recruits are designated as early enrollees. Your procedure might be as simple as writing "EARLY ENROLLEE" on the membership form that you currently use, so that the information is captured on the form at the point of enrollment. Then it is available to be entered into your state affiliate's automated membership tracking system.

NEA EARLY ENROLLMENT MEMBERSHIP INCENTIVE PLAN: REPORTING AND RECORDKEEPING REQUIREMENTS

State affiliate participation in the *Plan* is optional, but participating state must meet the following requirements:

1. **Reporting Early Enrollee Counts.** Only participating Independent Processing States (California, Michigan, New Jersey, and Pennsylvania) are required to report directly to NEA Financial and Membership Services the total number of first-time Active and New Student Program recruits who signed up as early enrollees in 2015 (broken down by month and by Active and New Student recruits).
2. **Where to Send Report.** The reports from participating Independent Processing States are due via email to Laurie Johnson, ljohanson@nea.org on or before September 30, 2015.
3. **Recordkeeping.** Participating state affiliates must maintain enrollment records on early enrollees for a minimum of **15 years** so that eligibility can be verified if an early enrollee has an EEL Program claim in future years. Upon request of NEA or the insurance company, your state affiliate should be able to provide the following backup documentation:
 - a. The date on which the early enrollee signed the membership form,
 - b. The date on which the early enrollee signed the payment authorization form or, for new Student Program recruits, paid the dues for the following membership year; and
 - c. The date of the occurrence, if there is an EEL claim, that gave rise to the claim (the date on the membership form must be earlier than the date of the occurrence for coverage to be applicable).

See the ***Membership Processing Procedures for Early Enrollment*** for a step-by-step guide to be followed for keying, recording, and processing early enrollees.