

**STANDING RULE # 1**

**Association Identification**

**Incorporation**

- 1. The Association shall be recorded as having been incorporated in March 1981.

**Location**

- 1. Headquarters shall be located as determined by the Board of Directors.

**ASSOCIATION OF COLTON EDUCATORS**



**STANDING RULES**

## STANDING RULE # 2

### Association Duties and Responsibilities

#### Site Representative Duties and Responsibilities

1. Attend all Representative Council meetings while school is in session.
2. Hold monthly site meetings. Turn in monthly reports to the ACE Office in a timely manner.
3. Conduct all ACE/CTA/NEA elections at the site, properly and in a timely manner.
4. Represent unit members in meetings with Administration, including filing grievances properly and in timely manner.
5. Maintain an ACE Bulletin Board at the site.
6. Distribute communications from the ACE Office in a timely manner and post on the ACE bulletin board.
7. Provide communication from the site to the Association.
8. Serve on an Association Standing committee OR serve as an ACE Representative on a District committee.
9. Representatives who fulfill all their duties and responsibilities, with eighty percent (80%) attendance at Representative Council meetings and monthly site meetings throughout the school year will receive a stipend equal to current local chapter dues. This stipend will be given out at the end of the school year.
10. Representative should communicate with the Association in a timely manner through email, texting, phone call or one on one. If a Representative does not have a personal email, the association will provide one.

#### Executive Board

1. The officers of the Association shall be a President, Vice-President, a Secretary, a Treasurer, two (2) High School Directors, two (2) Middle School Directors, five (5) Elementary Directors, and one (1) Support Personnel Director, one (1) At-Large Director, and Past President (non-voting member).
2. Stipends for Vice-President, Treasurer and Secretary shall be dispersed twice a year, if all duties and responsibilities were met.
3. Stipends for Executive Board shall dispersed at the end of the year, if all duties and responsibilities were met.
  - a. President: will be reimbursed per diem salary up to 200 hours a year plus mileage reimbursement upon return of receipts.
  - b. Vice-President: \$2400 plus mileage reimbursement upon return of receipts.
  - c. Secretary: \$900 plus mileage reimbursement upon return of receipts
  - d. Treasurer: \$1200 plus mileage reimbursement upon return of receipts
  - e. Directors: \$350 plus mileage reimbursement upon return of receipts

4. Executive Board Members will communicate with the Association in a timely manner through email, texting, phone call or one on one. If an Executive Board Member does not have a personal email, the association will provide one.
5. Office Hours - The Association office hours shall be determined by the Executive Board.
6. Executive Board Members who fulfill all their duties and responsibilities, with eighty percent (80%) attendance at meetings throughout the school year will receive a stipend equal to current local chapter dues. This stipend will be given out at the end of the school year.

#### Presiding Officer

1. The Association's presiding officer shall be responsible for a reasonable number of regular office hours during the school year. Stipend shall be paid for twenty-four (24) days worked beyond the number of workdays specified in the Collective Bargaining Agreement, with approval of the Executive Board, at per diem. The President will be paid for not more than two (2) days each month.

#### Duties of Delegates to the NEA Representative Assembly

1. Each delegate will be expected to arrive in the host city in time to ensure registering as an official delegate to the Representative Assembly (RA) with the local, the California delegation and the NEA.
2. Each delegate will be expected to attend all caucuses of the California delegation. Normally the caucus begins at 7:00 a.m. daily. Delegates must be registered with the California delegation in order to participate.
3. Each delegate is expected to remain through the entire RA and attend all business meetings.
4. Each delegate is strongly encouraged to attend NEA budget, resolution, and by-law hearings.
5. Each delegate should take into consideration ACE policy and recommendations when voting.
6. Each delegate is encouraged to participate fully in all activities of the California delegation.
7. Each delegate will be expected to sit with the San Geronio Service Center Council delegation on the RA floor or to inform the appropriate person where he/she will be seated.
8. Each delegate will be advanced sixty percent (60%) of the RA allowance after they are elected for the purpose of purchasing transportation to the host city and to reserve hotel accommodations, *the remaining RA allowance up to forty percent (40%) will be reimbursed upon submission of receipts.*
9. All expenses must be in accordance with ACE Standing Rules and Policies.
10. The RA allowance will be reduced proportionate to the amount of time and/or the number of required meetings missed. At each session or caucus each delegate will be required to check in with the designated ACE representative.
11. Each delegate must sign a copy of this Standing Rule and agree to abide to its terms prior to funding and/or reimbursement by ACE.

#### Membership

1. All duties and rules pertaining to membership shall be found in the ACE Bylaws.

**Budget and Disbursement of Funds**

1. The Treasurer or designee shall give a report of the disbursement of funds at regular Board of Directors and Representative Council meetings.
2. Expenses outside the approved budget shall be approved by the Executive Board.
3. Standard donation for a deceased Active member of ACE will be a donation of \$500.

**Committees**

**Committee Duties and Responsibilities:**

1. All committee members must be active Association members
2. Committee appointments will be for a minimum of one year, length is to be determined by the Executive Board.
3. Schedule all meetings in a timely manner and inform the Social Media Technician/Vice President to add to the ACE calendar
4. Keep minutes of all meetings and attendance roster of all meetings
5. All committees shall report to the ACE President after the meeting
6. Committees shall select a person to report out to Representative Council and Executive Board meeting as requested

**Ex-Officio Membership on Committees:**

1. The President and the Vice-President shall be ex-officio non-voting members of all committees.

**Communications, Reports, Publications:**

1. A newsletter *will be published approximately* 10 times each year.
2. State Council Representative(s) are responsible for a meeting-by-meeting report to ACE members.
3. Negotiating team shall survey the membership before starting negotiations
4. Negotiating team update shall be distributed to all members after each session.

**Special Committees:**

1. *All duties and rules of special committees shall be as set forth in the ACE Bylaws.*
2. *All committees will attend scheduled meetings.*
3. *All Committees will Report to Executive Board and /or Representative Council.*

**ALCO Uniserv Committee**

**Benefit Advisory Committee**

**Duties of the Representative to the District Curriculum Council**

**Duties of the Bargaining Team:**

See Bylaws

**Duties of the Budget Committee:**

1. Recommend an annual budget to the Executive Board by August 1<sup>st</sup>

**Duties of the Communication Committee:**

1. Update the web site as needed.
2. Design, publish and distribute a regular newsletter.

**Duties of the Community Outreach Committee:**

1. Plan and coordinate the Association's participation in community events.

**Duties of the Crisis Committee:**

1. Organize, plan and coordinate all events including rallies.
2. Prepare all communications regarding ACE events.
3. Communicate and coordinate with the ACE Bargaining Team.

**Duties of the Grievance Committee:**

See Bylaws

**Duties of the Membership Committee:**

1. Promote and publish "shout outs".
2. Plan and distribute gifts for "Day of the Educator".
3. Recruit and retain members.

**Duties of the Scholarship Committee**

1. Prepare all communications regarding ACE scholarship
2. Review applications for potential recipients

**Duties of the Social Committee:**

1. Plan and coordinate holiday party, retirement party, mixers and other special events.
2. Prepare all communications regarding ACE social events.

**Political Action Committee (ACEPAC)**

1. The ACEPAC is established for the following purposes:
    - A. To inform members of voting records positions of Board members and candidates that may affect the member's classroom, working conditions, rights and benefits.
    - B. To serve as a voluntary structure through which ACEPAC members may give direct and indirect financial contributions to support or oppose such
      1. Local candidates for Board Office
      2. Local issues
- As are deemed worthy of support (or opposition) from the standpoint of educational issues and without regard to partisan consideration.

C. It is the intent of ACEPAC to work in a cooperative manner, rather than in isolation from other district employee groups, to support our schools in an effective way.

#### 2. Executive Committee

A. The ACEPAC Executive Committee shall consist of at least five (5) members as representative of the Association membership as possible. Each member shall be nominated by the President and approved by the Association's Executive Board for a two (2) year term. The Executive Committee shall select the Chairperson of the ACEPAC. The chairperson of ACEPAC shall select the Treasurer of the ACEPAC. No officer or member of the ACEPAC committee shall be deemed to be an officer of ACE by virtue of holding an office in or being a member of ACEPAC.

B. The ACEPAC Executive Committee shall make expenditures and hold funds in the Committee's name in a bank account, savings and loan account, short term certificate or savings account, provided that such funds shall be held entirely separate and apart from the funds of ACE.

C. The ACEPAC shall report four (4) times a year to the ACE Executive Board and the Rep. Council, showing in each report the receipt and expenditures of funds, the place and amount of deposits, and any outstanding liabilities of the ACEPAC in excess of \$100.00. Any such report shall also be made available to any member of ACE who contributes to said funds, upon his/her request.

D. The ACEPAC shall file reports with any governmental agency in connection with the performance of any of its duties in the name of the committee or the committee members.

E. The ACEPAC shall comply at all times with the Bylaws of ACE.

F. ACE may cease to transfer funds to the ACEPAC Issues fund or the ACEPAC Candidates fund if any initiative that restricts use of PAC funds is enacted into law. The decision to cease transfer of funds shall be by the majority of the ACEPAC.

#### 3. Funding

A. Each unit member will be assessed a yearly contribution of five (\$5) dollars.

B. The contributions will be allocated into two (2) different funds; an Issues fund and a Candidate fund, at the discretion of the ACEPAC Executive Committee.

C. Any member who elects, on or before thirty (30) days after the commencement of his/her school year, that no part of his/her membership dues shall be allocated to such funds, shall notify the Association in writing of his/her election and no part of such member's dues shall be allocated to the ACEPAC.

D. Any member who elects not to have dues paid to the ACEPAC shall have the same portion (\$5.00) allocated to the general fund or to a scholarship fund designated for any unit member's graduating high school senior and administered by the ACEPAC Executive Committee. The scholarship will be awarded when the fund reaches \$1000.00 dollars.

#### 4. Expenditures

A. No amount of funding or support in kind can be given to support any school board candidate unless they are supported or endorsed by the Association of Colton Educators. No amount of funding or support in kind can be given to support or oppose a local education issue or ballot measure unless this is consistent with the position (support or oppose) of the Association of Colton Educators.

#### 5. Endorsement Procedures

A. The ACEPAC may endorse a school board candidate after a thorough and fair process in which all candidates are given equal access to the committee, and a good faith effort has been made to determine their positions on important issues facing education.

B. The ACEPAC may endorse a ballot measure after a thorough and fair process in which spokespersons for both sides of an issue or ballot measure are given equal access to the committee, and a good faith effort has been made to determine the facts and relevance to education.

C. Recommendations for endorsements are made by the ACEPAC, adopted by the ACE Executive Board and ratified by the ACE Rep. Council.

D. For school board elections, and other elections that have a direct impact on other employee groups, ACEPAC will make every effort to establish ways of coordinating the endorsement process with other associations such as CSEA and MAC to reach consensus on endorsements.

#### 6. Membership and Meetings

A. Any ACE member may request to be on the ACEPAC and may serve with the consent of the ACE Executive Board.

B. The Chairperson will call meetings when there is business to conduct. All members of the committee will be notified in advance of the meetings. A quorum consisting of a majority of committee members is necessary to conduct business.

## STANDING RULE # 3

## Association Staff

### Association Employees/Staff

1. Job Description of Association Administrative Assistant: The following duties are performed by the Association Administrative Assistant:
2. a. Secretarial:
  - Processing of correspondence and mail
  - Preparing, typing and duplicating materials for the Association
  - Preparing and supplying agendas for meetings
3. b. Financial- assist with all
  - Collecting and depositing of Association funds in appropriate accounts
  - Keeping current, accurate ledgers of Association deposits and expenditures
  - Paying association bills when due
  - Reconciling of monthly bank statements
  - Preparing monthly and yearly reports
  - Preparing books for yearly audit by accountant
4. c. General:
  - Keeping current membership roll
  - Purchasing needed office supplies
  - Answering inquiries by phone and in person
  - Preparing for association meetings
  - Keeping office files up to date
5. d. Other:
  - Maintain conference information (registration, hotel, transportation) for members
  - Working knowledge of contract
  - Assist members in filing grievance and adhering to timelines
  - Assist members with work related problems. Referrals, group legal service forms and appointments
  - Write articles for in house publications
  - Write correspondence to members and affiliates
  - Attend workshops, meetings and conferences as needed
  - Attend city chamber functions as needed
  - Maintain records for representative council/board of director stipend
  - Serve as property manager for facilities

### Evaluation of Association Administrative Assistant

1. The Administrative Assistant will be evaluated annually by the Association of Colton Educator's President. The evaluation shall be presented to the Administrative Assistant in writing. The Administrative Assistant shall have the right to appeal the evaluation to the Executive Board of Directors.

### Employment Of Staff

1. a. General Policies: The Representative Council shall have the authority to adopt general policies for staff employment and to make general allocations in the Annual Budget for the expenses in connection therewith.
2. b. Employment Authority: Within the established policies and budget limitations, the Executive Board shall be the employment authority for all paid staff and for setting forth in contract and/or job description form the terms and conditions of employment. The President with approval of the Executive Board shall annually evaluate the above-mentioned staff.
3. c. Non-Discrimination Clause: Paid staff shall be entitled to the same general rights of due

process as the Association seeks to ensure for its own membership. The same non-discrimination policy shall apply to paid staff as is contained elsewhere within the Bylaws for membership rights.

### Social Media Technician:

The following duties are performed by the Social Media Technician:

1. Attend the same amount of Representative council meetings as the site representative
2. Create, maintain, enhance and update in a timely manner the Association Web Site
3. Assist Vice President in creating, maintaining and updating in a timely manner the On Line Association Calendar
4. Publish newsletter on Web Site
5. Upload new information at the directive of the Executive Board
6. Update various media of communication
7. Implement Social Media Search Engine Optimization (SEO) tactics aligned with our ACE's keywords and SEO strategies.
8. Manage the social media marketing strategy of ACE with a focus on Twitter, Instagram and Facebook
9. Execution of all social media activities (i.e. tweeting, sharing, engaging, liking, increasing social reach) for ACE.
10. Communicate in a professional, but unique social media "voice" for ACE; directly aligned with the ACE's thought leadership and content.
11. Create social media campaigns to further develop ACE's Brand in the community.
12. Tweet in order to engage social media influencers within teacher community, and, increase followership of our social media profiles. The goal is to receive multiple mentions and retweets in the process.
13. Post to Facebook, finding new ways to leverage Facebook for professional purposes in order to further develop ACE's brand in the community.
14. Monthly report of activity to Executive Board presented to Executive Board.

Stipend: \$2,000 plus mileage reimbursement upon return of receipts.

## STANDING RULE # 4

### Finances

1. Dues, Fees and Contributions.
  - A. Annual membership dues may be paid in cash, by payroll deduction, or by special arrangement. The

amount shall be as prescribed in Article II, 2.9 and 2.10 each year following the adoption of the Annual Budget. Retirees may consider themselves lifetime, non-voting, non-dues paying members of ACE.

B. Special assessment fees beyond normal annual dues may be levied against Active Members only by a two-thirds (2/3) vote of the Representative Council following ten (10) school days notice to the Active Membership.

C. Contributions may be accepted for the general budget by action of the Executive Board. Donations of materials or property may also be accepted by similar action. Where conditions as to use are attached to a contribution or donation, the Representative Council shall set policies within which such contributions or donations may be accepted.

2. Fiscal Year: The Fiscal Year shall be defined as the period of time between September 1st and the following August 31st, inclusive.

3. Adoption and Annual Budget: The preliminary Annual Budget shall be submitted to the Representative Council by action of the Executive Board and shall include the recommended dues level needed to fund the budget. A copy of the proposed budget shall be posted in each local faculty unit at that time and remain posted until the Annual Meeting. Final refinement and adoption shall be the responsibility of the Representative Council. Changes in and among categories not to exceed five (5) percent of the total for the given category may thereafter be made during the fiscal year by action of the Executive Board. Changes in excess of this percentage shall be made only with the approval of the Representative Council.

4. Expenditure of and Accounting for Funds: The Executive Board shall be responsible to the Representative Council for setting up adequate procedures for control of the expenditures of funds. The Board shall arrange for an annual audit of expenditure and budget by an independent agency with a written report by such agency also furnished to the Representative Council and posted on each campus bulletin board.

5. Restriction Upon Indebtedness: The Executive Board shall not incur indebtedness where the payments for same exceed the amount provided in the budget for that purpose without prior approval of the Representative Council.

6. Authorized Signatures: The President, Vice President, Secretary and/or Treasurer shall be the authorized signers of Association checks.

#### **Records And Publications, Notices And Correspondence**

1. Availability of Records: The Executive Board shall insure that the membership has adequate access to the non-privileged business records of the Association.

2. Publications: Provisions for publications, official policy statements, and other similar items shall be contained within the Standing Rules.

3. Notice to the Membership: The giving of Notice to the membership, as used or required in these Bylaws, shall be defined as making available to such membership information to which they are entitled concerning the conduct of Association affairs in such manner as to permit participation of the membership in the organizational decision-making process. The minimum requirements for the giving of Notice, wherever such is required by the Governance Documents, may be the posting in a conspicuous place in each of the following locations of the item or document necessary for such notice:

- A. The organizational headquarters.
- B. A bulletin board maintained within each Local Faculty Unit.

4. Receipt of Petitions and Correspondence: Petitions, correspondence and other communications addressed to the Association or to its Executive Board or Representative Council shall be considered properly received when delivered either to the President and/or the employed staff secretary. In the event

of the unavailability or incapacity of the President, the Vice-President may act to receive such items.

## **STANDING RULE # 5**

### **Travel and Other Expenses**

1. The rules governing the control and payment of necessary expenses of Association officers, directors, employees, and of such other persons as may be duly authorized to represent the Association from time to time shall be adopted.

The President and Vice President of the Association shall be allowed the use of the Association credit card during his/her term of office to meet incidental expenses.

Incidental ACE expenses purchased by the President and Vice President *shall not to exceed \$250 per day per expense.*

2. Authorization of Delegates: No person shall have authority to attend conventions or other professional meetings as an official delegate or representative of the Association unless such representatives have been duly and legally elected as a delegate or representative by the active membership. The Executive Board of Directors shall determine the extent to which any such delegate or representative shall receive reimbursement of expenses from the Association.

### 3. Expense Reimbursement Policy

a. Registration- The Association will register and pay for conference registration costs – including meals provided by conference.

b. Transportation

Plane – actual most economical coach fare.

Train/Bus – actual fare.

Auto – IRS reimbursed rate per mile round trip by shortest highway route. Mileage reimbursement cannot exceed the cost of plane fare.

Airport Shuttle – Will reimburse the cost of airport shuttles to and from the meeting site. Taxi fare shall be reimbursed only when no other form of transportation is available.

Parking – Actual, most economical cost of airport parking and hotel parking (valet parking will not be paid unless it is the only available parking).

Car Rental – ACE will not reimburse for car rental without prior approval from the Board of Directors.

Airport Parking- ACE will reimburse the actual cost

c. Lodging – *Cost of single occupancy room.* If travel by private car means an extra hotel or motel charge, such charge is not reimbursable. Personal charges such as laundry, valet, telephone calls, snacks and entertainment are not reimbursable. Hotel Wi-Fi cost is reimbursable. Portage is reimbursable up to seven (7) dollars per day.

d. Meals – Actual amounts paid including tax and tip, not to exceed \$8.00 for any one day per person. Meals, which are provided by the conference, will not be reimbursed.

e. Receipts need to be provided to get reimbursed.

### Conference Attendance

Priority will be given to the following requests:

1. First time attendees
2. Committee Chair
3. Committee Members
4. Site Representatives
5. Executive Board
6. General Membership

Requirements for attendance:

Submit a conference attendance form two (2) weeks prior to cut off date or deadline whichever comes first by the deadline announced.

Provide a written summary report- top 3 things learned and email it to the Communications Committee.

Members will be limited to 2 conferences per fiscal year.

Specific conferences have limited attendance due to election requirements i.e. NEA/RA.

Specific conferences have targeted attendees i.e. President's conference, Fall Leadership and Summer Institute.

Unless an extreme hardship is present, the Association shall not pay for substitutes for conferences during regular student school days.

Conferences over 200 miles away from the Association's office will be limited in attendance based on budget. See priority for conference attendance.

## STANDING RULE # 6

### Grievances

#### Grievance Procedures

1. A unit member desiring to file a grievance should initially review the procedures outlined in the Collective Bargaining Agreement to insure that the timelines specified therein are being followed. He/she should immediately contact the site grievance representative. Upon request, the Association shall provide continual assistance to unit members throughout the pre-arbitration levels of the grievance procedure.

2. The site representative may recommend the grievant meet with a member of the grievance committee or with the entire committee if deemed appropriate for further action.

3. If the grievance is not settled prior to the arbitration step, the grievant may request in writing that the Association take the grievance to arbitration.

4. The grievance committee may be asked by the Executive Board to make a recommendation on whether or not to have the grievance proceed to arbitration.

#### Arbitration

1. All decisions to take grievances recommended for arbitrations reside with the Executive Board. If the Board votes against taking the case to arbitration; the unit member (grievant) may submit a written request for an appeal. The appeal process will include the unit member or designee presenting the grievance to the Representative Council, in closed session. The rationale for the Executive Board's decision will also be presented. A majority vote of the Representative Council will determine if the grievance is moved, on appeal, to arbitration.

#### Right of Consultation

1. All decisions to request consultation with the District on educational objectives, content of courses and curriculum, money and the selection of textbooks reside with the Executive Board. A unit member or designee may submit a written request or present to the Executive Board in closed session. The Executive Board shall vote and report out. A majority vote of the Executive Board will determine if the consultation is moved.

\*Some consultations are time-sensitive therefore the President might call an emergency board meeting.

## STANDING RULE # 7

### NOMINATIONS AND ELECTIONS

#### A. Elections Committee

1. There shall be an Elections Committee.

2. The Elections Committee and Chairperson shall be appointed by the president and approved by the Executive Board, to which it is responsible at the beginning of each school year.

3. The Committee shall be composed of at least three members who are not on the Executive Board, who are familiar with the unit operations, and who are not seeking election. Members of the Elections Committee cannot serve on the Executive Board. Members of the Executive Board cannot serve on the Elections Committee.

4. The Elections Committee is charged with ensuring that elections are conducted in a fair and impartial manner.

5. Any Association member who is either a candidate on the ballot or whose immediate family member is a candidate shall abstain from all election committee activities on that particular ballot.

6. Any member of the Election Committee who declares their candidacy for a position on the Board of Directors shall resign from the Election Committee.

7. The duties of the committee shall be to ensure that the election shall follow the procedures of the Bylaws and are conducted in a fair and impartial manner.

8. The duties shall include instruction to the Representative Council on proper election procedures.

#### B. Election Requirements

1. The chapter shall ensure that an open nomination procedure is in place (i.e. any member may nominate any member, including themselves). The only qualification for office shall be Active membership in the chapter.

2. Every Active member shall be assured of confidential voting, either by electronic or paper means.

3. There shall be at least a fifteen (15) calendar day period between notice of election and the actual voting.

4. A member who is on a leave of absence shall be sent election information by email to their last known personal email address.

5. A chapter shall provide means for all Active members to vote and it shall be the responsibility of the member to notify the chapter if they desire to vote at the ACE office in lieu of the regularly scheduled voting method.

6. If voting by paper ballot, an Active member shall acknowledge receipt of a ballot by signature on a registration sheet at the time of issuance of the ballot or on an envelope when returning the voted ballot. If a roster of Active members is prepared for a school site ahead of time, initials of the member may be accepted.

7. It is the members' responsibility to notify the chapter that one did not receive an email with voting instructions.

8. It is the members' responsibility to keep the chapter updated with the current email address.



9. All elections shall be decided by a majority vote, unless otherwise specified. In the event no candidate receives a majority vote, a run-off election shall be held between the two candidates receiving the highest number of votes.

**C. Announcement**

1. The announcement of election shall include the offices, length of terms, and the election timeline.
2. The announcement shall be publicized in a manner that ensures every member has an opportunity to file a declaration of candidacy.

**D. Timeline**

1. Schools/Work sites on alternative calendars shall be considered when setting election timelines.
2. The timeline for the election shall include dates for:

Announcement of vacancy(ies) and term(s) of office using a method that will ensure each member is aware of the opportunity to file a declaration of candidacy;

At least fifteen (15) calendar days between the announcement date of the vacancy(ies) and the date of the election;

Place, time and date of receipt (date received, not post-marked date) for declaration of candidacy forms;

Final date to acknowledge candidates' declaration of candidacy;

Date on which voting will take place and voting options;

Date by which to request an alternative ballot;

Date, time, and place where results will be calculated should be immediately following the deadline for votes cast;

Date that announcement of results shall be made to leadership, candidates, members and posted at each work site, which date shall be no later than five(5) calendar days following the election results.

Dates and timelines for run-off election, if necessary; and,

Deadline for filing of challenges to initial election and run-off if held (date received, not post-marked date).

**E. Finances and Use of Unit Resources**

1. Chapter monies received through dues, assessment or similar levy shall not be used to promote any candidate for Association office.
2. A candidate may not accept direct contributions from a chapter's treasury or indirect contributions in the form of use of a chapter's assets, facilities, staff, equipment, mailings, good will and credit.
3. A unit may not state or indicate its preference for a candidate in the unit's publications.
4. The use of links to any Association website by a candidate is prohibited.
5. Candidates cannot campaign on any chapter, Service Center Council, UniServ or district created social networking site.
6. District email addresses and/or systems shall not be used for campaigning.

7. The official logo of the unit or official Association title may not be used in a way that suggests that the candidate has the support of the unit, CTA, or any of its affiliates.

**F. Candidate's Rights**

1. Privileges extended to one candidate shall be extended to all candidates.
2. Each candidate shall receive a copy of the election timeline, procedures and guidelines.
3. Each candidate shall have the right to a list of the name and address of work sites and the number of Active members at each site for the purposes of campaigning.
4. Each candidate shall be treated in a fair and equitable manner in the distribution of campaign statements to members.
5. Each candidate shall be given the opportunity to address the Representative Council.
6. Each candidate shall be given an opportunity to campaign between the announcement of candidacy and before voting commences.

**G. List of Candidates**

1. The names of the candidates shall be listed in CTA alphabetical order. The name of each candidate shall be as printed on the declaration of candidacy. When a candidate's last name is hyphenated, the name before the hyphen shall be used for placement on the ballot.
2. In the event that the last name of more than one candidate begins with the same letter or more than one candidate has the same last name, the CTA alphabetical order shall continue to be applied throughout the name including the first name.
3. Names of the office/positions, the term and the names of the candidates will be included on the list.
4. A space for a write-in candidate, except in run-off elections, will be included.

**H. Methods of Voting**

1. Each method of voting must be included in the standing rules in order for the bylaws and standing rules to be in compliance with CTA.
2. All Active members must have an opportunity to vote. Active members who are on a leave of absence or on a dues paying leave shall be notified by email in order to provide them an opportunity to vote.
3. Voting shall be by one or a combination of the following methods:
  - a) **Electronic Voting (primary voting method)**
    1. Choose a vendor from the approved CTA list.
    2. Inform CTA of our choice.
    3. Schedule an Electronic Voting Conference call with CTA.
    4. If a member is unable to vote electronically, it is the member's responsibility to request a paper ballot at the ACE office. Administrative Assistant will follow the rules listed as using Envelope Method of voting. If a member has already cast a vote, the member will not be able to request a paper ballot.
  - b) **Paper Ballots**
    1. On Site Voting or voting at ACE Office-Using Envelopes

1. When voting is conducted at school or specified sites using envelopes, the procedure shall be as follows:
  - a) A list of current Active members shall be prepared, which includes each member's name and school/work address.
  - b) The voter shall be provided with the following:

- (1) A ballot;
- (2) Instructions on
  - a) Folding and placing of the ballot in the unsigned inner envelope;
  - b) Placing of the unsigned envelope into the outer envelope
  - c) Signature and school/work site on the on the outer envelope addressed to the chapter
  - d) Deadline date for receipt of the voted ballot at the chapter office;
- (3) A small envelope (inner envelope) in which to place the voted ballot; and,
  - (4) A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
- c) Prior to the counting of the ballots, the names on the outer envelope shall be checked against the official list of voters. The name on the official list shall be marked to show that the voter has returned a ballot.
- d) The outer envelope shall then be opened and put in a separate stack for safekeeping as a record of voters.
- e) All inner envelopes shall be placed in a separate receptacle.
  - f) The inner envelopes shall be slit and the ballots removed from the envelopes, stacked and then counted.
- g) Refer to section K for the "Counting of Ballots" procedure.
- h) Any Association member who is either a candidate on the ballot or whose immediate family member is a candidate shall abstain from all election committee activities on that particular ballot.
- i) If a member is not able to come into the ACE Office and cannot vote electronically, the member will follow the rules for voting by mail. It must be received in the office before the close of the election.
  - c) **Voting by Mail** (in the rare instance that the prior two methods could not be utilized)
 

Special care should be taken in all phases of handling of ballots to ensure the accuracy and the secrecy of voting by mail. The following procedures and guidelines have been developed for this situation:

    - 1) A list of current Active members shall be prepared, which includes the following: name, school/work and home address.
    - 2) A determination shall be made prior to the election whether the ballots shall be sent to the school/work site or to the home of the member.
    - 3) Each voter shall be provided with:
      - a) A ballot;
      - b) Instructions on
        - (1) Folding and placing of the ballot in the unsigned inner envelope;
        - (2) Placing of the unsigned inner envelope into the outer envelope;
        - (3) Signature and schoolwork site on the outer envelope addressed to the chapter; and
        - (4) Deadline date for receipt of the voted ballot at the chapter office.
      - c) A small envelope (inner envelope) in which to place the voted ballot; and
      - d) A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
    - 4) The ballot shall be date stamped when it is received in the chapter office and then put in a safe place until the votes are to be counted.
    - 5) At the time of counting, the names on the outer envelope shall be checked against the official list of eligible voting members.
    - 6) The name on the official list should be marked to show that the voter has returned a ballot.
    - 7) The outer envelopes shall then be opened and put in a separate stack for safekeeping.
    - 8) All inner envelopes shall be placed in a separate container.

- 9) All inner envelopes shall be opened and the ballots removed from the envelopes and placed in one stack for counting.
- 10) Refer to Section K for the "Counting of Ballots" procedure.

#### I. Vote Requirement

All vote requirements shall be established in accordance with CTA guidelines. Unless otherwise specified, all elections shall be decided by majority vote. Write-in votes are valid and must be counted.

1. A majority vote means more than half of the legal votes cast for each office/position on the ballot.
  2. A plurality vote means the largest number of votes to be given to any candidate or issue.
  3. A two-thirds (2/3) vote means at least two thirds (2/3) of the legal votes cast,
  4. For unit officers, the election will be by majority.
  5. For State Council: [See the *Election Timelines, Procedures, and Guidelines in section IV-9.2 of the CTA Elections Manual.*]
 

If a unit is a single electoral district the election for State Council Representative will be counted and reported by the chapter elections committee.

If the unit is within a multiple unit electoral district, the elections for the State Council Representative will be counted and reported to the Service Center Council Elections Committee. The chapter elections committee returns a signature and ballot verification sheet, voted ballots, and voter roster/sign-up sheets to Service Center Council Elections Committee by deadline date.
  6. If no candidate receives a majority vote, a run-off election shall be conducted among the candidates receiving the highest number of votes. The names on the ballot will be one (1) more than the number of vacancies to be filled. **There shall be no provisions for write-in candidates in run-off elections.**
  7. For NEA Local Delegates, the election will be by plurality or majority vote. With the determination to be made in advance of the announcement of the election by the local. Results must be sent to the CTA Governance Department.
  8. An election for NEA Delegates may be waived and the candidate(s) declared elected if, following a period of open nominations, the number of candidates is equal to or less than the number of delegate positions to be filled. An affiliate utilizing this provision must have adopted a governing provision or election policy allowing such a practice. This election practice will not generate successor delegates unless the nomination process requires candidates for both regular and successor delegate positions.
  9. For NEA State Delegates, the election will be overseen by the Service Center Council. The local Elections Committee shall submit to the Service Center Council the voted ballots, signature sheets/rosters, and a signature and ballots verification sheet. The Service Center Council, which will forward the results to CTA.
  10. For additional CTA/NEA election guidelines refer to the official *CTA Elections Manual*.
- #### J. Counting of Paper Ballots (If paper ballots are used)
1. The Elections Committee shall verify signatures sheets with ballots received, which should be completed immediately following the deadline for receipt of voted ballots.
  2. Each office/position on the ballot shall be treated as a separate race. If a majority vote is required, it shall be calculated as more than half of the legal votes cast for each office/position on the ballot.
  3. Blank and/or illegal ballots for each office/position shall be set aside. Examples include the following:
    - a. Member not listed on the voter roster;
    - b. Voter's intent unclear;
    - c. Votes cast for more than number allowed;
    - d. Votes cast on unofficial ballot (probably reproduced); and,
    - e. Candidate is not a member.

4. Ballots set aside and not counted are:
  - a. More ballots than signature;
  - b. Ballot(s) received after deadline;
  - c. Voting envelopes without a signature; and
  - d. Ballots that are separated from the roster/sign-up sheet.
5. After verification of signatures, ballots shall no longer be separated by site.
6. The Elections Committee should categorize each illegal ballot, make a determination of whether the vote(s) in that category should be counted separately, as listed in four (4) above, and make a note of the decision. The ballots should remain separate.
7. The Elections Committee will prepare the Teller's Report, recording information on the total number of votes cast; the number needed to win/pass, the number of votes received by each candidate/issue and the number of blank and illegal ballots for each office/position with an explanation of illegality, and signed by each Elections Committee member. The Teller's Report shall not contain a school-by-school or site-by-site breakdown report.
8. The Chairperson of the Elections Committee will deliver the report of the election results to the president and interested parties. The election results shall be posted at each work site no later than five (5) calendar days following the counting of the ballots.
9. The ballots and voter sign-up sheets should be retained by the unit for one (1) year after the election.

**K. Calculation of votes for Electronic Voting**

1. Each office or position on the ballot shall be treated as a separate race. If a majority vote is required it shall be calculated as more than half of the legal votes cast for each office/position on the ballot. One exception to the majority vote rule is, all write-in candidates must receive 51% of the total votes cast at that level.
2. Open the electronic platform to reveal election results immediately after voting closes.
3. Calculate any paper ballots that were legally (See definition of legal/illegal votes under Section J, 3 and 4) cast at the chapter office.
4. Add the results from the electronic platform to the tallies of the legally cast paper ballots for a final result.

**L. Observers**

1. Each candidate, or designee, shall be allowed to be present at the vote counting site and shall provide the name of the observer to the Elections Committee 24 hours before counting.
2. An observer shall not interfere with the counting and shall stay in the counting area until the President or designee has been notified of the results and has notified each candidate of the results. The observer must maintain the confidentiality of the election process.

**M. Challenge Procedure**

1. A challenge cannot be initiated until after members have been notified of the election results.
2. Challenges for election of State Council Representatives, Alternates, State, and Local delegates to NEA RA follow procedures in the *CTA Elections Manual*.
3. The challenging party(ies) must notify the unit president and elections chair of a challenge in writing within ten (10) calendar days after the announcement of the results of the election. If the unit president is a candidate on the ballot, please see item number five (5).

The notification must be on the official CTA Challenge Form. (See Appendix R of CTA Elections Manual)

4. Upon receipt of the challenge, the Elections Committee will notify all the candidates in the election being challenged that a challenge has been filed. The names of challengers and challenge forms shall remain confidential. Within ten (10) calendar days after receipt of the challenge, the Elections Committee shall determine if the challenge is valid, using the following procedures:
  - a. Read and understand the elements of the challenge.
  - b. Review all documents, directions, and procedures related to the election in question for conformity with the chapter's election rules and/or the CTA Elections Manual requirements.
  - c. Review the unit's bylaws and election standing rules for procedures and practices as they relate to the issues raised in the challenge.
  - d. Review the CTA Elections Manual for requirements that relate to the issues raised in the challenge that the chapter's governance documents do not address.
  - e. Fully and objectively interview the challenger.
  - f. Fully and objectively interview every witness identifies by the challenger.
    - g. Inquire and gather the names and contact information of the chapter members who could or do have insight into the elements of the challenge.
  - h. Analyze the issues of the challenge based on the unit's bylaws and election standing rules to determine if there is a violation.
  - i. Determine whether identifies violation(s) may have affected the outcome of the election.
  - j. Confirm that the resolution recommendations address each point raised by the challenger and that these recommendations have been reached in a fair and objective period.
  - k. Submit a written report including issues, findings, and recommendations to the chapter presidents and the Governance Boards within the same then (10) calendar day period
5. Any member of the Executive Board who was a candidate in a race that is challenged, or whose immediate family member is a candidate, shall recuse themselves from discussion of the voting on the challenge. If in the case where the majority of the Governance Board is unable to act on the challenge the decision shall move to the Representative Council.
6. The Executive Board shall act on the report no later than ten (10) calendar days following receipt of the written report of the elections committee in accordance with CTA Challenge Procedures as described in the CTA Challenge Procedures – Local/Service Center Council Elections of the *CTA Elections Manual*. The names of challengers and challenge forms shall remain confidential. The Executive Board must issue its decisions in writing to the challenger and the Elections Committee Chair.
7. If the Executive Board fails to act within twenty (20) calendar days of the initial challenge, the individual may file an appeal as described below by writing to the CTA President.
8. If either party wishes to appeal the decision of the unit's governance body, he/she may file an appeal in writing to the CTA Presidents within the (10) calendar days from the date of the decision of the unit's governance body. The appeal shall include the original challenge filed at the unit level, and additionally shall include the local Elections Committee report and the Executive Board's decision.

**N. Initiative Procedures**

The Active membership shall have the authority to make decisions on any matters affecting the Association or its activities through the initiative process.

An Active member shall file a notice of the intent to circulate a petition with the chapter president by including a copy of the petition to be circulated, and the names of at least three persons supporting the proposed measure and responsible for its circulation.

The chapter president shall register the receipt of the notice of the intent to circulate, and acknowledge such registration in writing with the member filing the notice.

The timeline for gathering signatures will commence the day that the notice of intent is registered. A maximum of fifteen (15) calendar days shall be permitted to obtain the signatures of at least sixty percent (60%) or more of the Active members of the chapter. The petition shall contain the question proposed to be placed on the ballot.

The circulators shall present to the chapter president the petition(s) containing original signatures.

The chapter president shall have thirty (30) calendar days in which to verify the membership of the signers of the petition.

If there are insufficient signatures, the petition circulator will be notified by mail within three (3) calendar days, that the petition failed for a lack of signatures.

The chapter president shall cause a ballot to be furnished to the members no less than fifteen (15) calendar days after verification of membership, provided that the period that school is officially not in session shall not be included in this count.

Regular election procedures (e.g., election of officers) shall be followed including voting times.

The proposal shall take effect immediately upon receipt of the required number of votes, unless otherwise specified.

#### **O. Referendum Procedures**

1. Any action or proposed action of the Representative Council or the Executive Board shall be referred to a vote of the Active membership upon two-thirds (2/3) vote of the referring body at any valid meeting.
2. The referendum action shall prescribe the exact wording of the question to be posed to the Active membership on the ballot.
3. The chapter president shall cause a ballot to be furnished to the members no less than fifteen (15) calendar days and no more than thirty (30) calendar days after action by the Executive Board, provided that the period that school is officially not in session shall not be included in this count.
4. Regular election procedures (e.g., election of officers) shall be followed including voting times.
5. The proposal shall take effect immediately upon receipt of the required number of votes, unless otherwise specified.

#### **P. Recall Procedures**

The Active membership shall have the authority to recall from office any person or persons having been elected thereto by the chapter's Active members.

1. Any Active member(s) desiring to recall a unit officer or other elected office holder must file a copy of a petition with the chairperson of the Elections Committee before it can be circulated.
2. The petition must include the following information:
  - a. Name of individual who is the subject of the recall;
  - b. Office of individual;
  - c. Date of Petitions;
  - d. Name(s) of person(s) filing petition;
  - e. Notation that "Each signature must be in ink"; and
  - f. Space must be provided for the printed name, signature, work site and date of signing for each name on the petition

3. Within fourteen (14) working days after receipt, the chairperson of the Elections Committee shall determine whether the petition contains the necessary information.
  - a. If the petition does not contain the necessary information, the Chairperson of the Election Committee shall so notify the petitioner(s).
  - b. If the petition contains the necessary information, the Chairperson of the Elections Committee shall inform the petitioner(s) of the rules, procedures and timeline (beginning date and deadline for gathering of signatures), and the need for protection of due process rights of the parties.
  - c. The Chairperson of the Elections Committee shall send written notification to the unit officer whose recall is being proposed and shall also notify the other officers of the unit. A copy of the petition shall be enclosed
  4. Monies from a unit's treasury or indirect contributions on the form of use of a unit's assets, facilities, staff, equipment, mailings, good will and credit, or in-kind services must not be used in the recall process.
  5. No unit may state or indicate its preference in the unit's newspaper, newsletter or communications to its members.
  6. The timeline for gathering of signatures will commence the day that the notice of intent is registered.
  7. A maximum of sixty (60) calendar days shall be permitted to obtain the signatures of at least twenty-five percent (25%) of the Active members of the chapter. If the person subject to the recall was not elected by the general membership, then the signature requirement is twenty-five percent (25%) of the members of the electing constituency.
  8. The signed petitions must be received by the chairperson of the Elections Committee by the specified deadline date.
  9. The Elections Committee shall have ten (10) calendar days after receipt of the petition to verify signatures.
  10. If there are insufficient signatures, the chairperson of the Elections Committee shall notify the petition circulator(s) by mail within five (5) calendar days of verifying the signatures that the petition failed for a lack of signatures.
  11. Immediately upon verification of the signatures, the chairperson of the Election Committee shall:
    - a. Notify the president/designee of the fact that a recall has been initiated.
    - b. Contact the CTA Elections & Credentials Chairperson through the Governance Support Department before proceeding.
  12. The chapter President, or the chapter Vice-President if the chapter President is the person being recalled, shall cause a ballot to be furnished to Active members no less than twenty (20) calendar days and no more than thirty (30) calendar days after verification of signatures. The period that school is officially not in session shall not be included in this count.
  13. The election must be concluded within fifteen (15) calendar days of distribution of the ballots.
  14. The election must be concluded with provisions for a secret ballot and voter sign-up sheets.
  15. The election shall be certified in accordance to the unit's bylaws.
  16. The Chairperson of the Elections Committee will deliver the report to the president of the unit who will immediately notify all interested parties of the election results. The election results shall be posted at each work site as soon as possible following the election.

#### **NEA/RA Election Guidelines**

An election by secret ballot may be waived by the executive board and the candidate(s) declared elected if, following a period of open nominations, the number of candidates is equal to or less than the number of delegate positions to be filled.

Successor delegates (alternates) are ranked in order of votes received. Results must be sent to the Service Center Council, which will forward the results to CTA. No write-in candidate shall be declared a winner unless the write-in candidate receives at least 10% of the legal ballots cast or more votes than one or more of the declared candidates.