CALIFORNIA TEACHERS ASSOCIATION

ELECTIONS MANUAL

AND REQUIREMENTS FOR CHAPTER ELECTION PROCEDURES

2014-15

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Edition

CTA
Elections Manual

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California Teachers Association

CTA Elections Manual

CTA Standing Rule 4-7

1. Publication and Scope.
The Board of Directors shall regularly publish a CTA Elections Manual containing rules, regulations and procedures for the following: *(Amended May 1991, September 2011)*

a. Elections by the State Council of Education for officers and directors.
b. Elections conducted within electoral districts for representation on the State Council of Education.
c. Elections conducted within electoral districts for representation to the NEA Representative Assembly.
d. Elections conducted by local affiliates of CTA (Adopted November 2004, Amended September 2011)

Pertinent sections of the Bylaws and Standing Rules related to elections are located at the end of the Elections Manual. (See Appendix T and Appendix U)

2. Elections and Credentials Committee Review.
The Elections and Credentials Committee shall continuously screen current election procedures for conformance to Association Bylaws, State Council policies, and other generally accepted standards for the conduct of elections, so as to provide the Board of Directors with recommended revisions to update the Elections Manual as needed. *(Amended May 1991)*

3. Incorporation into Standing Rules.
The Elections Manual shall have the same force and effect as this Standing Rule, and is hereby incorporated into this Rule by reference thereto.

4. Distribution.
Copies of the Elections Manual shall be distributed each year to all members of the State Council of Education at its first regular meeting, and sent to all presidents of chapters and affiliated organizations. Additional copies shall be available upon request at meetings of the State Council, and to other individuals with a pertinent interest, upon request to the Executive Director.

5. Limitations on Changes.
Pursuant to State Council policy, changes in the Elections Manual after September 1 of each year shall only be made after authorization by the State Council of Education.

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Election Credo

The right and responsibility of electing leadership and representation are the very cornerstone of a democratic society. Elections processes must be conducted in such a manner that voters and candidates alike can be assured that reasonable rules of ethical conduct and procedures have been adopted, and are followed both in spirit and in practice.

Election guidelines are necessary for fair campaign and election practices. Although no set of guidelines can anticipate every situation or serve perfectly in every crisis, both voters and candidates have serious responsibilities to make the democratic process work.

Each voter has the responsibility to become informed about candidates' experience, goals, and stands on issues, as well as exercise wisdom in voting for the best-qualified candidate.

The election procedures and processes addressed in this manual are presented with the intent to meet the highest standards for fair campaign and election practices within the California Teachers Association/NEA.

[Revised 9/00]

Election Terms You Need to Know

Total Ballots Cast – The total number of all ballots cast in an election.

Unused Ballots – Ballots which have not been cast. If there are any extra unused ballots, these should be kept separate from the voted ballots and not counted.

Blank Ballot – When no vote is marked for an office on a ballot that has been cast. Each office on a ballot is considered to be a separate election and the votes cast for each office are counted separately. If a voter does not vote for an office on a ballot containing multiple offices, it is considered a blank ballot for that office only. *See Figure 1 for an example of a blank ballot.*

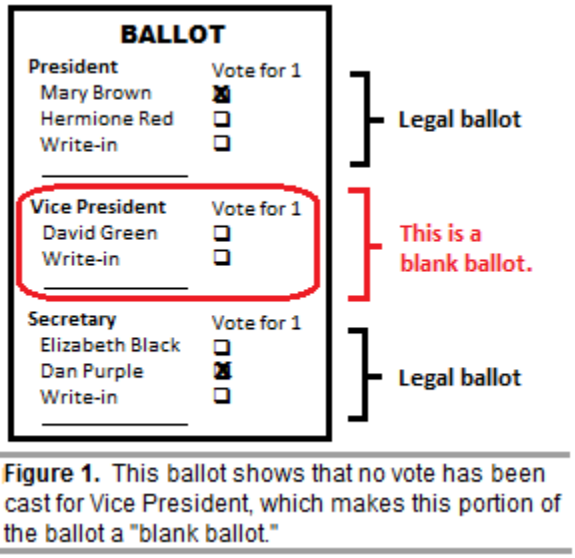

Figure 1. This ballot shows that no vote has been cast for Vice President, which makes this portion of the ballot a "blank ballot."

Illegal Ballots – Ballots or votes not counted due to a violation of an election rule/requirement. Violations include: 1) More ballots than signatures; 2) Ballot(s) submitted after deadline; 3) Voting envelopes without a signature; 4) Voter's intent unclear; 5) Votes cast for more than number allowed; 6) Votes cast for an ineligible candidate; 7) Votes cast for a fictional character.

Legal Ballots Cast – The total number of all ballots cast minus any blank and/or illegal ballots.

Write-in Vote – A vote cast clearly indicating the voter's choice of an eligible candidate whose name has been handwritten on the ballot along with a corresponding mark ("X", "✓", etc.) in the place provided for such votes.

Majority – "More than half."

Majority Vote – More than half of the votes cast by person legally entitled to vote, excluding blank or illegal ballots. For example:

- If 19 votes are cast, a majority (more than 9 ½) is 10.
- If 20 votes are cast, a majority (more than 10) is 11.
- If 21 votes are cast, a majority (more than 10 ½) is 11.

Plurality Vote – The greatest number of votes cast by persons legally entitled to vote, excluding blank or illegal ballots.

Run-off Election – A run-off election is conducted when no candidate achieves the required majority vote. A run-off election is conducted among the candidates receiving the highest number of votes. The names on the run-off ballot will be one more than the number of vacancies to be filled. There shall be no provisions for write-in candidates on a run-off ballot. A majority vote is required to win a run-off election.

Active members – Active membership shall be open to any person engaged in, or who is on a limited leave of absence from, non-administrative, non-evaluative, public education employment. All Active members shall be entitled to the privileges of membership as set forth within the Bylaws. A member who retires during a membership year but who has paid full active dues for that year shall have "Active" status until the end of that membership year.

Calendar Days – Any day on the calendar, Sunday through Saturday.

Ex Officio Voting Members – CTA Executive Officers, members of the CTA Board of Directors and members of the NEA Board of Directors.

Open Nomination – Whereby every eligible CTA member shall have the opportunity to nominate any CTA member who meets the qualifications for office.

Roster – List of eligible voters.

School Days – Any day, Monday through Friday, when students are in attendance at school.

Secret Ballot – The opportunity to vote in privacy.

Sign-in Sheet – List of eligible voters which includes a place for a signature.

[Revised 7/02, 6/06, 6/12, 6/13]

I. General Election Procedures for CTA Statewide Offices

I-1. Statewide Offices

The CTA statewide offices include: CTA President, CTA Vice President, CTA Secretary-Treasurer, CTA Directors At-Large, CTA/ABC Committee Members At-Large, CTA/NEA Coordinating Director, NEA Directors and NEA Alternate Directors.

I-2. Time Schedule for Announcements of Vacancies, Speeches, and Elections for Statewide Offices

1. The Chairperson of the Elections and Credentials Committee will announce at the appropriate State Council meeting the time schedule for elections for the following offices in the year when the term expires:

	State Council Meeting		
	Announcement of		Speeches
Office	**Vacancy**	**Candidates**	**& Election***
CTA President	1st	2nd	3rd
CTA Vice President	1st	2nd	3rd
CTA Secretary-Treasurer	1st	2nd	3rd
NEA Directors	1st	2nd	3rd
NEA Alternate Directors	2nd	3rd	4th
CTA/NEA Coordinating Director	2nd	3rd	4th
CTA Directors At-Large**	2nd	3rd	4th
CTA/ABC Comm. Members At-Large	2nd	3rd	4th

* Including run-off, when necessary

**Designated as permanent positions for ethnic minority persons

2. The Chairperson of the Elections and Credentials Committee will announce at the appropriate State Council meeting the names of the candidates, the polling location, the date of the election, and the requirement of majority vote to win.

I-3. Terms of Office for Statewide Offices

Office	**Term**	**Beginning Date**
CTA President	2 – 2 yr. Terms	June 26th
CTA Vice President	2 – 2 yr. Terms	June 26th
CTA Secretary-Treasurer	2 – 2 yr. Terms	June 26th
NEA Directors	2 – 3 yr. Terms	September 1st
NEA Alternate Directors	2 – 3 yr. Terms	September 1st
CTA/NEA Coordinating Director	Coincides with NEA Director term.	June 26th * *[Revised 6/04]*
CTA Directors At-Large **	3 – 3 yr. Terms	June 26th
CTA/ABC Comm. Members At-Large	3 – 3 yr. Terms	June 26th

* Effective date September 1, 2005

**Designated as permanent positions for ethnic minority persons

I-4. Qualifications for Statewide Offices

1. **For CTA and NEA Offices.**
   a. A candidate for CTA President, Vice President or Secretary-Treasurer must be an Active member of CTA, NEA and a chapter, if available.
   b. A candidate for CTA Directors At-Large or CTA/ABC Committee Members At-Large must be an Active member of CTA, NEA, a chapter (if available) and be a member of an ethnic minority group as defined in the CTA bylaws, and as self-identified in CTA membership records. *[Revised 6/10]*
   c. The ethnic minority categories as determined by NEA/CTA are African American, American Indian/Alaska Native, Asian/Pacific Islander, or Hispanic.
   d. A candidate for NEA Director or NEA Alternate Director must be an Active member of CTA and a chapter, if available, and an Active member of NEA for the past two years and be employed in the area to be represented. *[Revised 6/04]*

2. **For CTA/NEA Coordinating Director.**
   a. A candidate for CTA/NEA Coordinating Director must be an elected NEA Director for California.
   b. The term will commence on June 26th through June 25th of the year coinciding with the end of the NEA Director's term on the NEA Board of Directors.* *[Revised 6/04]*

   * The effective date of this provision is September 1, 2005.

I-5. Nominations for Statewide Offices

1. **Open Nominations.**
   a. Nominations for statewide offices shall be conducted according to the Open Nomination procedure. This procedure holds that every eligible CTA member shall have the opportunity to nominate any CTA member who meets the qualifications for office.
   b. In the event that there are no declaration of candidacy forms received for a position, the election shall be held with a write-in provision on the ballot for that position. *[Revised 6/14]*
2. **Nominations Procedure.**
   a. For CTA Officers, NEA Directors, or CTA/NEA Coordinating Director, a member shall file a declaration of candidacy with the Governance Support Department no later than fifteen (15) calendar days prior to the meeting at which names of candidates are announced to the State Council. (*See Appendix A)*
   b. For CTA/NEA Coordinating Director, any CTA member may nominate any person serving as a NEA Director for California.
   c. The Chairperson of the Elections and Credentials Committee shall announce the names of all candidates who have filed declarations of candidacy to the State Council.
   d. The President or designee shall then call for nominations from the State Council floor.
   e. Any person wishing to nominate a qualified member (who may be him/herself) shall do so by going to a microphone on the State Council floor, provided that prior consent of the nominee has been obtained. The nominee must complete a declaration of candidacy form for that office and return it to the CTA registration desk before the meeting at which he or she is nominated adjourns. *[Revised 6/10, 6/12]*
   f. The President or designee shall close nominations for each office before proceeding to the next office.
   g. In the event that only one nominee is presented for an office, the question of waiving the ballot shall be immediately placed before the State Council on a non-debatable basis.
   h. A two-thirds (2/3) vote shall be required to waive the ballot.
3. **Withdrawal of Nomination.**
   In order for his/her name not to appear on the ballot, any person withdrawing from candidacy may do so only by written request to the Chairperson of the Elections and Credentials Committee at State Council or c/o the Governance Support Department outside of State Council prior to the ballots being printed. *[Revised 6/13, 6/14]*

I-6. Campaigning for Statewide Offices

1. With the exception of the candidates for CTA President, CTA Vice President, and CTA Secretary-Treasurer, campaigning shall not begin until a vacancy has been announced at State Council.
2. Candidates for CTA President, CTA Vice President, and CTA Secretary-Treasurer may begin campaigning following the close of the last California Caucus meeting at the NEA RA. *[Revised 6/14]*
3. Following the announcement of the vacancy and after a candidate files the declaration of candidacy form for a statewide office and signs the *Candidates Non-Disclosure Agreement*, the Chairperson of the Elections and Credentials Committee shall provide a candidate packet consisting of the following materials:
   a. A CTA Campaigning 101 brochure.
   b. A list of eligible State Council voters and ex-officio voting members, with the last known address, telephone numbers and personal (non-school, non-association) email addresses. *[Revised 6/11]*
   c. A list of Service Center Council meeting dates and names, addresses, telephone numbers and personal (non-school, non-association) email addresses of Service Center Council Chairpersons. *[Revised 6/11]*
   d. A copy of the latest edition of the *CTA Elections Manual*.

e. A Financial Disclosure Report form.

[Revised 6/14]

4. All State Council members and/or those involved in a campaign must follow the *Rules for Ethical Conduct in Campaigning*. *(See Appendix O)* *[Revised 7/97, 6/14]*

5. **Campaign Tables.**
   a. Should a candidate wish to use a table for campaigning at a State Council meeting, s/he may do so by making a written request to the Governance Logistics Committee c/o the Governance Support Department no later than the regular CTA Board meeting immediately preceding the State Council meeting at which the table is being requested.
   b. Candidates for executive officer positions can have a table at all CTA sponsored events, including statewide conferences, except the Summer Institute, at which they can display one or more campaign posters, as deemed appropriate. *[Revised 7/14]*
   c. For all regional, SCC and local conferences, candidates may request to have a table and/or poster display by contacting the appropriate conference planning committee no later than the conference registration deadline. The placement of posters and tables will be determined by the respective conference planning committees. The conference planning committee shall treat all candidates the same.

   [Revised 4/99, 6/08, 6/14]

6. The candidate or the candidate's designee **must** notify the Service Center Council Chairperson in writing to request time on the Service Center Council meeting agenda at least five (5) calendar days prior to the meeting. *[Revised 6/14]*

7. In an election year, each Service Center Council will provide time for campaign speeches for statewide CTA offices of five (5) minutes, with a question and answer period after all speeches, not to exceed ten (10) minutes, when requested. *[Revised 6/14]*

8. A candidate visiting a Service Center Council for the purpose of campaigning shall report any campaign expense incurred for said visit.

I-7. Campaign Materials for Statewide Offices

1. **Content of Materials.** *[Revised 7/97]*
   a. All campaign flyers/materials printed on paper/posters or any campaign materials disseminated electronically, must include the following disclaimer, which must be stated verbatim: "The views and opinions expressed are those of the candidate and not necessarily those of CTA and NEA." The disclaimer is not required on buttons and stickers that are three (3) inches or smaller. *[Revised 6/14]*
   b. The use of any association logo shall not be allowed on campaign materials. *[Revised 7/96]*
   c. Materials printed in violation of this section will be pulled by the CTA Elections and Credentials Committee from displays and tables and distribution will cease until materials are corrected.

   [Revised 6/11, 6/13]

2. **Electronic Packet.** *(See Appendix E – Summary of Campaign Publications)*
   The candidate may provide CTA with an electronic flyer (PDF, Word Document, etc.) to be included in the State Council notice and electronic packet.
   a. Any flyer included in the State Council notice or electronic packet will be one (1) page, one (1) side only, and no larger than 8-1/2 by 11 inches. The flyer can either be in black and white or in color.
   b. The flyer must be received by the Chairperson of the Elections and Credentials Committee c/o the Governance Support Department no later than 5:00 p.m. on the tenth (10th) calendar day after the State Council meeting in which the names of the candidates were announced to the State Council. This will ensure inclusion in the appropriate State Council notice and electronic packet. *[Revised 6/14]*

   [Revised and renumbered 6/13]

3. **Distribution of Campaign Materials.** *[Revised 7/97]*
   a. All candidates shall have an opportunity to distribute campaign materials at Service Center Council meetings. If a candidate cannot attend a SCC meeting, the candidate or the candidate's designee may send campaign materials to the SCC Chair, who will ensure the campaign materials are distributed at the SCC meeting. *[Revised 6/14]*

b. All candidates shall have an opportunity to distribute campaign materials at the State Council meetings.
   1. The distribution of campaign flyers will be limited to committee/caucus meeting rooms and candidate table area.
   2. Any and all campaigning, electronic or otherwise, will be prohibited inside the ballroom during the general session and right outside the ballroom (in the ballroom pre-convene area). *[Revised 6/12]*
   3. Any form of electronic campaigning, such as social networking sites (e.g., Facebook, Twitter, etc.), text messaging, robocalls, and emails, sent or set to be received during any State Council general session is strictly prohibited. *[Revised 6/11, 6/12]*

4. **Articles in Official Publication of CTA.**
   a. Candidates for CTA President, CTA Vice President and CTA Secretary-Treasurer shall have an opportunity to submit an article for publication in the official publication of CTA, which shall appear between the second and third State Council meetings.
   b. The article may not exceed 400 words and may include a photograph.
   c. The article, typewritten and double-spaced, must be submitted to the Chairperson of the Elections and Credentials Committee c/o the Governance Support Department. It may be submitted in an electronic read only format in addition to a signed hard copy. The deadline for submission of articles and photos shall be coordinated with the deadlines of CTA's official publication. *[Revised 6/14]*
   d. The candidate must sign the article.

5. **Campaign Limitations**.
   a. Statewide Conferences. Candidates will only be allowed to display one campaign poster at the CTA Issues, Equity and Human Rights, GLBT, Good Teaching conferences and the Summer Institute. The placement of posters will be determined by the respective conference planning committees. Poster requests shall be submitted in writing to the Governance Logistics Committee c/o the Governance Support Department no later than the regular board meeting immediately preceding the event. See exception for executive officer candidates in Section I-6.5(b). *[Revised 6/10, 6/12, 6/14]*
   b. Technology. Candidates cannot campaign on any affiliated chapter/service center social networking sites created for association/leadership members to communicate with each other.
   c. Use of Unit Resources. A candidate cannot use the official logo of the unit or official Association title in a way that suggests that the candidate has the support of the unit, CTA or any of its affiliates. This prohibition includes candidate email addresses.
   d. District email addresses and/or electronic systems shall not be used for campaigning. *[Revised 6/12, 6/14]*

6. **Campaign Violations.**
   Campaign complaints must be filed by the complaining party with the CTA Elections Chairperson and reported on the Campaign Violation Complaint Form, which is located in *Appendix N* of this manual, within forty-eight (48) hours of becoming aware of the violation to be considered by the CTA Elections Committee. This form can only be used prior to the election taking place. Once an election has been held a challenge must be filed. (*See Sections I-15 and II-13 of this CTA Elections Manual*)

I-8. Financial Limitations and Disclosure for Statewide Offices

1. **Income.**
   a. Only contributions from CTA members shall be accepted.
   b. Candidates may not accept direct or indirect contributions from CTA or its chapters.
   c. Contributions from a CTA member may not exceed $100. *[Revised 7/96]*
   d. There shall be no limitation on the amount contributed by the candidate.

2. **Monies from Chapters.**
   a. Monies received by a chapter by way of dues, assessment, or similar levy must not be applied to promote a candidate.
   b. Candidates may not accept direct contributions from a chapter's assets, facilities, staff, equipment, mailings, good will and credit; nor may a chapter state or indicate its preference for a candidate in the chapter's publications.

c. However, if a chapter regularly reports actions of its governing body, it may include an endorsement action within such a report.

3. **Campaign Income.**
   a. Campaign income is defined as financial contributions and goods and/or in-kind services made available to the candidate.
   b. No labor organization (including CTA and its affiliates) or private sector employer (including commercial firms and business) may contribute money, in-kind goods, services, or anything of value, directly or indirectly, to promote the candidacy of any individual for CTA office.

4. **Campaign Expenses.**
   a. Campaign expense categories include:
      1. Travel: A trip having as its major purpose campaigning to seek political support;
      2. Telephone: Toll call charges related to campaigning;
      3. Postage: Cost to mail material directly related to campaigning;
      4. Receptions: Social occasions given for the purpose of campaigning;
      5. Campaign Materials: Printing, paper, photography, posters, flyers, buttons, (but not limited to items listed);
      6. Substitute's Pay: Cost of providing a substitute when the candidate takes release time to campaign;
      7. Other: Any item related to the campaign not fitting the above categories.
   b. Campaign expenses include:
      1. Costs connected with printing material that directly advances the position of the candidate;
      2. Mailing of campaign material;
      3. Operation of hospitality suites during the campaign year whether such suites are funded by the candidate or by supporters;
      4. Other entertainment designed to advance the candidate's campaign;
      5. Expenditures of the official campaign committee, including travel, lodging and meals;
      6. Giveaways, e.g., buttons, pencils, etc.;
      7. Items used to solicit voluntary contributions;
      8. Monies spent to purchase any item(s) for raffle, lottery, or similar activity.

5. **Expenditure Cap.** There shall be no cap on the amounts that may be spent by a candidate in campaigning for a statewide office.

6. **Financial Disclosure Report.** *(See Appendix B)*
   Each candidate for office shall submit a financial disclosure report listing all income and expenses. The Financial Disclosure Report must be submitted to the Chairperson of the Elections and Credentials Committee c/o the Governance Support Department no later than thirty (30) calendar days after the election. *[Revised 6/14]*

7. **Financial Summary.**
   The Chairperson of the Elections and Credentials Committee shall prepare a summary (totals for each category on the Final Financial Disclosure Report) of campaign income and expenses for each candidate for all statewide offices to be included in the appropriate State Council electronic packet and to be available upon request. *[Revised 6/13]*

I-9. Candidate Receptions for Statewide Offices

1. Each candidate may arrange for a reception for the purpose of campaigning.
2. The candidate shall be responsible for all reception details.
3. Complimentary Executive Officer suites shall be used for CTA official business only and shall not be used to promote the candidacy of a particular individual in CTA elections.

I-10. Speeches by Candidates for Statewide Offices

1. **Service Center Councils.**
   a. In an election year, each Service Center Council will provide time for campaign speeches when requested.
   b. The order of the campaign speeches shall be determined by using the CTA alphabet and the candidates' last names. *[Revised 6/14]*
   c. Each candidate for statewide CTA office, or their designee, will be allowed five (5) minutes for a speech. *[Revised 6/14]*

d. The agenda shall include a question and answer period after all speeches not to exceed ten (10) minutes.

2. **State Council.**

a. The order of the campaign speeches shall be determined by using the CTA alphabet and the candidates' last names.

b. The length of time for combined campaign speeches, which includes the introduction and candidate's speech, shall not be more than the following:

Office	***Minutes***
CTA President	10
CTA Vice President	5
CTA Secretary-Treasurer	5
NEA Directors & Alternate Directors	5
CTA Director At-Large	5
CTA/ABC Committee Member At-Large	5
CTA/NEA Coordinating Director	5

c. The Chairperson of the Elections and Credentials Committee will appoint a timekeeper from among members of the Committee.

d. The timekeeper shall give each speaker a one-minute warning before the time has elapsed.

e. When the time limit is up, the timekeeper will stand.

f. A candidate for office who has an opportunity to speak to the State Council in a general session shall not be permitted to appear at a directorial district caucus other than his/her own; however, in the event of a run-off election, each candidate shall be provided an opportunity to speak up to one minute at each directorial district caucus.

I-11. Voting Procedures for Statewide Offices

1. **Polling Time.**

a. The polling date, hours and location shall be announced by the Chairperson of the Elections and Credentials Committee at the opening session of the State Council meeting at which an election will be held.

b. The polls shall be open for at least one and one-half (1-1/2) hours during the General Assembly lunch recess. *[Revised 7/97]*

2. **Printing of Ballots.**

a. The names of candidates on the ballot shall be listed according to the CTA alphabet for the year. *(See Appendix C)*

b. CTA shall be responsible for the printing of all ballots on which State Council members shall vote.

c. Ballots shall be printed for each election.

d. Ballots and/or instruction sheets for officer and director elections shall be prepared with the names of candidates listed.

e. A candidate shall have his/her name listed on the ballot and/or instruction sheet as indicated on the declaration of candidacy form.

f. When a candidate's last name is hyphenated, the name before the hyphen shall be used for placement on the ballot and/or instruction sheet.

g. Candidates' names on the ballot and/or instruction sheet shall be limited to twenty-six (26) characters, including spaces, hyphens, and other punctuation marks.

h. Space shall be provided for write-ins.

i. The ballot and/or instruction sheet for CTA President and CTA Vice President shall state that the successful candidates will also serve as the chairperson and vice chairperson of the California Caucus at the NEA Representative Assembly.

3. **Eligibility of Voters.** *(See Appendix F)* *[Revised 7/97]*

a. Members of the State Council who have been elected by a direct vote of the membership shall be eligible to vote in State Council elections. A list of duly certified voting State Council members and duly certified Alternates shall be prepared.

b. Alternates must register with the CTA Registration desk no later than noon on the first day of each State Council meeting. The name(s) will then be given to the Chairperson of the Elections and Credentials Committee.

c. All State Council Representatives from electoral districts qualify to vote for candidates for the NEA Board of Directors.
d. CTA Board of Directors who retain his/her State Council seat are considered to still be elected by the active members and eligible to vote for candidates of the NEA Board of Directors.

4. **Observers.**
   a. Each candidate may designate one representative to observe the voting process.
   b. The name of the observer shall be submitted in writing to the Chairperson of the Elections and Credentials Committee prior to the opening of the polls.
   c. The observer shall not interfere with the work of the Elections and Credentials Committee and must remain in the Election room until the results are posted.
   d. Electronic devices of any kind (cell phone, computer, tablet, etc.) are not allowed in the counting area. *[Revised 6/13]*

5. **Voting.**
   a. Each voter must wear the State Council badge issued for the meeting at which the election is held.
   b. No campaign materials, clothing, or jewelry will be permitted in the polling place. *[Revised 6/05]*
   c. No campaigning shall occur in or around the polling place, or with individuals in line to vote.
   d. No food or drink will be permitted in the polling place while voting is in progress.
   e. Each voter must sign the voter roster after his/her name before receiving a ballot from the Elections and Credentials Committee. *[Revised 7/97]*
   f. Alternates must sign his/her name after the name of the person he/she is replacing.
   g. A ballot marked in error shall be returned to the Chairperson of the Elections and Credentials Committee who shall mark it "Void" and sign the ballot before issuing a replacement ballot.
   h. Every effort shall be made to ensure that the voter is able to mark his/her ballot in secrecy.
   i. The voter shall place his/her marked ballot into the voting machine.

6. **Vote Requirements.**
   a. A majority vote of the ballots cast shall be required to win the election for officer or director. A majority vote shall be more than half of the votes cast by persons legally entitled to vote, excluding blank or illegal ballots, for each office.
   b. In the event that no candidate receives a majority vote on the first ballot, a run-off election shall be held.
   c. The candidates in the run-off election shall be the candidates receiving the two (2) highest numbers of votes on the first ballot.
   d. There shall be no provisions for write-in candidates in run-off elections. A majority vote is required to win a run-off election. *[Revised 6/13]*

7. **Counting of Ballots.**
   a. The Elections and Credentials Committee shall count the ballots in the designated Election room.
   b. The Chairperson of the Elections and Credentials Committee shall prepare the Official CTA State Council Teller's Report which shall be signed by the members of the Elections and Credentials Committee. *(See Appendix G)*
   c. Immediately following the completion of the Teller's Report, the results of the balloting shall be given to the President to announce.
   d. If the State Council is in recess, the results shall be posted.
   e. A copy of the signed voter roster shall be posted.
   f. The President or designee shall announce the results of the election to the State Council as soon as possible.

I-12. Run-off Procedures for Elections by State Council for Statewide Office

If a candidate does not receive a majority vote, a run-off election shall be conducted between 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. *[Revised 7/03]*

1. Names of the candidates shall be listed in the order of the CTA alphabet.
2. The Elections and Credentials Committee shall issue ballots in the same manner as prescribed for the first election.
3. The Elections and Credentials Committee shall count the ballots.

4. The Chairperson of the Elections and Credentials Committee shall prepare the Official CTA State Council Teller's Report, which shall be signed by the members of the Elections and Credentials Committee.
5. Immediately following the completion of the Teller's Report, the results of the balloting shall be given to the President to announce.
6. If the State Council is in recess, the results shall be posted.
7. A copy of the signed voter roster shall be posted.
8. The President or designee shall announce the results of the election to the State Council as soon as possible.
9. If the run-off election results in a tie vote, the election procedure for a run-off election shall be repeated immediately.

I-13. Custody of Ballots for Statewide Offices

1. The Chairperson of the Elections and Credentials Committee has custodial responsibility of all ballots, which will be retained in the Governance Support Department. *[Revised 7/97]*
2. After the tallying and recording of ballots have been completed, all voted and unused ballots shall be returned by the Chairperson of the Elections and Credentials Committee to the staff consultant who shall arrange to have the ballots retained for at least one (1) year.

I-14. Procedures for State Council Election Completion By Mail Ballot

In the event that the required number of elections, including run-offs, at any State Council meeting exceeds the amount of time available in which to complete them, the final ballot shall be submitted to mail ballot for handling, within the following general guidelines:

1. These procedures shall be handled by the Elections and Credentials Committee.
2. Only those representatives registered at the State Council meeting during which the election was held shall be eligible to vote.
3. The Elections and Credentials Committee shall prepare ballots as well as two return envelopes and mail them to the last known home address of the representatives.
   a. The outside envelope shall contain prepaid postage, along with the name and address of the representative and a place for verification signature of the representative.
   b. The inside envelope shall contain no markings.
4. In the letter of instructions to those who are to vote in the election, the Elections and Credentials Committee shall specify the final date for receipt of the ballot by the CTA Elections and Credentials Committee.
5. The Elections and Credentials Committee shall make provisions for a representative to request and receive a replacement ballot if that representative does not receive his/her original ballot by a specific date.
6. The ballots shall be returned to a special post office box selected for the election.
7. At an announced time, subsequent to the time designated for final receipt of the ballots, the Elections and Credentials Committee will conduct the vote count.
   a. The Elections and Credentials Committee will determine validity by checking each outer envelope against the official list of representatives eligible to vote.
   b. Once eligibility has been verified, the Elections and Credentials Committee will open each outer envelope and remove its inner envelope and mix all inner envelopes.
   c. The Elections and Credentials Committee will then open all inner envelopes and count the ballots.
   d. Following the count, the Elections and Credentials Committee shall transmit the final results to the CTA President. The Elections and Credentials Committee shall retain the ballots for one (1) year in the Governance Support Department.
8. Any candidate in the election may appoint an observer to be present at steps 3 and 7 of the procedure. *[Revised 7/96]*

I-15. Challenge Procedures for Statewide Office Elections

Any State Council member, candidate, or observer designated by a candidate who observes any irregularity must report in writing to the Chairperson of the Elections and Credentials Committee according to the following: *[Revised 6/98]*

1. **Eligibility of Voters.**
   a. Challenges to the eligibility of voters in CTA elections must be filed in writing with the Chairperson of the Elections and Credentials Committee no later than one-half (1/2) hour before the printed time of the convening of the general session of the State Council that immediately precedes the election.
   b. The Elections and Credentials Committee shall conduct such fact-finding as is possible and report the circumstances to the State Council, whose decision as to acceptance of such challenge shall be final, prior to the holding of the election.
2. **Voting Procedures.**
   a. Challenges to the voting procedure, counting, and tallying must be filed in writing with the Chairperson of the Elections and Credentials Committee within one (1) hour after the results are posted.
   b. The Chairperson of the Elections and Credentials Committee shall inform the CTA President of the filing of the challenge.
   c. The CTA President may request the Elections and Credentials Committee to conduct an investigation and to report back to the President within one (1) hour.
   d. The President shall report to the State Council on the day of the election.
   e. The State Council may either void the election and order another one, or may confirm the election.
3. **CTA Elections Manual Regulations.**
   a. Any alleged violation of the *CTA Elections Manual* regulations must be reported to the Chairperson of the Elections and Credentials Committee no later than ten (10) calendar days after the Financial Disclosure Report summary has been distributed. *[Revised 7/96]*
   b. The report/challenge must be supported by *prima facie* evidence of a violation, i.e., evidence which is sufficient on its face to support the fact until it is contradicted and overcome by other evidence.
   c. Names and addresses of parties who can give evidence shall be included with the report.
   d. Upon receipt of a challenge, the Elections and Credentials Committee shall determine whether:
      1. The challenge alleges a violation of a CTA election requirement; and
      2. The challenge is supported by appropriate documentation.
   e. The Elections and Credentials Committee will give immediate notice to the Board of Directors of its intent to conduct an investigation.
   f. The Elections and Credentials Committee shall take such steps as it deems appropriate in order to prepare for the State Council a written report of the relevant facts regarding the challenge, and whether the violation(s) may have affected the outcome of the election, and a recommendation as to its disposition.
   g. In the event the State Council is not in session, the Elections and Credentials Committee will give its report to the Board of Directors within forty-five (45) calendar days of receipt of the challenge.

I-16. Counting a Standing Vote of the State Council

1. When the President calls for the counting of a standing vote of the State Council, the Elections and Credentials Committee shall count the votes of only those State Council members who are wearing badges and who are standing in front of chairs designated for State Council members.
2. In the event that the Elections and Credentials Committee is not available to count standing votes, the President shall appoint members of the CTA Board of Directors to serve.

I-17. Campaign Violation Complaint

Upon receipt of a Campaign Violation Complaint Form, the Elections and Credentials Committee will initiate an investigation. If upon investigation the Committee determines that a violation has occurred, the Elections and Credentials Committee Chair will announce through the next General Session Elections Committee Report the nature of the violation committed by the specific campaign. *[Revised 6/12]*

I-18. Vacancies in Statewide Offices Elected by State Council

1. In the event a vacancy should occur in a statewide office elected by the State Council, the Chairperson of the Elections and Credentials Committee shall announce that a special election shall be held at the next regular State Council meeting to fill the vacancy.
2. If there are at least five (5) weeks before the next regular State Council meeting, the announcement may be made by mail.
3. Chapter presidents will be notified by mail of the opportunity to file declarations of candidacy for the vacant offices that will be voted on at the next State Council meeting.
4. The regular procedure shall be followed, except as follows:
   a. At the next State Council meeting, nominations and acceptance speeches shall be given.
   b. Nominations may be made from the floor, provided that prior written consent of the nominee has been obtained.
   c. The election shall be held at the same meeting.
   d. The run-off election, if necessary, shall be held at the same meeting.
5. The financial limitations will be the same as those listed for the position that has the vacancy.
6. The qualifications are the same as those listed for the position which has the vacancy.
7. The length of speeches are the same as that listed for the position which has the vacancy.
8. Since nominations and voting are completed at the same meeting, the Association shall not print or distribute campaign material.

I-19. CTA/NEA Coordinating Director, Vacancy/Term

Whenever a vacancy occurs in the separate office of NEA Director serving on the CTA Board of Directors, a special election shall be held. The State Council shall elect one of the California NEA State Directors to be seated as a regular voting member of the CTA Board of Directors for the remainder of his/her current elected term as NEA State Director.

I-20. Other

The most recent edition of *Robert's Rules of Order, Revised,* shall govern election procedures, except as specified in this *CTA Elections Manual.*

II. General Election Procedures for CTA Geographical District Offices

II-1. Geographical District Offices.

The CTA geographical district offices include: CTA Board Member and CTA/ABC Committee Member.

II-2. Time Schedule for Announcements of Vacancies, Speeches, and Elections for Geographical District Offices

1. The Chairperson of the Elections and Credentials Committee will announce at the appropriate State Council meeting the time schedule for elections for the following offices in the year when the term expires:

	State Council Meeting		
Office	Announcement of Vacancy	Candidates	Speeches & Election*
CTA Board Member	2nd	3rd	4th
CTA/ABC Committee Member	2nd	3rd	4th

* Including run-off, when necessary

2. The Chairperson of the Elections and Credentials Committee will announce at the appropriate State Council meeting the names of the candidates, the polling location, the date of the election, and the requirement of majority vote to win.

II-3. Terms of Office for Geographical District Offices

Office	Term	Beginning Date
CTA Board Member	3 – 3 yr. Terms	June 26th
CTA/ABC Committee Members	3 – 3 yr. Terms	June 26th

II-4. Qualifications for Geographical District Offices

A candidate for CTA Board Member or CTA/ABC Committee Member must be an Active member of CTA, NEA and a chapter, if available. The candidate's place of educational service must be within the boundaries of the directorial district.

II-5. Nominations for Geographical District Offices

1. **Open Nominations.**
   a. Nominations for geographical district offices shall be conducted according to the Open Nomination procedure. This procedure holds that every eligible CTA member shall have the opportunity to nominate any CTA member who meets the qualifications for office.
   b. In the event that there are no declaration of candidacy forms received for a position, the election shall be held with a write-in provision on the ballot for that position. *[Revised 6/14]*
2. **Filing Procedure.**
   For CTA Board Member or CTA/ABC Committee Member, a member shall file a declaration of candidacy with the Governance Support Department no later than fifteen (15) calendar days prior to the meeting at which names of candidates are announced to the State Council. *(See Appendix A)*
3. **Withdrawal of Candidacy.**
   In order for his/her name not to appear on the ballot, any person withdrawing from candidacy may do so only by written request to the Chairperson of the Elections and Credentials Committee at State Council or c/o the Governance Support Department outside of State Council prior to the ballots being printed. *[Revised 6/13, 6/14]*

II-6. Campaigning for Geographical District Offices

1. With the exception of the candidates for CTA President, CTA Vice President, and CTA Secretary-Treasurer, campaigning shall not begin until a vacancy has been announced at State Council.
2. Following the announcement of the vacancy, and after a candidate files the declaration of candidacy form for a geographical district office and signs the *Candidates Non-Disclosure Agreement*, the Chairperson of the Elections and Credentials Committee shall provide a candidate packet consisting of the following materials:
   a. A CTA Campaigning 101 brochure.
   b. A list of eligible State Council voters and ex-officio voting members, with the last known address, telephone numbers, and personal (non-school, non-association) email addresses.

[Revised 6/11]

c. A list of Service Center Council meeting dates and names, addresses, telephone numbers and personal (non-school, non-association) email addresses of Service Center Council Chairpersons. *[Revised 6/11]*
d. A copy of the latest edition of the *CTA Elections Manual*.
e. A Financial Disclosure Report form.

[Revised 6/14]

3. All State Council members and/or those involved in a campaign must follow the *Rules and Ethical Conduct in Campaigning*. *(See Appendix O)* *[Revised 7/97, 6/14]*
4. **Campaign Tables.**
   a. Should a candidate wish to use a table for campaigning at a State Council meeting, s/he may do so by making a written request to the Governance Logistics Committee c/o the Governance Support Department no later than the regular CTA Board meeting immediately preceding the State Council meeting at which the table is being requested.
   b. For all regional, SCC, and local conferences, candidates may request to have a table and/or poster display by contacting the appropriate conference planning committee no later than the conference registration deadline. The placement of posters and tables will be determined by the respective conference planning committees. The conference planning committee shall treat all candidates the same.

[Revised 4/99, 6/08, 6/14]

5. The candidate or the candidate's designee **must** notify the Service Center Council Chairperson in writing to request time on the Service Center Council meeting agenda at least five (5) calendar days prior to the meeting. *[Revised 6/14]*
6. In an election year, each Service Center Council will provide time for campaign speeches for geographical district offices of five (5) minutes, with a question and answer period after all speeches, not to exceed ten (10) minutes, when requested. *[Revised 6/14]*
7. A candidate visiting a Service Center Council for the purpose of campaigning shall report any campaign expense incurred for said visit.

II-7. Campaign Materials for Geographical District Offices

1. **Content of Materials.** *[Revised 7/97]*
   a. All campaign flyers/materials printed on paper/posters or any campaign materials disseminated electronically, must include the following disclaimer, which must be stated verbatim: "The views and opinions expressed are those of the candidate and not necessarily those of CTA and NEA." The disclaimer is not required on buttons and stickers that are three (3) inches or smaller. *[Revised 6/14]*
   b. The use of any association logo shall not be allowed on campaign materials.
   c. Materials printed in violation of this section will be pulled by the CTA Elections and Credentials Committee from displays and tables and distribution will cease until materials are corrected.

[Revised 7/96, 6/13]

2. **Electronic Packet.** *(See Appendix E – Summary of Campaign Publications)*
   The candidate may provide CTA with an electronic flyer (PDF, Word Document, etc.) to be included in the State Council notice and electronic packet.
   a. Any flyer included in the State Council notice or electronic packet will be one (1) page, one (1) side only, and no larger than 8-1/2 by 11 inches. The flyer can either be in black and white or in color.
   b. The flyer must be received by the Chairperson of the Elections and Credentials Committee c/o the Governance Support Department no later than 5:00 p.m. on the tenth (10th) calendar day after the State Council meeting in which the names of the candidates were announced to the State Council to ensure inclusion in the appropriate State Council notice and electronic packet.

[Revised and renumbered 6/13]

3. **Distribution of Campaign Materials.** *[Revised 7/97]*
   a. All candidates shall have an opportunity to distribute campaign materials at Service Center Council meetings. If a candidate cannot attend a SCC meeting, the candidate or the candidate's designee may send campaign materials to the SCC Chair, who will ensure the campaign materials are distributed at the SCC meeting. *[Revised 6/14]*

b. All candidates shall have an opportunity to distribute campaign materials at the State Council meetings.
   1. The distribution of campaign flyers will be limited to committee/caucus meeting rooms and candidate table area.
   2. Any and all campaigning, electronic or otherwise, will be prohibited inside the ballroom during the general session and right outside the ballroom (in the ballroom pre-convene area).
   3. Any form of electronic campaigning, such as social networking sites (e.g. Facebook, Twitter, etc.), text messaging, robocalls, and emails, sent or set to be received during any State Council general session is strictly prohibited. *[Revised 6/12]*

4. **Campaign Limitations**.
   a. Statewide Conferences. Candidates will only be allowed to display one campaign poster at the CTA Issues, Equity and Human Rights, GLBT, Good Teaching conferences and the Summer Institute. The placement of posters will be determined by the respective conference planning committees. Poster requests shall be submitted in writing to the Governance Logistics Committee c/o the Governance Support Department no later than the regular board meeting immediately preceding the event. *[Revised 6/12, 6/14]*
   b. Technology. Candidates cannot campaign on any affiliated chapter/service center social networking sites created for association/leadership members to communicate with each other. *[Revised 6/10]*
   c. Use of Unit Resources. A candidate cannot use the official logo of the unit or official Association title in a way that suggests that the candidate has the support of the unit, CTA or any of its affiliates. This prohibition includes candidate email addresses. *[Revised 6/10]*
   d. District email addresses and/or systems shall not be used for campaigning. *[Renumbered 6/14]*

5. **Campaign Violations.** Campaign complaints must be filed by the complaining party with the CTA Elections and Credentials Committee Chairperson and reported on the Campaign Violation Complaint Form, which is located in *Appendix N* of this manual, within forty-eight (48) hours of becoming aware of the violation to be considered by the CTA Elections and Credentials Committee. This form can only be used prior to the election taking place. Once an election has been held a challenge must be filed. (*See Sections I-15 and II-13 of this CTA Elections Manual*) *[Revised 6/11]*

II-8. Financial Limitations and Disclosure for Geographical District Offices

1. **Income.**
   a. Only contributions from CTA members shall be accepted.
   b. Candidates may not accept direct or indirect contributions from CTA or its chapters.
   c. Contributions from a CTA member may not exceed $100. *[Revised 7/96]*
   d. There shall be no limitation on the amount contributed by the candidate.

2. **Monies from Chapters.**
   a. Monies received by a chapter by way of dues, assessment, or similar levy must not be applied to promote a candidate.
   b. Candidates may not accept direct contributions from a chapter's assets, facilities, staff, equipment, mailings, good will and credit; nor may a chapter state or indicate its preference for a candidate in the chapter's publications.
   c. However, if a chapter regularly reports actions of its governing body, it may include an endorsement action within such a report.

3. **Campaign Income.**
   a. Campaign income is defined as financial contributions and goods and/or in-kind services made available to the candidate.
   b. No labor organization (including CTA and its affiliates) or private sector employer (including commercial firms and business) may contribute money, in-kind goods, services, or anything of value, directly or indirectly, to promote the candidacy of any individual for CTA office.

4. **Campaign Expenses.**
   a. Campaign expense categories include:
      1. Travel: A trip having as its major purpose campaigning to seek political support;
      2. Telephone: Toll call charges related to campaigning;

3. Postage: Cost to mail material directly related to campaigning;
4. Receptions: Social occasions given for the purpose of campaigning;
5. Campaign Materials: Printing, paper, photography, posters, flyers, buttons, (but not limited to items listed);
6. Substitute's Pay: Cost of providing a substitute when the candidate takes release time to campaign;
7. Other: Any item related to the campaign not fitting the above categories.

b. Campaign expenses include:
1. Costs connected with printing material that directly advances the position of the candidate;
2. Mailing of campaign material;
3. Operation of hospitality suites during the campaign year whether such suites are funded by the candidate or by supporters;
4. Other entertainment designed to advance the candidate's campaign;
5. Expenditures of the official campaign committee, including travel, lodging and meals;
6. Giveaways, e.g., buttons, pencils, etc.;
7. Items used to solicit voluntary contributions;
8. Monies spent to purchase any item(s) for raffle, lottery, or similar activity.

5. **Expenditure Cap.** There shall be no cap on the amounts that may be spent by a candidate in campaigning for a geographical district office.

6. **Financial Disclosure Report.** *(See Appendix B)*
Each candidate for office shall submit a financial disclosure report, listing all income and expenses. The Financial Disclosure Report must be submitted to the Chairperson of the CTA Elections and Credentials Committee c/o the Governance Support Department no later than thirty (30) calendar days after the election. *[Revised 6/14]*

7. **Financial Summary.**
The Chairperson of the Elections and Credentials Committee shall prepare a summary (totals for each category on the Final Financial Disclosure Report) of campaign income and expenses for each candidate for all geographical district offices to be included in the appropriate State Council electronic packet and to be available upon request. *[Revised 6/13]*

II-9. Candidate Receptions for Geographical District Offices

1. Each candidate may arrange for a reception for the purpose of campaigning.
2. The candidate shall be responsible for all reception details.
3. Complimentary Executive Officer suites shall be used for CTA official business only and shall not be used to promote the candidacy of a particular individual in CTA elections.

II-10. Speeches by Candidates for Geographical District Offices

1. **Service Center Councils.**
a. In an election year, each Service Center Council will provide time for campaign speeches when requested.
b. The order of the campaign speeches shall be determined by using the CTA alphabet and the candidates' last names. *[Revised 6/14]*
c. Each candidate for geographical district office, or their designee, will be allowed five (5) minutes for a speech.
d. The agenda shall include a question and answer period after all speeches not to exceed ten (10) minutes.

2. **State Council.**
a. The order of the campaign speeches shall be determined by using the CTA alphabet and the candidates' last names.
b. The length of time for combined campaign speeches, which includes the introduction and candidate's speech, shall not be more than the following:

Office	***Minutes***
CTA Board Member	5
CTA/ABC Committee Member	5

c. The Chairperson of the Elections and Credentials Committee will appoint a timekeeper from among members of the Committee.

d. The timekeeper shall give each speaker a one-minute warning before the time has elapsed.
e. When the time limit is up, the timekeeper will stand.
f. A candidate for office who has an opportunity to speak to the State Council in a general session shall not be permitted to appear at a directorial district caucus other than his/her own.
g. In the event of a run-off election, each candidate shall be provided an opportunity to speak up to one minute at each directorial district caucus.

II-11. Caucus Procedures for Geographical District Office Elections

1. **Caucus Nominations (3rd Meeting).**
   a. A member of the CTA Elections and Credentials Committee shall chair the directorial caucus.
   b. The chairperson shall announce to the caucus the names of candidates who have filed declarations of candidacy as specified in this *CTA Elections Manual. (See Appendix F)*
   c. The chairperson shall call for other written nominations from the floor of any CTA member for CTA Director or CTA/ABC Committee Member, provided the nominator and nominee are Association members and the nominee has given written consent.
   d. Nominations from the caucus shall be declared closed. *[Revised 6/12]*
   e. After the election has been completed in the caucus and the results announced to the caucus, any person wishing to nominate a qualified person (who may be him/herself) shall do so by presenting, in writing, the name of the nominee to the Chairperson of the Elections and Credentials Committee prior to the Elections and Credentials Committee report to Council. *[Revised 6/12]*
2. **Speeches by Candidates for Caucus Nominee (3rd Meeting).**
   a. A member of the Elections and Credentials Committee shall chair the directorial caucus.
   b. The chairperson shall appoint a timekeeper.
   c. Campaign speech(es) shall be given by a supporter and/or by the candidate in the CTA alphabetical order of the last name of candidate(s).
   d. The combined speeches shall be limited to five (5) minutes per candidate.
   e. A question and answer period of no more than ten (10) minutes may be held after all speeches are completed.
3. **Voting to Elect the Caucus Nominee (3rd Meeting).**
   a. Ballots with names of candidates who filed by or at the third Council meeting shall be preprinted with an appropriate heading.
   b. In caucuses where CTA Board and CTA/ABC Committee Members are being nominated for election by the Council, the CTA Board election shall be conducted first.
   c. In the event that only one nominee is presented for an office, the question of waiving the ballot shall be immediately placed before the caucus on a non-debatable basis. *[Revised 6/14]*
   d. The chairperson shall give ballots to only State Council members (or alternates) whose names are on the official list and any ex officio-voting members (Executive Officers, CTA Board of Directors and NEA Board of Directors) employed in the district.
   e. Voting members shall sign for a ballot.
   f. Caucus members shall vote in an area specified by the chairperson.
   g. Voted ballots shall be returned to the chairperson.
   h. The chairperson shall appoint at least two (2) members of the caucus to assist in the counting of the ballots and shall announce the results by reading the Teller's Report.
   i. A majority vote shall be required to win on the first ballot.
   j. Voted ballots shall be returned to the Elections and Credentials Committee Chairperson. *[Revised 7/02]*
   k. The Elections and Credentials Committee Chairperson will announce to State Council the name of the caucus nominee and the names of any additional nominees who have submitted a nomination in writing. *[Adopted 7/02, Revised 6/12]*
4. **Run-off Election.**

   If a candidate does not receive a majority vote, a run-off election shall be conducted between 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. *[Revised 7/03]*
   a. Ballots will be distributed by the chairperson, to caucus members eligible to vote. *[Revised 6/14]*
   b. Voted ballots shall be returned to the chairperson.

c. The chairperson and assistant(s) shall count the ballots and announce the results by reading the Teller's Report.
d. If the result is a tie vote, the caucus members shall vote, up to two more run-off votes, until one candidate receives a majority of the votes cast. *[Revised 7/96]*
e. If the result is still a tie vote, the names of candidates in the run-off election shall be presented to the Council. *[Revised 7/96, Renumbered 7/03]*

II-12. State Council Nominations for Geographical District Offices (Sunday – 3rd Meeting)

[Revised 6/11]

1. The Chairperson of the CTA Elections and Credentials Committee shall present the name of the directorial district caucus nominee to the Council.
2. In the event that only one nominee is presented for an office, the question of waiving the ballot shall be immediately placed before the Council on a non-debatable basis (3rd Meeting).
3. A two-thirds (2/3) vote shall be required to waive the ballot (3rd Meeting).
4. Any person wishing to nominate a qualified member (who may be himself/herself) shall do so by presenting in writing, prior to the Elections and Credentials Committee report, the name of the nominee to the Chairperson of the Elections and Credentials Committee who shall announce the nominee to the Council. *[Revised 6/10]*
5. The President or designee shall close nominations for the district before proceeding to another caucus nominee.

[Revised and Renumbered 6/12]

II-13. Speeches and Voting for Geographical District Offices (Saturday – 4th meeting)

1. The nominees presented at the third (3rd) State Council meeting from those directorial districts where a nomination was made from the floor shall be given an opportunity to speak to the Council on Saturday at the fourth (4th) State Council meeting following the guidelines set forth in Section II-10 herein above.
2. **Printing of Ballots.**
   a. The names of candidates on the ballot shall be listed according to the CTA alphabet for the year. *(See Appendix C)*
   b. CTA shall be responsible for the printing of all ballots on which State Council members shall vote.
   c. Ballots shall be printed for each election.
   d. Ballots and/or instruction sheets for officer and director elections shall be prepared with the names of candidates listed.
   e. A candidate shall have his/her name listed on the ballot and/or instruction sheet as indicated on the declaration of candidacy form.
   f. When a candidate's last name is hyphenated, the name before the hyphen shall be used for placement on the ballot and/or instruction sheet.
   g. Candidates' names on the ballot and/or instruction sheet shall be limited to twenty-six (26) characters, including spaces, hyphens, and other punctuation marks.
   h. Space shall be provided for write-ins. *[Revised 6/04]*
3. **Eligibility of Voters.** *(See Appendix F)*
   a. Members of the State Council who have been elected by a direct vote of the membership shall be eligible to vote in State Council elections. A list of duly certified voting State Council members and duly certified Alternates shall be prepared.
   b. Alternates must register with the CTA Registration desk no later than noon on the first day of each State Council meeting. The name(s) will then be given to the Chairperson of the Elections and Credentials Committee. *[Revised 6/13]*
4. **Observers.**
   a. Each candidate may designate one representative to observe the voting process.
   b. The name of the observer shall be submitted in writing to the Chairperson of the Elections and Credentials Committee prior to the opening of the polls.
   c. The observer shall not interfere with the work of the Elections and Credentials Committee and must remain in the Election room until the results are posted.
   d. Electronic devices of any kind (cell phone, computer, tablet, etc.) are not allowed in the counting area. *[Revised 6/13]*

5. **Voting.**
   a. Each voter must wear the State Council badge issued for the meeting at which the election is held.
   b. No campaign materials, clothing, or jewelry will be permitted in the polling place.
   c. No campaigning shall occur in or around the polling place, or with individuals in line to vote.
   d. No food or drink will be permitted in the polling place while voting is in progress.
   e. Each voter must sign the voter roster after his/her name before receiving a ballot from the Elections and Credentials Committee.
   f. Alternates must sign his/her name after the name of the person he/she is replacing.
   g. A ballot marked in error shall be returned to the Chairperson of the Elections and Credentials Committee who shall mark it "Void" and sign the ballot before issuing a replacement ballot.
   h. Every effort shall be made to ensure that the voter is able to mark his/her ballot in secrecy.
   i. The voter shall place his/her marked ballot into the voting machine. *[Revised 6/13]*

6. **Vote Requirements.**
   a. A majority vote of the ballots cast shall be required to win the election for CTA/ABC Committee Member or director. A majority vote shall be more than half of the votes cast by persons legally entitled to vote, excluding blank or illegal ballots, for each office.
   b. If a candidate does not receive a majority vote, a run-off election shall be conducted on Sunday between 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. *[Revised 6/13]*

7. **Counting of Ballots.**
   a. The Elections and Credentials Committee shall count the ballots in the designated Election room.
   b. The Chairperson of the Elections and Credentials Committee shall prepare the Official CTA State Council Teller's Report which shall be signed by the members of the Elections and Credentials Committee. *(See Appendix G)*
   c. Immediately following the completion of the Teller's Report, the results of the balloting shall be given to the President to announce.
   d. If the State Council is in recess, the results shall be posted.
   e. A copy of the signed voter roster shall be posted.
   f. The President or designee shall announce the results of the election to the State Council as soon as possible. *[Revised 6/13]*

[Revised and renumbered 6/11, 6/13]

II-14. Challenge of Elections for Geographical District Offices

1. **Caucus Voting Eligibility.**
   a. Challenges to the caucus nomination procedures must be made at or before the time of caucus voting and filed with the Elections and Credentials Committee within thirty (30) minutes after the close of the caucus.
   b. The Elections and Credentials Committee shall keep the ballot of any challenged voter(s) separate and sealed until a determination is made as to whether or not such ballot(s) could affect the outcome.
   c. If such ballot(s) could affect the outcome of the election, the Elections and Credentials Committee shall conduct such fact finding as is possible and report the circumstances to the State Council, whose decision as to acceptance of such ballot(s) shall be final.
   d. Challenges to caucus nominations are not in order after the State Council has voted to elect a Board of Director and/or CTA/ABC Committee Member.

2. **Caucus and State Council Election.**
   a. Any member observing an irregularity in voting procedure or in counting and tallying must file a challenge in writing to the Chairperson of the Elections and Credentials Committee within one (1) hour after the results are posted.
   b. The Chairperson of the Elections and Credentials Committee shall inform the CTA President of the challenge.
   c. The CTA President may request the Elections and Credentials Committee to conduct an investigation and to report to the President within one (1) hour.
   d. The President shall report to the State Council on the day of the election.

e. The State Council may either void the election and order another one, or may confirm the election.

II-15. Vacancies in Geographical District Offices Elected by State Council

1. In the event a vacancy should occur in a geographical district office elected by the State Council, the Chairperson of the Elections and Credentials Committee shall announce that a special election shall be held at the next regular State Council meeting to fill the vacancy.
2. If there are at least five (5) weeks before the next regular State Council meeting, the announcement may be made by mail.
3. Chapter presidents will be notified by mail of the opportunity to file declarations of candidacy for the vacant offices which will be voted on at the next State Council meeting.
4. The regular procedure shall be followed, except as follows:
   a. At the next State Council meeting, nominations and acceptance speeches shall be given.
   b. Nominations may be made from the floor, provided that prior written consent of the nominee has been obtained.
   c. The election shall be held at the same meeting.
   d. The run-off election, if necessary, shall be held at the same meeting.
5. The financial limitations will be the same as those listed for the position that has the vacancy.
6. The qualifications are the same as those listed for the position that has the vacancy.
7. The length of speeches are the same as that listed for the position which has the vacancy.
8. Since nominations and voting are completed at the same meeting, the Association shall not print or distribute campaign material

II-16. Campaign Violation Complaint

Upon receipt of a Campaign Violation Complaint Form, the Elections and Credentials Committee will initiate an investigation. If upon investigation the Committee determines that a violation has occurred, the Elections and Credentials Committee Chair will announce through the next General Session Elections Committee Report the nature of the violation committed by the specific campaign. *[Revised 6/12]*

III. CTA/ABC Committee Internal Elections

1. The election of CTA/ABC Committee Chairperson, Vice Chairperson, and Recording Secretary shall be held at the 4th State Council meeting.
2. The term of office for newly elected CTA/ABC Officers will commence on June 26. *[Revised 6/99]*
3. Only the current Members from each geographical district and At-Large Members shall be eligible to be candidates and to vote. *[Revised 7/97]*
4. A member of the CTA Elections and Credentials Committee shall chair the election portion of the meeting of the CTA/ABC Committee.
5. The Elections and Credentials Committee member shall appoint a timekeeper and two (2) members from among CTA/ABC Committee Members to assist in the counting of ballots.
6. The Elections and Credentials Committee member shall call for nominations for Chairperson of the CTA/ABC Committee.
7. Any CTA/ABC Committee member may nominate a CTA/ABC Committee member, including himself/herself. Advance declarations of candidacy are not necessary.
8. In the event that only one (1) nominee is presented for an office, the question of waiving the ballot shall be immediately placed before the Committee on a non-debatable basis. A two-thirds (2/3) vote shall be required to waive the ballot. *[Revised 6/99]*
9. Combined nomination (optional) and acceptance speeches shall be no more than five (5) minutes.
10. After all nomination and acceptance speeches have been made, the Elections and Credentials Committee member shall distribute ballots with a preprinted heading to each CTA/ABC Committee Member.
11. Voted ballots shall be returned to the Elections and Credentials Committee member.
12. The Elections and Credentials Committee member and assistants shall count the ballots.
13. A majority vote shall be required to win on the first ballot.
14. If no candidate receives a majority vote on the first ballot, a run-off election shall be held.
15. The candidates in the run-off election shall be those receiving the two highest numbers of votes on the first ballot.
16. The Elections and Credentials Committee member shall distribute run-off ballots with a preprinted heading to CTA/ABC Committee members.
17. Voted ballots shall be returned to the Elections and Credentials Committee member.
18. The Elections and Credentials Committee member and assistants shall count the ballots.
19. The Elections and Credentials Committee member shall announce the results.
20. If the result is a tie vote, the Members shall continue to vote until one candidate receives a majority of the votes cast.
21. The same procedure shall then be followed for the election of Vice Chairperson and Recording Secretary.

IV. General Election Procedures for State Council of Education Representatives and Alternates

IV-1. Electoral District Responsibilities

1. Chapter presidents must provide members an opportunity to vote in all elections for State Council Representatives.
2. Chapter presidents do not have the option of deciding that such election shall not be held.
3. When an electoral district is composed of one chapter, the chapter elections committee shall be responsible for conducting the election.
4. When an electoral district is composed of two or more chapters, the Service Center Council elections committee shall be responsible for conducting the election.
5. If a multiple chapter electoral district is the same as a UniServ unit, the UniServ unit may conduct the election by mutual consent.
6. Elections shall be conducted by a chapter or Service Center Council after receipt of an official notification from the CTA Elections and Credentials Committee.

[Revised 6/14]

IV-2. Terms of Office for State Council Representatives and Alternates

1. The term of the State Council Representative and/or Alternate is three (3) years.
2. No person may serve more than three (3) consecutive three-year terms.
3. No person may serve more than eleven (11) consecutive years, including completed and/or extended terms, without a break in service of at least one year as a State Council Representative or as an Alternate.
4. No person will be eligible for election for any term which would provide total service greater than eleven (11) consecutive years.
5. Service as an Alternate does not count towards the eleven (11) years allowed as a regular State Council Representative.

IV-3. Qualifications for State Council Representatives and Alternates

A candidate for State Council Representative and/or Alternate must be an Active member of CTA, NEA and a chapter, if available.

IV-4. Vote Requirements for State Council Representatives and Alternates

1. **State Council Representatives.**
   State Council Representatives shall be elected by a majority vote.
2. **State Council Alternates.**
   a. State Council Alternates must be elected.
   b. Prior to the election, the electoral district must decide on how the Alternate is to be elected. This decision must be published on nomination forms, ballot, and in the elections procedures for that election. The following are the methods by which Alternates can be elected, and the electoral district must select one:
      1. Runners-up become Alternate(s);
      2. Another election held after Representative is elected;
      3. Separate election.
   c. Elections shall be by plurality vote.
   d. An Alternate does not automatically become a Representative when a State Council position becomes vacant.
   e. An Alternate serves as Alternate for an electoral district, not for a State Council Representative.

IV-5. Numbered Seat System

[Revised 6/14]

Chapters or multiple chapters may choose to use the numbered seat system to conduct elections in accordance with the following procedures:

1. The numbered seat system requires each State Council seat to be numbered. *(See Appendix L)*
2. Before nominations are opened, single chapters and multiples whose electoral district is the same as a UniServ unit must decide and then announce whether or not the numbered seat system shall be used. Otherwise, the single list system will be used.

3. Once the election system has been determined, it cannot be changed until the election has been concluded, the results have been posted, and until any and all challenges have been resolved. *[Revised 6/04]*
4. A candidate must declare for which number seat s/he is running.
5. Voters can vote for one candidate in each numbered seat.
6. A majority will constitute more than half of the votes cast by persons legally entitled to vote, excluding blank or illegal ballots.
7. The candidate receiving the majority vote is elected. Otherwise, the two candidates receiving the highest number of votes shall participate in a run-off. **There shall be no provisions for write-in candidates in run-off elections.**
8. An alternate serves as an alternate for an electoral district, not for a specific numbered seat. *[Adopted 6/00]*

IV-6. Filing a Declaration of Candidacy for State Council Representatives and Alternates

1. **Open Nominations.**
   a. Nominations for State Council Representative and Alternates shall be conducted according to the Open Nomination procedure. This procedure holds that every eligible CTA member shall have the opportunity to nominate any CTA member who meets the qualifications for office.
   b. In the event that there are no declaration of candidacy forms received for a position, the election shall be held with a write-in provision on the ballot for that position. *[Revised 6/14]*
2. **Filing Procedure.**
   a. A member must file using an official CTA Declaration of Candidacy for State Council Representative and/or Alternate form. The candidate statement included on the declaration of candidacy form must be limited to thirty (30) words. Reference to ethnic minority identification will not be counted in the limitation of words. *(See Appendix H(a) and H(b))* *[Revised 6/11, 6/14]*
   b. Declarations of candidacy must be received in the office stated on the form by the date and time stated on the form. **IT IS THE RESPONSIBILITY OF THE CANDIDATE TO ENSURE THAT THIS DOCUMENT IS RECEIVED BY THE DUE DATE AND TIME.** *[Revised 6/14]*
   c. If an electoral district unit so declares, declarations of candidacy forms may be faxed to the office stated on the form. Each faxed declaration will have the date and time received noted by the elections committee chair or designee. *[Revised 7/96, 7/97, 5/99, 7/03]*
3. **Withdrawal of Candidacy.**
   In order for his/her name not to appear on the ballot, any person withdrawing from candidacy may do so only by written request to the appropriate chapter, UniServ unit, or Service Center Council.

IV-7. Campaigning for State Council Representatives and Alternates

1. **Site List.**
   Each candidate shall have the right to a list of the names and addresses of work sites and the number of Active members at each site for the purposes of campaigning. *[Revised 6/14]*
2. **Chapter Publications.**
   A chapter may not endorse a candidate for State Council Representative or Alternate. *[Revised 6/12]*
3. **Campaign Contribution.**
   a. Monies received by a chapter by ways of dues, assessment or similar levy must not be applied to promote a candidate.
   b. Candidates 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.
4. **Logo.**
   The use of all Association logos shall not be allowed on campaign materials.
5. **Campaign flyers/materials.**
   All campaign flyers/materials must include the following disclaimer, which must be stated verbatim: "The views and opinions expressed are those of the candidate and not necessarily those of CTA and NEA." *[Revised 6/04, 6/14]*
6. District email addresses and/or electronic systems shall not be used for campaigning. Use of district school mailboxes for campaigning must follow district policy. *[Revised 6/12, 6/14]*
   [Renumbered 6/12]

IV-8. Campaign Materials for State Council Representatives and Alternates

1. A chapter or Service Center Council will honor all reasonable requests to distribute campaign literature to all members whether the distribution is by mail or other means, at the expense of the candidate.
2. All privileges, including distribution of campaign material without charge, extended to one candidate must be extended to all. Refusing to honor any and all reasonable requests for distribution of campaign material at the candidate's expense is not permitted. *[Revised 6/14]*
3. The chapter or service center shall inform all candidates of rules in this regard.

IV-9. Election Procedures and Timelines for State Council Representatives and Alternates *[Revised 6/14]*

1. **Single Chapter Electoral Districts.**
   a. **Step 1.** CTA Elections and Credentials Committee sends notification to Chapter Presidents for "single chapter electoral districts" to hold an election.
   b. **Step 2.** The Chapter Elections Committee (Chapter EC), appointed in accordance with the *Requirements for Chapter Election Procedures*, shall meet to discuss the following procedures:
      1. Decide on a single list or numbered seat system.
      2. Decide on uniform method of distribution of ballots and voter roster/sign-in sheets, e.g. by mail, pick up at a meeting, or other.
      3. Decide the process for candidates to request the list of the names and addresses of work sites and the number of Active members at each site for the purposes of campaigning.
      4. Decide on the method by which Alternates are to be elected in accordance with Section IV-4.2(b) and determine which Declaration of Candidacy form (Appendix H(a) or H(b)) will be used accordingly.
      5. Decide on number of Alternates to be elected, which must be included on the ballot.
   c. **Step 3.** The Chapter EC will determine and publish the following timeline, which shall be long enough to allow for voting by mail where there are year-round schools, and shall include dates for run-offs and possible challenges:
      1. Dates to announce vacancy(ies);
         a) Inform members that names on ballot must be listed in order of the current CTA alphabet;
         b) Allow at least fifteen (15) calendar days between the announcement of the vacancy(ies) and the date voting begins;
      2. Deadline date for return of declaration of candidacy forms;
      3. Deadline date for submission of biographical material;
      4. Date that each candidate shall receive an acknowledgement of the filing (inform the candidates that each candidate may designate one observer, who may be the candidate);
      5. Deadline for candidates to request the list of the names and addresses of work sites and the number of Active members at each site for the purposes of campaigning;
      6. Dates for preparation of candidate statements/biographical material, ballots, voter roster/sign-in sheets;
         a) Candidate statements/biographical materials shall not be printed on the ballot;
      7. Dates that ballots will be distributed;
      8. Dates that voting will take place (no less than five (5) and no more than fifteen (15) calendar days for voting);
      9. Deadline date for return of ballots and voter roster/sign-in sheet from schools to unit elections committee;
      10. Date, time and place where ballots will be counted. Counting shall be immediately after the deadline for return of ballots;
      11. Date that announcement of results will be sent to candidates and CTA;
      12. Dates and timelines for run-off election, if necessary; and
      13. Deadline date for filing of challenges to initial election and run-off, if necessary (date received, not date postmarked). Challenge timeline must follow the procedures outlined in Section IV-17.

d. **Step 4.** Chapter EC convenes a meeting with Association Representatives (AR's) to review election requirements, timelines, guidelines and voting procedures.
e. **Step 5.** The Chapter EC consisting of at least three (3) persons who are not candidates will verify that ballots and voter roster/sign-in sheets have been returned. The Chapter EC shall count the ballots and report to the chapter president.
f. **Step 6.** The chapter president announces results to chapter members and makes appropriate arrangements for posting of results not later than five (5) calendar days at each school/work site.
g. **Step 7.** Chapter EC prepares the official CTA Teller's Report and official Report of Results of Election forms and sends them to CTA with a copy of the ballot and timeline. A minimum of two (2) signatures are required on both forms. (See Appendix J, J(a), K, K(a))

[Revised 7/03, 6/11, 6/13, 6/14]

2. **Multiple Chapter Electoral Districts.**
a. **Step 1.** CTA Elections and Credentials Committee sends notification to Service Center Council Chairpersons for "multiple chapter electoral districts" to hold an election. A copy shall be sent to the chapter presidents.
b. **Step 2.** Service Center Council Chairperson shall contact chapter presidents in their multiple by phone, in person, by letter or by e-mail, requesting the contact information for the Chapter Elections Chairperson.
c. **Step 3.** The Service Center Council Elections Committee (SCC EC), appointed in accordance with the *Requirements for Chapter Election Procedures*, shall meet to determine the following procedures:
    1. Decide on a single list or numbered seat system.
    2. Decide on uniform method of distribution of ballots, voter roster/sign-in sheets, and signature and ballot verification sheets, e.g. by mail, pick up at a meeting, other.
    3. Decide the process for candidates to request the list of the names and addresses of work sites and the number of Active members at each site for the purposes of campaigning.
    4. Decide on the method by which Alternates are to be elected in accordance with Section IV-4.2(b) and determine which Declaration of Candidacy form (Appendix H(a) or H(b)) will be used accordingly.
    5. Decide on number of Alternates to be elected and include the information on the ballot.
d. **Step 4.** The Service Center Council Elections Committee (SCC EC) shall coordinate with the Chapter Elections Committee (Chapter EC) to determine and publish the following timeline, which shall be long enough to allow for voting by mail where there are year-round schools, and shall include dates for run-offs and possible challenges:
    1. Dates to announce vacancy(ies);
        a) Inform members that names on the ballot must be listed in order of the current CTA alphabet;
        b) Allow at least fifteen (15) calendar days between the announcement of the vacancy(ies) and the date voting begins;
    2. Deadline date for return of declaration of candidacy forms;
    3. Deadline date for submission of biographical material;
    4. Date that each candidate shall receive an acknowledgement of the filing (inform the candidates that each candidate may designate one observer, who may be the candidate);
    5. Deadline for candidates to request the list of names and addresses of work sites and the number of Active members at each site for the purposes of campaigning;
    6. Dates for preparation of ballots, candidate statements/biographical material, voter roster/sign-in sheets, and signature and ballot verification sheet (see Appendix I);
        a) Candidate statements/biographical materials shall not be printed on the ballot;
    7. Dates that ballots will be distributed;
    8. Dates that voting will take place (no less than five (5) and no more than fifteen (15) calendar days for voting);
    9. Deadline date for return of ballots and voter roster/sign-in sheet from schools to unit elections committee;
    10. Deadline date for return of unit ballots, voter roster/sign-in sheets, and signature and ballot verification sheet (see Appendix I) from chapter to SCC EC;

11. Date, time and place where ballots will be counted. Counting shall be immediately after the deadline for return of ballot(s);
12. Date that announcement of results will be sent to unit presidents, candidates, and CTA (no later than five (5) calendar days from the date ballots are counted);
13. Dates and timelines for run-off election, if necessary.
14. Deadline date for filing of challenges to initial election and run-off, if necessary (date received, not date postmarked). Challenge timeline must follow the procedures outlined in Section IV-17.

e. **Step 5.** The SCC EC sends each chapter a written summary of requirements, timelines, procedures, and guidelines (even if presidents attended planning meeting). The mailing should include a request for nominations and also the number of ballots needed.

f. **Step 6.**
1. On behalf of the SCC EC, the Chapter EC announces to CTA members that nominations are open and provide a Declaration of Candidacy form to any member who makes the request.
2. Declarations of Candidacy and nominations are returned to the SCC EC.
3. SCC EC sends an acknowledgement letter and the written summary of election rules to each candidate.

g. **Step 7.**
1. SCC EC prepares and distributes the ballots, voter roster/sign-in sheets, and signature and ballot verification sheets (see Appendix I) to the chapter elections chairs.
2. Chapter EC takes responsibility for allocating the ballots to the voting site so that the election can be conducted according to the established election procedures.
3. The Chapter EC verifies the voter roster/sign-in sheets, counts the number of ballots cast, and completes the signature and ballot verification sheet (see Appendix I), returning the completed ballots, voter roster/sign-in sheets and the signature and ballot verification sheet to the SCC EC by the deadline date.

h. **Step 8.** SCC EC checks to see if ballots, voter roster/sign-in sheets and signature and ballot verification sheets have been returned from the chapters.
1. SCC EC verifies that the information on the signature and ballot verification sheet is correct (i.e., number of ballots and number of signatures match) and determines the number of legal ballots cast.
2. SCC EC separates the voter roster/sign-in sheets from the ballots, puts all ballots together and tallies all the ballots.
   a) The ballots shall not be tallied by site/chapter.
   b) When the votes in a Service Center Council are set aside for various reasons, such as more ballots than signatures and those that, if included, would change the results, the question of whether to count the ballots should be sent to the CTA Elections and Credentials Committee.
3. SCC EC prepares a Teller's Report with the results of the election and prepares and mails the announcement of the results to the chapter president and candidates, not later than five (5) calendar days from the date ballots are counted.
4. SCC EC prepares the official CTA Teller's Report and official Report of Results of the Election forms and sends them to CTA with a copy of the ballot and timeline. A minimum of two (2) signatures are required on both forms. (See Appendix J, J(a), K, K(a))
5. SCC EC shall retain the ballots, Teller's Reports, and other materials related to the election for one (1) year.
6. Chapter presidents shall announce the results to the chapter members.
7. SCC EC implements timeline for run-off election if necessary.

[Revised 6/11, 6/12, 6/13, 6/14]

IV-10. Voting Methods

Elections for State Council Representatives and Alternates conducted by single chapter electoral districts and/or multiple chapter electoral districts shall be conducted using methods outlined in Section VII, Voting Methods found in the *Requirements for Chapter Election Procedures.* *[Revised 6/13, 6/14]*

IV-11. Run-off Elections for State Council Representatives and Alternates

1. **State Council Representatives.**
   If a candidate does not receive a majority vote, a run-off election shall be conducted between 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.**
2. **State Council Alternates.**
   When there is a tie in a plurality election, the following procedure shall be followed:
   [Revised 6/11, 6/14]
   a. When there is a tie, the ballots shall be recounted.
   b. If the result is still a tie, the elections committee chairperson shall:
      1. Call the candidates (according to the CTA alphabet) and inform them of the tie and that a coin toss shall be used to determine the winner.
      2. If the first candidate called wishes to remain in the race, the chairperson shall ask that candidate to choose "heads" or "tails" in the coin toss.
      3. The elections committee chairperson shall designate the time and place for the coin toss and inform the candidates, who may have an observer present. The observer may be the candidate.
      4. The elections committee shall note the coin toss on the CTA State Council Official Teller's Report. *[Revised 6/12]*
      5. The elections committee shall follow the established procedure in notifying the candidates of the results.
3. The Official State Council Teller's Report from the election that caused the run-off must be submitted with the run-off election documents. *[Revised 6/13]*

IV-12. Certification, Designation, and Registration of State Council Representatives and Alternates.

1. **Certification of Election.**
   a. The current Official State Council Teller's Report– Representative Election, CTA Report of Results of Elections – State Council Representative(s), Official State Council Teller's Report– Alternate Election (if alternates were elected) and Report of Results of Elections – State Council Alternate(s) (if alternates were elected) must be completed and returned to the CTA Governance Support Department in order for the election to be certified by the Chairperson of the CTA Elections and Credentials Committee. A minimum of two (2) signatures shall be required to validate the Teller's Report and Report of Results of Elections forms. *(See Appendix J, J(a), K, K(a))* *[Revised 6/11, 6/13]*
   b. The results, on a CTA Official State Council Representative/Alternate Election Teller's Report shall be accepted from: *[Revised 6/13]*
      1. A chapter president or designee of a single chapter electoral district.
      2. Service Center Council Chairperson or designee of a multiple chapter electoral district.
      3. UniServ Chairperson or designee when a multiple chapter electoral district is the same as the UniServ unit.
2. **Designation of Alternates.**
   In the event an elected representative is unable to attend a meeting of the State Council of Education, an elected alternate shall be designated using the following process:
   [Revised 10/78, 10/95]
   a. **Single Chapter.** In an electoral district comprised of a single chapter, an elected representative who is unable to attend such a meeting shall notify the president of the chapter, who shall designate an alternate on the basis of seniority as an alternate and using a rotation method for each meeting that an alternate is needed. If seniority is equal among alternates, then the CTA alphabet will be used to determine which senior alternate will be contacted and notified to attend. The rotation will become effective with the first State Council meeting. If an alternate is unable to attend a meeting, the alternate shall retain his/her place in the rotation order. *[Revised 6/14]*
   b. **Multiple Chapters.** In an electoral district comprised of two (2) or more chapters, an elected representative who is unable to attend such a meeting shall immediately notify the CTA President through the Governance Support Department. In an electoral district comprised of

two or more chapters, alternates in multiple electoral districts shall be selected on the basis of seniority and using a rotation method for each meeting that an alternate is needed. If seniority is equal among alternates, then the CTA alphabet will be used to determine which senior alternate will be contacted and notified to attend. The rotation would become effective with the first State Council meeting. If an alternate is unable to attend a meeting, the alternate shall retain his/her place in the rotation order. *[Revised 3/91, 6/92, 10/95]*

c. In the event a representative in a multiple electoral district is absent from State Council for more than one meeting, due to a leave of absence approved by the CTA Board, the same alternate who has been selected on the basis of seniority shall attend for the representative in his/her absence. If seniority is equal among alternates, then the CTA alphabet will be used to determine which senior alternate will be contacted and notified to attend. Once the representative returns to State Council, the alternate who attended for the absent representative shall move back into the rotation process. *[Revised 10/95]*

d. Only those alternates who have been officially certified by the CTA Elections and Credentials Committee prior to the opening of the first session of State Council shall be seated and permitted to vote. *[Adopted 3/72, Revised 10/95]*

3. **Registration at State Council Meetings.**

a. Representatives certified as prescribed above shall be permitted to register at State Council meetings not later than noon on the first State Council day.

b. Such registration shall include issuance of a State Council badge and materials at the CTA registration desk.

c. Whenever possible, the Chairperson of the Elections and Credentials Committee shall be available to assist the CTA registration desk staff with certification of Representatives and Alternates whose names have not been previously submitted.

d. When this is not possible, an Alternate, or Representative with a special problem, shall be directed to the Elections and Credentials Committee for assistance.

e. An Alternate certified under the above provisions must register by noon on the first State Council day and sign a statement that he/she is serving for a designated Representative. *[Revised 7/03]*

f. Once the Alternate has registered, that seat is filled for the duration of that State Council meeting.

g. An Alternate badge shall be issued which will include the name of the Alternate and the absent Representative.

h. The practice of seating unelected alternates is not allowed. *[Revised 6/13]*

IV-13. Over-Represented Single and Multiple Chapters

Whenever an electoral district loses membership and is otherwise thereafter over-represented by one or more excess representatives, the following shall apply within the year following the decrease in membership:

1. If there are sufficient terms expiring that an open election can be held for the newly established decreased allocation, an election shall be held for the appropriate number of open seats.
2. If sufficient terms expire which would eliminate the excess representation and no incumbent otherwise eligible to seek reelection is thereby deprived of doing so, no further action shall be required, and all elections to fill expiring terms thereafter shall be held as regularly scheduled.
3. If sufficient terms do not expire; which would eliminate the excess representation, all terms shall expire and an open election shall be held to fill the allocated seats.
4. Those incumbents who are reelected shall be assigned to the same term previously held.

IV-14. Election of At-Large Representatives and At-Large Alternates to State Council

1. The Board of Directors, upon recommendation of the Representation Committee, shall recommend the allocation of At-Large State Council members to Service Center Councils.
2. The Board of Directors, through the Elections and Credentials Committee, shall notify each Service Center Council Chairperson if an election is necessary.
3. The election for At-Large State Council Representatives may be conducted at the same time as the other elections.
4. The Service Center Council shall follow procedures for an all-member vote, including ESP members.

5. The Service Center Council shall follow procedures set forth in Section IV-9.3 for Multiple Chapter Electoral Districts. *[Revised 6/13]*
6. Candidates must be an ethnic minority (African American, American Indian/Alaska Native, Asian/Pacific Islander, or Hispanic).
7. The winner(s) shall be determined by plurality vote.
8. If there is a tie, the procedures set forth in Section IV-11.2 shall be followed.
9. The term shall be for three (3) years.
10. Alternates shall be ranked in the order of votes received.
11. If the seat is vacated, the Alternate shall fill the vacant seat until the CTA Board of Directors determines the status of the vacancy.
12. In the event a special election is necessary to fill a vacancy, as determined by the CTA Board of Directors, the same procedure shall be followed.
13. ESP members are eligible to run for State Council Members At-Large positions provided they meet the requirements set forth in Section IV-14.6 of this *CTA Elections Manual*.

[Revised 6/11]

IV-15. Election of State Council Retired Representatives

1. CTA/NEA–Retired shall elect one (1) State Council Representative from each of the four (4) CTA Geographical regions.
2. CTA/NEA-Retired shall have open nominations and a secret ballot for all State Council representatives.
3. A candidate must be a member of CTA-Retired and of NEA-Retired, and must reside in the retired electoral district s/he is elected to represent.
4. Voting timelines and procedures for the election of Retired Representatives shall be published by the CTA Board of Directors to correspond with official CTA publication dates.
5. A nomination/self-nomination form for Retired Representatives shall be published in an issue of the official CTA publication in the year in which the election is to be held.
6. The ballot shall be mailed to members of CTA-Retired.
7. The ballot will indicate the electoral district that each candidate aspires to and is eligible to represent.
8. Each CTA-Retired member shall be eligible to cast a vote for one Retired Representative candidate in each Retired electoral district on the ballot.
9. The winner(s) shall be determined by plurality vote.
10. The term of Retired Representative shall be three (3) years.
11. A Retired Representative shall be eligible for reelection but no person may serve more than three (3) consecutive three-year terms or serve more than eleven (11) consecutive years, including completed and/or extended terms, without a break of service of at least one (1) year.
12. Service as a Retired Representative and service as a Representative elected from an electoral district shall be calculated separately for the purposes of the eleven-year limitation.
13. Alternates shall be ranked in the order of votes received in the Representative election.
14. If the position of a Retired Representative becomes vacant before the end of that Retired Representative's elected term, the first Alternate shall serve as Retired Representative through June 25 of the year in which the position becomes vacant.
15. If one (1) or more years of the vacated term will then remain, an election will be held for Retired Representative to serve for a new three (3) year term.
16. The Board of Directors shall have the authority to call special elections for Retired Representative(s) whenever conditions warrant.

[Revised 6/04]

IV-16. Election of State Council Student CTA Representatives

1. CTA rules governing election of CTA State Council Representatives shall prevail.
2. The CTA Board of Directors, upon recommendation of the Representation Committee, shall recommend the allocation of Student CTA (SCTA) State Council Representatives determined by SCTA membership totals.
3. The CTA Board of Directors, through the CTA Elections and Credentials Committee, shall notify the Student CTA President when an election is necessary.
4. The SCTA Elections Committee shall be responsible for ensuring that all timelines, rules and regulations of CTA are followed.

5. An all-member vote shall be conducted by mail to determine SCTA State Council Representatives and Alternates.
6. A candidate must be a member of Student CTA and Student NEA and must be an active student at the time elected.
7. The winner(s) shall be determined by plurality vote.
8. The term of SCTA Representatives and Alternates shall be one (1) year.
9. Alternates shall be ranked in order of votes received.
10. The results of the election shall be published in the last issue of "I Choose to Teach" and, if available, announced at the SCTA Representative Assembly.
11. If a seat of a SCTA Representative becomes vacant before the end of that Representative's elected term, the first Alternate shall serve as SCTA Representative through June 25 of the year in which the position becomes vacant.
12. Candidates' biographies shall not exceed thirty-five (35) words in length. *[Adopted 7/02]*

IV-17. Challenge Procedures for State Council Representative Elections

A challenge may be made regarding eligibility requirements or election requirements.

1. **Eligibility Requirements.**
   Representatives shall not be seated in the following circumstances:
   a. If an individual is not an active member of CTA/NEA and a chapter (if such membership is available).
   b. If the election results have not been submitted to and certified by the Chairperson of the CTA Elections and Credentials Committee c/o the Governance Support Department. *[Revised 6/14]*
2. **Election Requirements.**
   a. All elections shall be conducted using open nomination, (eligibility of any member to run) and secret ballot.
   b. All members in an electoral district shall be given an opportunity to vote.
   c. Elections shall be determined by majority vote or plurality vote where permitted.
   d. Voted ballots and voter roster/sign-in sheets must be returned to the election committee who shall retain them for one year.
   e. Preparation and distribution of campaign material must comply with Section I-7 of this *CTA Elections Manual.* *[Revised 7/97]*
3. **Challenge Procedure.**
   a. The announcement of election results shall be made the next day after the votes are counted.
   b. A challenging party(ies) must notify the chapter president and chapter elections committee chairperson (single chapter electoral district) or Service Center Council Chairperson and Service Center Council elections chairperson (multiple chapter electoral district) of a challenge in writing using the official Original Election Challenge Form *(See Appendix R)* within ten (10) calendar days after the announcement of the results, including any run-offs if necessary, of the election. *[Revised 6/04, 6/13]*
   c. The chapter elections committee/Service Center Council elections committee shall have ten (10) calendar days, commencing on the day the challenge was received and in accordance with chapter bylaws and standing rules or Service Center Council election procedures, to conduct an investigation of the challenged election for the purpose of determining the facts; to attempt to reach local resolution; and to issue a written report to the chapter executive board/Service Center Council steering committee regarding the validity of the challenge based on whether the alleged violation may have affected the outcome of the election.
   d. The chapter executive board/Service Center Council steering committee must render a decision on the challenge and send a copy of that decision to the challenging party, all candidates on the ballot, and the elections committee chair within ten (10) calendar days following receipt of the report. *[Revised 6/13]*
   e. Any member of the chapter executive board/Service Center Council steering committee who was a candidate in the race that has been challenged, was named in the challenge, signed an individual witness documentation form, or whose immediate family member was a candidate in the race that has been challenged, shall recuse themselves from discussion of and voting on the challenge. *[Revised 6/14]*

f. If in the case where the majority of the chapter executive board is unable to act on the challenge, the decision shall move to the Representative Council. In the absence of a Representative Council, the chapter shall contact the CTA Elections and Credentials Chairperson through the Governance Support Department to determine the next step. In the case where the majority of the Service Center Council steering committee is unable to act on the challenge, the Service Center Council shall contact the CTA Elections and Credentials Chairperson through the Governance Support Department to determine the next step. *[Revised 6/11]*

g. The challenging party or any candidate affected by the decision of the chapter executive board/Service Center Council steering committee may file an appeal on the official CTA Appeal Form to the CTA President within ten (10) calendar days from the date of the decision. The appeal shall include the information requested on the official CTA Appeal Form located in Appendix S of this manual. The appeal and all required documentation shall be received by the CTA President no later than 5:00 p.m. on or before the tenth (10th) day. *[Revised 6/04, 6/11, 7/12, 6/13]*

h. If the chapter executive board/Service Center Council steering committee fails to act within twenty (20) calendar days of the original challenge, the challenging party(ies) may file an appeal on the official CTA Appeal Form to the CTA President. The appeal and all required documentation, as requested on the official CTA Appeal Form located in Appendix S of this manual, shall be received by the CTA President no later than 5:00 p.m. on or before the tenth (10th) day. *[Revised 6/11, 6/13]*

i. The CTA President shall refer the matter to the Chairperson of the CTA Elections and Credentials Committee.

j. Upon receipt of the appeal, the CTA Elections and Credentials committee shall take jurisdiction of the challenge. The Elections and Credentials Committee Challenge Subcommittee consisting of the Chairperson of Elections and Credentials Committee, the Board Liaison to the Elections and Credentials Committee and two (2) Elections and Credentials Committee members shall conduct an investigation and determine whether:
   1. The challenge alleges a violation of a CTA election requirement.
   2. The challenge is supported by appropriate documentation.
   3. More information is needed, in which case, the information will be obtained via the most feasible method.
   4. The alleged violation may have affected the outcome of the election.
   5. A hearing should be conducted.

k. If it is determined that no basis for challenge exists:
   1. The Chairperson of the Elections and Credentials Committee shall submit a report including issues and recommendations to the CTA President and CTA Board of Directors.
   2. The CTA Board of Directors shall act on the report at its first opportunity, and the actions shall be mailed to the person(s) filing the challenge and to the chapter president/Service Center Council Chairperson.
   3. When an election is overturned, the seat is vacant until the new election is completed.

l. If it is determined that a hearing should be conducted:
   1. The Chairperson of the Elections and Credentials Committee shall appoint a panel of members from the Committee within seven (7) calendar days of the determination.
   2. The hearing will be held at a CTA office in the area of the electoral district, if at all feasible.
   3. The hearing will be held on a date that gives members sufficient notice and at a time that would allow maximum attendance.
   4. The notification will give the date, time and place of the hearing and the nature of the challenge.
   5. The notification will be sent to the Service Center Council Chairperson, the person(s) filing the challenge, the other candidates and others designated by the Chairperson of the CTA Elections and Credentials Committee.
   6. The notification shall indicate that other members may attend.
   7. Each person will be encouraged to present, prior to the hearing, a statement and evidence in writing to the Chairperson of the Elections and Credentials Committee c/o the Governance Support Department. *[Revised 7/97, 6/14]*
   8. At the conclusion of the hearing, the panel will prepare a written report to be sent to the CTA Board of Directors.

9. The CTA Board of Directors, at its earliest opportunity, shall act on the recommendations.
10. The CTA Board approved recommendations of the CTA Elections and Credentials Committee shall be sent to the Service Center Council Chairperson, the members who provided information and the challenging party(ies).

[Revised 6/10, 6/12]

IV-18. Vacancies in State Council Representative and Alternate Positions.

1. When a State Council Representative resigns a new election must be held. If there are no more than two (2) State Council meetings remaining in the term, the Alternate shall be allowed to complete the unexpired term. *[Revised 7/94]*
2. If an Alternate resigns in the middle of a term, the new Alternate shall complete the term of the resigned Alternate.
3. When an electoral district does not have a regularly elected Alternate, the Chairperson of the Elections and Credentials Committee shall send a notification to hold an election for an Alternate. *[Revised and renumbered 6/00]*
4. A vacancy shall not be declared if a representative/alternate receiving a lay-off notice is rehired by the district prior to the start of the following school year. *[Revised 11/08]*
5. The steps by which a State Council seat is declared vacant following the resignation of a State Council Representative are described in Appendix M. *[Revised 6/12]*

V. Educational Support Professionals

V-1. ESP Representation at State Council Meetings

1. Educational Support Professionals (ESP) members shall be allocated representation through single unit electoral districts or multiple unit electoral districts on the State Council of Education on the same ratio as that of CTA local chapters.
2. The electoral districts will be in a separate section of the Representation Book.
3. State Council Representatives from ESP electoral districts shall have all of the voting privileges other State Council Representatives have.
4. State Council Representatives from ESP electoral districts will be paid expenses on the same basis as Representatives from CTA local chapter electoral districts.

V-2. Election Responsibility for ESP

1. When an ESP electoral district is composed of one unit, that ESP unit shall be responsible for conducting the election.
2. When an ESP electoral district is composed of more than one unit, the CTA Service Center Council which has the most ESP members shall be responsible for conducting the election.

V-3. Election Procedures for ESP

The election procedures for ESP Representatives to State Council shall be the same as that of Representatives from CTA local chapters. *(See Section IV "General Election Procedures for State Council of Education Representatives and Alternates")*

V-4. At-Large Representative and At-Large Alternate State Council Elections

ESP members are eligible to run for State Council Members At-Large positions provided they meet the requirements set forth in Section IV-14 of this *CTA Elections Manual*. *[Revised 6/11]*

VI. Recommendation/Endorsement Procedures for Candidates for NEA Office

VI-1. CTA/NEA Interview Team

1. A CTA/NEA Interview Team shall be appointed annually by the CTA Board of Directors upon recommendation by the CTA President.
2. The Interview Team's charge will be to formulate questions to determine candidate views and the impact of such views on CTA and to interview the both in-state and out-of-state candidates for NEA office.
3. The CTA/NEA Interview Committee Team shall interview candidates at a generally convenient time and location, which may be at a regular meeting of the NEA Board of Directors.
4. All candidates shall be informed by the CTA/NEA Interview Committee of the time and place for interviewing.
5. Recommendations of the Interview Team shall be presented to the CTA Board of Directors in a timely manner to permit the Board of Directors to make its recommendation to the State Council for consideration of endorsement.

VI-2. Recommendation of In-State Candidates

1. Each candidate seeking consideration for CTA endorsement shall notify the CTA President by the last State Council meeting two (2) years prior to the year the candidate runs for office.
2. Where a previously endorsed candidate is standing for reelection to the same office and is deemed to be a friendly incumbent, the Interview Team may waive the requirement for another interview.
3. The candidate must show evidence of endorsement from at least three locals.
4. The President shall notify the chairperson of the CTA/NEA Interview Team of such announcements.
5. The chairperson of the CTA/NEA Interview Team shall notify each in-state candidate and give him/her the opportunity to be interviewed no later than the third State Council meeting following the notification.
6. Each in-state candidate will be allowed up to fifteen (15) minutes for a presentation to the CTA/NEA Interview Team, after which the Interview Team may ask questions to determine the candidate's views on NEA issues and advocacy of California positions.
7. The CTA/NEA Interview Team will report to the CTA Board of Directors.
8. The CTA Board of Directors shall vote on a recommendation to present to the State Council.
9. Each recommended candidate will be given an opportunity to address the State Council.
10. Other candidates may also address the State Council.
11. The State Council will vote by secret ballot on the CTA Board of Director's recommendation at the same meeting at which the recommendation is made.
12. Candidates receiving a sixty percent (60%) vote of the State Council shall be recommended for endorsement to the California Caucus at the NEA Representative Assembly.
13. As a courtesy, once an in-state candidate has been recommended for endorsement by the State Council for an NEA office, out-of-state candidates for the same office shall be notified of the recommendation by the CTA President.
14. CTA shall provide opportunities to each recommended in-state candidate for promotion of his/her candidacy and for fund-raising events.

    Should a candidate wish to request the use of a table for campaigning at a CTA-sponsored event, s/he may do so no sooner than the close of the last California Caucus meeting of the NEA Representative Assembly preceding the election. *[Revised 6/99]*

VI-3. Recommendation of Out-of-State Candidates

The responsibilities for the endorsement procedure shall be as follows:

1. **Candidate.**
   a. Each out-of-state candidate for NEA office seeking consideration for California endorsement shall contact the CTA President.
   b. Any candidate who cannot attend the interview meeting may provide the CTA/NEA Interview Team with a five (5) to ten- (10) minute tape detailing his/her views on NEA issues.
   c. The candidate shall also have an opportunity to have a spokesperson represent him/her.

d. Any NEA candidate in attendance at a State Council meeting shall be allowed up to three (3) minutes for a presentation at a general session and shall also have the opportunity to speak up to one (1) minute at each directorial district caucus.
e. Should a candidate wish to request the use of a table for campaigning at a CTA-sponsored event, s/he may do so no sooner than the close of the last California Caucus meeting at the NEA Representative Assembly preceding the election. *[Revised 6/99]*

2. **CTA President.**
   a. The CTA President shall notify the chairperson of the CTA/NEA Interview Team of request(s) for endorsement.
   b. The CTA President shall assign each out-of-state candidate to a California NEA Director who shall serve as that candidate's official contact until CTA endorses a candidate for office.
   c. The CTA President will inform the candidate(s) of the CTA Board of Directors' recommendation and will also inform the California members on the NEA Board of Directors.
3. **California NEA Directors.**
   a. The CTA contact shall inform the candidate of the state's endorsement process, including the date of the State Council meeting when the recommendation is to take place and shall provide information about California's concerns and problems as they affect the office being sought.
   b. The CTA contact shall receive any free material provided by the candidate to be made available to State Council meetings and/or the California Caucus at the convention site.
4. **CTA/NEA Interview Team.**
   a. Where a previously endorsed candidate is standing for reelection to the same office and is deemed to be a friendly incumbent, the Interview Team may waive the requirement for another interview.
   b. The chairperson of the CTA/NEA Interview Team shall notify each out-of-state candidate and inform them of the opportunity to be interviewed.
   c. Each candidate will be allowed up to fifteen (15) minutes for a presentation to the CTA/NEA Interview Team, after which the Interview Team may ask questions to determine the candidate's views on NEA issues and advocacy of California positions.
   d. The CTA/NEA Interview Team will vote on recommendations for endorsement and may recommend as many candidates as there are openings.
5. **CTA Board of Directors.**
   The CTA Board of Directors will vote on the recommendation(s) of the CTA/NEA Interview Committee for endorsement of candidates for recommendation to the State Council.
6. **Voting Procedure.**
   a. The State Council will vote by secret ballot on the CTA Board of Director's recommendation at the same meeting at which the recommendation is made.
   b. Only the name(s) of the CTA Board of Director's recommended candidate(s) shall be listed on the ballot. *[Revised 6/14]*
   c. Should the Board choose not to make a recommendation, all candidates will be listed on the ballot.
   d. Candidates receiving a sixty percent (60%) vote of the votes cast shall be recommended to the California delegation at the NEA Representative Assembly for final endorsement.

VI-4. Recommendation of NEA Board At-Large Candidates at the NEA Representative Assembly

1. Notify the CTA President by the close of the first California Caucus.
2. Interviews will occur in the morning and on the day following the first and second California Caucus meetings.
3. The CTA/NEA Interview Team will make a recommendation to the CTA Board of Directors.
4. The CTA Board of Directors' recommendation(s) will be presented to the California Caucus at the third California Caucus meeting.
5. Candidates must have a sixty percent (60%) vote of the Caucus in order to be recommended. *[Adopted 6/13]*

VI-5. California Caucus

1. The California Caucus, at the NEA Representative Assembly, shall consider endorsements at a meeting designated by the Chairperson of the California Caucus.

2. The ballot shall list the names of all candidates according to the CTA alphabet.
3. Candidates who have received State Council endorsement will be so designated.
4. Any State Council recommended candidate receiving a majority of the secret ballot vote will be an officially endorsed candidate of California.
5. A candidate not endorsed by State Council must have a sixty percent (60%) vote of the Caucus to be endorsed.
6. In the event a run-off election occurs at the NEA Representative Assembly, the California Caucus may consider non-endorsed candidates at whichever caucus meeting is appropriate for the final voting.
7. Any candidate receiving a majority vote of the secret ballot vote will be an officially endorsed candidate of the Caucus.

VII. Delegates to NEA Representative Assembly

VII-1. Allocation of Local Delegates to the NEA/RA

1. The NEA Constitution provides for the allocation of Delegate credentials to local affiliates as follows:
   a. Single locals with 76 or more members; and
   b. Combined locals each with fewer than 76 members.
2. Allocations are based on membership records as of January 15 of the calendar year in which the Representative Assembly convenes.
3. Locals with 76 or more members will be allocated Delegates in the ratio of one Delegate for each 150 NEA Active and Educational Support members or major fractions thereof.
4. A local with more than 75, but fewer than 226 members will be entitled to one (1) Delegate.
5. A local with more than 225 and fewer than 376 members shall be entitled to two (2) Delegates.
6. Locals with more than 75 members may not cluster with other locals.
7. Locals with fewer than 76 members may join together to form membership units for the purpose of representation.
8. Each local in a cluster of two (2) or more must have fewer than 76 members.
9. Allocation of credentials for such clustered locals shall be based on the ratio of 1:150 NEA Active and Educational Support members or major fraction thereof.
10. Terms for Local Delegates may range from one to three years.
11. There is no limit on the number of terms. The terms may be staggered.
12. Funding for Local Delegates shall be determined by the local.

VII-2. Election Requirements and Procedures for NEA/RA Local Delegate Positions

1. It is NEA policy that each state include ethnic minority Delegates in numbers commensurate with the population of the state. *(See Appendix D)*
2. It is CTA policy that the Association is committed to ethnic minority representation in the California delegation. *[Revised 6/12]*
3. A chapter and a cluster of chapters must follow the same requirements, as follows:
   a. There must be open nominations. All NEA members are eligible to nominate or be nominated for office.
   b. Declaration of Candidacy forms shall be readily available to members, stating requirements as to time and place of filing. **IT IS THE RESPONSIBILITY OF THE CANDIDATE TO ENSURE THAT THIS DOCUMENT IS RECEIVED BY THE DUE DATE AND TIME AT THE PROPER LOCATION.** *[Revised 6/14]*
   c. No less than fifteen (15) calendar days prior to an election, the local chapter shall notify members of the election.
   d. Candidates must not use any portion of dues money of the local, Service Center Council, state or national level to promote the candidacy.
   e. District email addresses and/or systems shall not be used for campaigning. *[Revised 6/12]*
   f. All NEA members within the chapter or cluster of chapters shall be eligible to vote.
   g. The time and place of the election must be designated.
   h. Candidates may run as both State and Local Delegates, but must decide which position to accept and notify the Service Center Council and local no later than the deadline stated on the NEA State and Local Delegate Elections Timelines approved by the CTA Board of Directors. The candidate shall relinquish all claims to the released position in writing. *[Revised 10/99, 6/12]*
   i. Elections shall be by secret ballot.
   j. There shall be a provision for write-in candidates.
   k. The election shall be by plurality vote. *[Revised 6/13]*
   l. When there is a tie in a plurality election, the following procedure shall be followed: *[Revised 6/14]*
      1. When there is a tie, the ballots shall be recounted.
      2. If the result is still a tie, then the elections committee chairperson shall:
         (a) Call the candidates (according to the CTA alphabet) and inform them of the tie and that a coin toss shall be used to determine the winner.
         (b) If the first candidate called wishes to remain in the race, the chairperson shall ask that candidate to choose “heads” or “tails” in the coin toss.

(c) The elections committee chairperson shall designate the time and place for the coin toss and inform the candidates, who may have an observer present. The observer may be the candidate.
(d) The elections committee shall note the coin toss on the CTA Official Teller's Report.
(e) The elections committee shall follow the established procedure in notifying the candidates of the results. *[Revised 6/11]*

m. If there is a tie among three or more candidates, contact the CTA Elections & Credentials Chairperson through the Governance Support Department. *[Revised 6/12]*

n. All candidates shall be ranked in the order of votes received.

[Renumbered 6/12]

4. A chapter or a cluster of chapters may waive the requirement for secret ballot election for NEA/RA local delegates and candidate(s) declared elected only if the following conditions have been met prior to the election being held:
   a. The chapter or cluster of chapters has adopted a governing provision or election policy allowing the practice for waiving the NEA/RA local delegates' elections secret ballot when the number of candidates is equal to or less than the number of delegate positions to be filled.
   b. The period for open nominations shall be no less than fifteen (15) calendar days.
   c. This election practice will not generate successor delegates unless the nomination process requires candidates for both regular and successor delegate positions.
5. The announcement of election results shall be made the next day after the votes are counted. *[Revised 6/10]*
6. The local shall retain all ballots and election records until the expiration of the term to which the delegate was elected. *[Revised 7/03]*

[Revised and renumbered 7/02]

VII-3. Time Schedule for Elections for NEA/RA Local Delegates

Whenever possible the local CTA chapters are encouraged to follow the same timeline as the state so that elections can be consolidated. Consideration must be given for vacations and year-round school calendars.

1. The specific timelines for elections for NEA Local Delegates shall be determined by each chapter or cluster of chapters, provided that names of Delegates are reported to the state by the required deadline.
2. The timeline shall include dates for:
   a. Deadline for receiving Declaration of Candidacy forms by members;
   b. Preparation of ballots: the ballot shall state the name of the office, the term, and the name of the candidate(s) who have filed declarations of candidacy within the timeline. The ballot shall include space for a write-in candidate, except in a run-off election; *[Revised 6/04]*
   c. Election in chapter;
   d. Counting of ballots by chapter elections committee;
   e. Deadline for receipt of Local Delegate election results to CTA Elections and Credentials Committee, c/o CTA Governance Support Department, P.O. Box 921, Burlingame, CA 94011-0921;
   f. Delegates who have been elected to both Local and State Delegate positions to notify the chapter and Service Center Council of the position accepted (Delegates may not hold both positions);
   g. Chapter president to notify CTA of names of Successor Local Delegates if an elected Local Delegate chooses to go as a State Delegate; *[Revised 6/13]*
   h. Deadline for filing a challenge to the election (date received, not date postmarked, three (3) calendar days after the announcement of election results, including any run-offs if necessary); *[Revised 6/10, 6/13, 6/14]*
   i. A copy of the challenge to be also filed with the CTA Elections and Credentials Committee;
   j. June 1 deadline for filing an appeal of the state's decision on a challenge with the NEA Credentials Committee.

VII-4. Successor Delegate Procedures for NEA/RA Local Delegate Positions

1. A successor delegate is the candidate with the next highest votes after the winners have been declared. The successor delegate will automatically be declared a Delegate when a vacancy occurs.

2. Only those members who are so certified are eligible to serve as Successor Delegates.
3. All candidates shall be ranked in order of votes received.

VII-5. Challenge Procedure – NEA/RA Local Delegate Elections

1. A challenging party(ies) must notify the chapter president and chapter election chairperson of a challenge in writing using the official Original Election Challenge Form *(See Appendix R)* within three (3) calendar days after the announcement of the results, including any run-offs if necessary, of the election. *[Revised 6/13]*
2. The challenging party(ies) shall notify the CTA President in writing concurrently with notifying chapter president.
3. The chapter elections committee shall have three (3) calendar days, commencing on the day the challenge was received and, in accordance with CTA's Bylaws and Standing Rules, to conduct an investigation of the challenged election for the purpose of ascertaining the facts; to attempt to reach local resolution; and to issue a written report to the chapter executive board regarding the validity of the challenge based on whether the alleged violation may have affected the outcome of the election. *[Revised 6/13]*
4. The chapter executive board must render a decision on the challenge and send a copy of the decision to the challenging party, all candidates on the ballot, the chapter elections committee chair, and the CTA President within three (3) calendar days following receipt of the report. *[Revised 6/13]*
5. Any member of the chapter executive board who was a candidate in the race that has been challenged, was named in the challenge, signed an individual witness documentation form, or whose immediate family member was a candidate in the race that has been challenged, shall recuse themselves from discussion of and voting on the challenge. *[Revised 6/14]*
6. If in the case where the majority of the chapter executive board is unable to act on the challenge the decision shall move to the Representative Council. In the absence of a Representative Council, the chapter shall contact the CTA Elections and Credentials Chairperson through the Governance Support Department to determine the next step. *[Revised 6/11, 6/12, 6/13]*
7. The challenging party or any candidate affected by the decision of the chapter executive board may file an appeal on the official CTA Appeal Form to the CTA President within three (3) calendar days from the date of the decision. The appeal shall include the information requested on the official CTA Appeal Form located in Appendix S of this manual. The appeal and all required documentation shall be received by the CTA President no later than 5:00 p.m. on or before the third (3rd) day. *[Revised 6/11, 7/12, 6/13]*
8. If the chapter executive board fails to act within six (6) calendar days of the original challenge, the challenging party(ies) may appeal in writing to the CTA President within three (3) calendar days from the date the decision would have been due by the chapter executive board. The appeal and all required documentation, as requested on the official CTA Appeal Form located in Appendix S of this manual, shall be received by the CTA President no later than 5:00 p.m. on or before the third (3rd) day. *[Revised 6/11, 6/12, 6/13]*
9. The CTA President shall refer the matter to the Chairperson of the Election and Credentials Committee.
10. Upon receipt of the appeal, the CTA Elections and Credentials Committee shall take jurisdiction of the challenge.
11. Within three (3) calendar days of receipt of the appeal, the Chairperson of the Elections and Credentials Committee and Board Liaison of the Elections and Credentials Committee shall conduct an investigation and determine whether:
    a. The challenge alleges a violation of a CTA election requirement;
    b. The challenge is supported by appropriate documentation;
    c. More information is needed, in which case, the information will be obtained via the most feasible method;
    d. The alleged violation may have affected the outcome of the election;
12. If it is determined that no basis for a challenge exists:
    a. The Chairperson of the Elections and Credentials Committee shall submit a written copy of the findings and recommendation(s) of the investigation team to the CTA President and CTA Board of Directors. *[Revised 7/97]*

b. The CTA Board of Directors shall act on the report at its first opportunity, and the approved actions shall be sent to the person(s) filing the challenge and to the chapter president. *[Revised 6/14]*

c. June 1 is the deadline for filing an appeal of the CTA Board of Directors decision on a challenge with the NEA Credentials Committee. *[Renumbered 6/14]*

VII-6. Allocation of State Delegates to the NEA/RA

1. Delegates shall be allocated to state affiliates in the ratio of one delegate for each 1,000 NEA Active and Educational Support members.
2. The term for State Delegate and Successor Delegate shall be one (1) year.
3. NEA policy requires that each state include ethnic minority delegates in numbers commensurate with the population of the state. *(See Appendix D)*
4. CTA policy requires that the Association is committed to an affirmative action program in all areas, including ethnic minority representation in the California delegation.

VII-7. Election Requirements for NEA/RA State Delegate Positions

Chapter presidents must provide members an opportunity to vote in all NEA Representative Assembly elections. Presidents do not have the option of deciding that a NEA election shall not be held.

State Delegates are required to attend all sessions of the California Caucus, NEA Representative Assembly, and take into consideration CTA policy when voting on NEA proposals.

1. Representation shall be determined on the basis of proportional representation by educational position in NEA Category 1, which includes NEA Active and Educational Support members who are not supervisors. *[Revised 6/12]*
2. Open nominations (any NEA member is eligible to nominate and be nominated for office).
3. In the event that there are no declaration of candidacy forms received for a position, the SCC's allocated delegate(s) will be reallocated to another SCC by the CTA Governance Support Department in accordance with CTA's allocation formula. *[Revised 6/14]*
4. All NEA members within a Service Center Council area shall be eligible to vote in their chapters for the number of delegates allocated to the Service Center Council.
5. An election by secret ballot 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.
6. Each ballot shall list names of candidates in the current CTA alphabetical order.
7. Elections must be by secret ballot.
8. Candidates may run as both State and Local Delegates, but must decide which position to accept and notify the Service Center Council and local in accordance with the NEA state and local delegate elections timelines. The candidate shall relinquish all claims to the released position in writing. *[Revised 10/99, 6/07]*
9. The election shall be by plurality vote. *[Revised 6/12]*
10. When there is a tie in a plurality election, the following procedure shall be followed:
    a. When there is a tie, the ballots shall be recounted.
    b. If the result is still a tie, then the elections committee chairperson shall:
        (1) Call the candidates (according to the CTA alphabet) and inform them of the tie and that a coin toss shall be used to determine the winner.
        (2) If the first candidate called wishes to remain in the race, the chairperson shall ask that candidate to choose "heads" or "tails" in a coin toss.
        (3) The elections committee chairperson shall designate the time and place for the coin toss and inform the candidates, who may have an observer present. The observer may be the candidate.
        (4) The elections committee shall note the coin toss on the Teller's Report.
        (5) The elections committee shall follow the established procedure in notifying the candidates of the results.
    c. If there is a tie among three or more candidates, contact the CTA Elections & Credentials Chairperson c/o the Governance Support Department. *[Revised 6/14]*

11. All candidates shall be ranked in the order of votes received.
12. Each Service Center Council shall make the results of the election known to the members as appropriate through any procedure which allows the members to obtain the information without unusual effort.
13. Each Service Center Council shall retain all ballots and election records for one (1) year following the election.

[Revised and renumbered 6/12, 6/14]

VII-8. Procedures and Guidelines for NEA/RA State Delegate Elections

1. Election procedures for conducting the election for State Delegates are the responsibility of the Service Center Council Chairperson, Service Center Council Elections Committee, and chapter presidents.
2. Service Center Council Chairperson shall contact the chapter presidents by phone, in person, by letter, or by e-mail, notifying them of the need to determine election timelines and procedures.
3. Each candidate who has filed a declaration of candidacy shall receive an acknowledgment of the filing.
4. Candidates must not use any portion of dues money of the local, Service Center Council, state, or national level to promote their candidacy.
5. District emails addresses and/or systems shall not be used for campaigning. *[Revised 6/12]*
6. The election for At-Large State Council Representatives may be conducted at the same time as the election for NEA State Delegates.
7. When the votes in a Service Center Council are set aside for various reasons, and those votes would change the outcome, the question of whether to count the ballots shall be sent to the Chairperson of the CTA Elections and Credentials Committee c/o the Governance Support Department for investigation and resolution. The decision of the CTA Elections and Credentials Committee is final. *[Revised 6/14]*
8. Locals shall submit to the Service Center Council the voted ballots, signature sheets/rosters, and a signature and ballot verification sheet *(see Appendix I)*. The envelopes must be retained by the local for one (1) year. *[Revised 6/12]*
9. The Service Center Council Elections Committee separates the voter roster/sign-in sheets from the ballots, puts all the ballots together and tallies all the ballots. The ballots should not be tallied by site. *[Revised 6/12]*

[Renumbered 6/12]

VII-9. Time Schedule for Elections for NEA/RA State Delegate Elections

1. The specific timelines for elections for NEA State Delegates shall be sent to the Service Center Council from CTA concurrently with the publication of the declaration of candidacy in the CTA official publication.
2. The timeline must be of sufficient length to allow for voting by mail where there are year-round schools.
3. The timeline shall include dates for:
   a. CTA to send state election procedures to Service Center Councils and chapters;
   b. CTA to send allocation of State Delegates to Service Center Councils;
   c. Declaration of Candidacy form to be printed in the official CTA publication;
   d. Deadline for Service Center Council Chairpersons to receive Declaration of Candidacy forms;
   e. Preparation of ballots: The ballot shall state the name of the office, the term, and the name of the candidate(s) who have filed declarations of candidacy within the timeline. The ballot shall include space for a write-in candidate, except in a run-off election; *[Revised 6/04]*
   f. State Delegate ballots to be sent from Service Center Councils to chapters;
   g. Election in chapters for State Delegates;
   h. Signature and ballot verification sheet, voted ballots, and voter roster/sign-in sheets to be sent from chapters to Service Center Council; *[Revised 6/12]*
   i. Counting of signature and ballot verification sheets and tallying of ballots by the Service Center Council Election Committee; *[Revised 6/12]*
   j. Deadline for receipt of State Delegate election results by the CTA Elections and Credentials Committee, c/o CTA Governance Support Department, P.O. Box 921, Burlingame, CA 94011-0921;

k. Deadline for Delegates who have been elected to both Local and State Delegate positions must notify the chapter and Service Center Council of the position accepted (delegates may not hold both positions);
l. Deadline for Service Center Council Chairperson to notify CTA of names of Successor State Delegates if an elected State Delegate chooses to go as a Local Delegate;
m. Deadline for filing a challenge to the election (date received, not date postmarked) is three (3) calendar days after the announcement of election results, including any run-offs if necessary; *[Revised 6/13, 6/14]*
n. A copy of the challenge must be also filed with the CTA Elections and Credentials Committee; and
o. June 1 is the deadline for filing an appeal of the state's decision on a challenge with the NEA Credentials Committee. *[Revised 7/96]*

VII-10. Student NEA Members

1. Election procedure for Student NEA Delegates must conform to CTA and NEA guidelines.
2. Delegates are allocated in the ratio of one Delegate for the first fifty (50) student members; two (2) Delegates for 750 members and an additional seat for each five hundred (500) student members thereafter.
3. Membership is based on student membership figures as of March 15 of the calendar year in which the Representative Assembly convenes.
4. A declaration of candidacy form, with instructions for filing of the form, shall be published in the official publication of CTA.
5. The statewide ballot shall be mailed to SCTA members.
6. Only student members may nominate, vote for, or serve as student delegates.
7. Student groups shall comply with NEA Bylaw 3-1.g in order to achieve ethnic minority representation as required.
8. The Student CTA President is responsible for election procedures.

VII-11. NEA Retired Members

1. CTA/NEA-Retired shall have open nominations and a secret ballot for all NEA Representative Assembly delegates.
2. Delegates will be allocated in the ratio of one (1) Delegate for the first fifty (50) retired members and an additional Delegate for each 1,000 NEA-R members thereafter.
3. Membership figures are based on NEA-R membership as of January 15 of the calendar year in which the Representative Assembly convenes.
4. A declaration of candidacy form, with instructions for filing the form, shall be published in the official publication of CTA.
5. Only NEA-R and NEA Retired Life members who also hold CTA/NEA Retired membership can vote for, or serve as, NEA-R delegates.
6. State NEA-R shall comply with NEA Bylaw 3-1.g in order to achieve ethnic minority representation. *[Revised and renumbered 6/04]*

VII-12. Successor Delegate Procedure for NEA/RA State Delegate Positions

1. A successor delegate is the candidate with the next highest votes after the winners have been declared. The successor delegate will automatically be declared a Delegate when a vacancy occurs.
2. Only those members who are so certified are eligible to serve as Successor Delegates.
3. All candidates shall be ranked in order of votes received.

VII-13. Challenge Procedure – NEA/RA State Delegate Elections

1. The announcement of election results shall be made the next day after the votes are counted.
2. A challenging party(ies) must notify the CTA President of a challenge in writing using the official Original Election Challenge Form *(See Appendix R)* within three (3) calendar days after the announcement of the results, including any run-offs if necessary, of the election. *[Revised 6/13]*
3. The CTA President shall refer the matter to the Chairperson of the Election and Credentials Committee.
4. Upon receipt of the appeal, the CTA Elections and Credentials Committee shall take jurisdiction of the challenge.

5. Within three (3) calendar days of receipt of the appeal, the Chairperson of the Elections and Credentials Committee and Board Liaison of the Elections and Credentials Committee shall conduct an investigation and determine whether:
   a. The challenge alleges a violation of a CTA election requirement;
   b. The challenge is supported by appropriate documentation;
   c. More information is needed, in which case, the information will be obtained via the most feasible method;
   d. The alleged violation may have affected the outcome of the election;
6. If it is determined that no basis for a challenge exists:
   a. The Chairperson of the Elections and Credentials Committee shall submit a written copy of the findings and recommendation(s) of the investigation team to the CTA President and CTA Board of Directors. *[Revised 7/97]*
   b. The CTA Board of Directors shall act on the report at its first opportunity, and the approved actions shall be sent to the person(s) filing the challenge and to the Service Center Council Chairperson.
   c. June 1 is the deadline for filing an appeal of the CTA Board of Directors decision on a challenge with the NEA Credentials Committee.

[Revised 6/10, 6/12, 6/13, 6/14]

VIII. Recall Procedures

VIII-1. Recall Petition

1. Any person or group within an electoral district desiring to recall its State Council Representative shall file a copy of a petition with the Chairperson of the CTA Elections and Credentials Committee c/o the Governance Support Department before it can be circulated. *[Revised 6/14]*
2. A petition cannot be filed until a Representative has served for at least six (6) months.
3. The petition must include the following information:
   a. Name of individual who is the subject of the recall;
   b. Electoral district;
   c. Date of petition;
   d. Name(s) of person(s) filing petition;
   e. Notation that "Each signature must be in ink";
   f. Space must be provided for the printed name, signature, chapter affiliation, and date of signing for each name on the petition.
4. Within fourteen (14) working days after receipt of the recall petition, the Chairperson of the Elections and Credentials Committee shall determine whether the petition contains the necessary information and inform the CTA President.
   a. If the petition contains the necessary information, the Chairperson of the Elections and Credentials Committee shall so notify the following:
      1. Petitioners;
      2. Individual who is the subject of the recall;
      3. President(s) of the electoral district, and;
      4. Other appropriate leadership.
   b. A copy of the petition shall be enclosed.
   c. If the petition does not contain the necessary information, the Chairperson of the Elections and Credentials Committee shall so notify the petitioner.

VIII-2. Recall Rules, Procedures and Timeline

If the petition contains the necessary information, the Chairperson of the Elections and Credentials Committee shall inform the petitioner and the individual who is the subject of the recall of the rules, procedures and timeline (beginning date and deadline date for gathering of signatures), and the need for protection of due process rights of the parties.

1. Monies received by a CTA chapter by way of dues, assessment or similar levy, a chapter's assets, facilities, staff, equipment, mailings, good will and credit, or in-kind services must not be used in the recall process.
2. No chapter may state or indicate its preference in the chapter's newspaper, newsletter, or communications to its members.
3. The timeline for gathering of signatures will commence the day after the Chairperson of the Elections and Credentials Committee notifies the petition circulator(s) and the individual who is the subject of the recall that the petition contains the necessary information.
4. A maximum of ninety (90) calendar days shall be permitted to obtain the signatures of at least twenty percent (20%) of CTA members from a single chapter electoral district or twenty-five percent (25%) or more of the CTA members from a multiple chapter electoral district on the petition. *[Revised 7/02]*
5. The signed petitions must be received by the CTA Elections and Credentials Committee by the specified deadline date. Postmarked date is not accepted. *[Revised 10/99*]
6. The CTA Elections and Credentials Committee shall have fifteen (15) working days after receipt of the petition to verify the CTA membership of the signers.
7. If there are insufficient signatures, the Chairperson shall notify the petition circulator(s) by mail of the number of signatures needed to qualify the petition.
8. The petition circulator(s) shall have an additional fifteen (15) calendar days from the date of the notification to gather and submit the necessary signatures. *[Revised 7/02]*
9. The Elections and Credentials Committee shall have ten (10) calendar days after receipt of the additional signatures to verify the CTA membership of the signers. *[Revised 7/02]*
10. Within five (5) working days of verification of CTA membership, the Chairperson of the Elections and Credentials Committee shall notify, by next day mail, the chapter president of a single chapter

electoral district, or the Service Center Council Chairperson of a multiple chapter electoral district, to submit the question of the recall of the Representative to the presidents of the chapters and to the State Council Representative(s) of the electoral district.

11. The notification shall indicate whether, if the recall election should result in the recall of the incumbent State Council Representative, to conduct an election for a new Representative to complete the term should be held at the same time as the recall election, or to conduct a separate election after the recall election has been completed.
12. The local president or Service Center Council Chairperson shall arrange to have the recall election initiated, including distribution of ballots, within fifteen (15) calendar days of receipt of the notification from the Chairperson of the Elections and Credentials Committee. *[Revised 7/02]*
13. The election must be concluded within fifteen (15) calendar days of distribution of the ballots. *[Revised 7/02]*
14. The election must be conducted in a democratic manner to include the following:
    a. Provisions for a secret ballot;
    b. Voter roster/sign-in sheets;
    c. Provisions for a post office box where ballots can be sent;
    d. Provision for vote requirement of at least two-thirds of votes cast by persons legally entitled to votes, excluding blanks and/or illegal ballots; and
    e. Provision for observers.
15. The president or Service Center Council Chairperson shall notify the Elections and Credentials Committee c/o the Governance Support Department of the result of the election within five (5) calendar days after the counting of the ballots. *[Revised 6/14]*
16. The Chairperson of the Elections and Credentials Committee shall certify the election and send a notification of such to the following:
    a. Local president;
    b. Petitioners;
    c. Individual who is the subject of the recall;
    d. Other appropriate leadership, and;
    e. Incumbent State Council Representative and candidates if an election for the new Representative is held at the same time.

IX. CTA Statewide Issues and Bylaw Amendments

IX-1. CTA Statewide Issues

A majority vote of the ballots cast shall be required to approve an issue.

IX-2. CTA Bylaw Amendments

ARTICLE XVI, AMENDMENTS, Section 3, Adoption of Amendments to Bylaws, pages 63-64, of the CTA Organizational Handbook states: Any amendment to these Bylaws may be adopted by any of the following processes: *[Revised 1/98]*

1. Approval by at least a two-thirds (2/3) vote of the Active and life members participating in a valid initiative or referendum election.
2. The affirmative vote by written ballot of at least two-thirds of the votes cast at the meeting of the State Council of Education at which such amendment is submitted for action, provided that at least a majority of the voting members of the Council, as defined in of Article V, State Council of Education, Section 2, Composition, page 51, of the CTA Organizational Handbook, vote affirmatively for the amendment regardless of the number registered for the meeting.
3. Prior to the written ballot, amendments shall be considered during a business session of the Council and may be modified by majority vote of the Council in any manner which does not increase their scope or impact.
4. The final written vote on the adoption of amendments at a meeting of the State Council shall be at polling places under regularly-adopted elections procedures designed to ensure that every voting Council member present at the meeting has a reasonable opportunity to cast a vote.

[Revised 3/73, 10/73]

CTA Declaration of Candidacy For Office

I hereby declare that I intend to be a candidate for the office of:

_____	CTA President	2 – 2 yr. terms
_____	CTA Vice President	2 – 2 yr. terms
_____	CTA Secretary-Treasurer	2 – 2 yr. terms
_____	CTA Geographical Director, District _____	3 – 3 yr. terms
_____	CTA Director, At-Large *	3 – 3 yr. terms
_____	NEA Director from California, District _____	2 – 3 yr. terms
_____	NEA Alternate Director, Seat _____	2 – 3 yr. terms
_____	CTA/ABC Committee Member, District _____	3 – 3 yr. terms
_____	CTA/ABC Committee Member, At-Large *	3 – 3 yr. terms
_____	CTA/NEA Coordinating Director	Coincides with NEA Director term

**Must be an ethnic minority (African American, American Indian/Alaska Native, Asian/Pacific Islander, or Hispanic) as defined in the CTA Bylaws and self-identified in CTA membership records.*

Name _____ School _____

(Please print name as you wish it to appear on the ballot. The name as listed shall be no more than 26 characters, including spaces, hyphens, and other punctuation marks.)

School Address _____ Home Address _____

City & Zip _____ City & Zip _____

School Telephone _____ Home Telephone _____

Personal Email Address: _____

(*Email address must not reference any association name, leadership position or school.)*

I certify that I am a member in good standing of the following: (please check)

☐ Chapter _____ CTA/NEA Member ID # _____

☐ California Teachers Association

☐ National Education Association **

** *For NEA positions, the candidate must have been an NEA member for the past two consecutive years. (NEA requirement)*

I understand that as a successful candidate, I shall:

a. Support CTA policy and State Council actions.
b. Refrain from endorsing policies and positions that are in conflict with CTA.

I hereby authorize _____ as my Campaign Manager and _____ as my Treasurer and they may make requests on my behalf.

Signature _____ Date _____

This declaration must be received, not postmarked, in the Governance Support Department, CTA, P.O. Box 921, Burlingame, CA 94011-0921; fifteen (15) calendar days before the State Council meeting at which names of candidates are announced to the State Council.

IT IS THE RESPONSIBILITY OF THE CANDIDATE TO ENSURE THAT THIS DOCUMENT IS RECEIVED BY THE DUE DATE AND TIME. *[Revised 7/02, 7/03, 6/06, 6/07, 6/10, 6/13]*

CTA Candidate Financial Disclosure Report

Candidate _____

Office_____

Individuals:	_____	Travel:	_____
		Telephone	_____
Candidate:	_____	Postage	_____
		Receptions	_____
In-Kind Goods or Services:	_____	Campaign Materials	_____
		Substitute's Pay:	_____
Other:	_____	Other	_____
Total Income:	_____	Total Expenses:	_____

Date:_____

Signed:_____

PLEASE RETURN TO:
CTA Elections and Credentials Committee
P.O. Box 921, Burlingame, CA 94011-0921

Appendix C – CTA Alphabetical Order

The CTA alphabetical order for 2014-2015 shall be:

D C V U Z M Y G L Q E N H O B A S W T J I R X F P K

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 be continue to be applied throughout the name including the first name. *[Revised 6/05, 6/06]*

Appendix D – Ethnic Minority Percentage

The ethnic minority percentage for 2014-2015 is 60%.

Appendix E – Summary of Campaign Publications

OFFICE	CA EDUCATOR ARTICLE	ELECTRONIC FLYER FOR STATE COUNCIL NOTICE AND ELECTRONIC PACKET
CTA President, CTA Vice President, CTA Secretary-Treasurer	DUE: In accordance with CA Educator deadline 400 words in length	DUE: 10 calendar days after 2nd State Council meeting One 8 ½ " x 11" page, one side only
CTA Board Member, CTA/ABC Committee Member	N/A	DUE: 10 calendar days after 3rd State Council meeting One 8 ½ " x 11" page, one side only
CTA Director At-Large, CTA/ABC Committee Member At-Large	N/A	DUE: 10 calendar days after 3rd State Council meeting One 8 ½ " x 11" page, one side only
CTA/NEA Coordinating Director	N/A	DUE: 10 calendar days after 3rd State Council meeting One 8-1/2" x 11" page, one side only
NEA Director	N/A	DUE: 10 calendar days after 2nd State Council meeting One 8-1/2" x 11" page, one side only
NEA Alternate Director	N/A	DUE: 10 calendar days after 3rd State Council meeting One 8-1/2" x 11" page, one side only

[Revised 6/13]

Appendix F – Summary of Election Procedures for Officers and Directors

Office	CTA President, Vice President, Secretary-Treasurer	NEA Director	NEA Alternate Director	CTA/NEA Coordinating Director	CTA Board Member and CTA/ABC Committee Member	CTA Director At-Large, CTA/ABC Committee Member At-Large (Permanent)
Announcement of Vacancy	1st State Council meeting in even numbered years	1st State Council meeting	2nd State Council meeting	2nd State Council meeting	2nd State Council meeting	2nd State Council meeting
Announcement of Candidates Names and Final Nominations	2nd State Council meeting	2nd State Council meeting	3rd State Council meeting	3rd State Council meeting	3rd State Council meeting	3rd State Council meeting
Qualifications	Member of CTA, NEA and a Chapter	Member of CTA and NEA for past 2 years	Member of CTA and NEA for past 2 years	NEA Director from California	Member of CTA, NEA and a Chapter	Member of CTA, NEA, and a Chapter; Racial and Ethnic Minority
Date Due for Declaration of Candidacy	15 calendar days before 2nd meeting or nomination from the floor at 2nd meeting	15 calendar days before 2nd meeting or nomination from the floor at 2nd meeting	15 calendar days before 3rd meeting or nomination from the floor at 3rd meeting	15 calendar days before 3rd meeting or nomination from the floor at 3rd meeting	15 calendar days before 3rd meeting or nomination from the floor at 3rd meeting	15 calendar days before 3rd meeting or nomination from the floor at 3rd meeting
Length of Combined Campaign Speeches	President: 10 min. Vice President: 5 min. Sec/Treasurer: 5 min, at 3rd meeting	5 minutes at 3rd meeting	5 minutes at 4th meeting	5 minutes at 4th meeting	5 minutes at 4th meeting	5 minutes at 4th meeting
Election Procedures for Caucus Nominee **Who May Vote**					State Council members and alternates employed in Dir. District, Ex-officio members (exclude affiliates)	
Length of Combined Campaign Speeches					Caucus campaign speech: 5 min; Questions and Answers: 10 min. at 3rd meeting	
Date of Election for Nominee					3rd State Council meeting in Caucus	
Vote Required to Win on the 1st Ballot					Majority	
Vote Required to Win Run-off					Majority – Two candidates receiving highest number of votes on first ballot	
Election Procedures by State Council **Who May Vote**	State Council members and alternates registered at 3rd meeting, except Ex-officio non - voting members	State Council members and alternates from Elec. District, and At-large Reps.	State Council members and alternates from Elec. District, and At-large Reps.	State Council members and alternates registered at 4th meeting, except Ex-officio non - voting members	State Council members and alternates registered at 4th meeting, except Ex-officio non - voting members	State Council members and alternates registered at 4th meeting, except Ex-officio non - voting members
Date of Election	3rd State Council meeting or by waiving the ballot at the 2nd State Council meeting	3rd State Council meeting or by waiving the ballot at the 2nd State Council meeting	4th State Council meeting or by waiving the ballot at the 3rd State Council meeting	4th State Council meeting or by waiving the ballot at the 3rd State Council meeting	4th State Council meeting or by waiving the ballot at the 3rd State Council meeting	4th State Council meeting or by waiving the ballot at the 3rd State Council meeting
Vote Required	Majority	Majority	Majority	Majority	Majority	Majority
Vote Required to Win Run-off	Majority – Two candidates receiving highest number of votes on first ballot	Majority – Two candidates receiving highest number of votes on first ballot	Majority – Two candidates receiving highest number of votes on first ballot	Majority – Two candidates receiving highest number of votes on first ballot	Majority – Two candidates receiving highest number of votes on first ballot	Majority – Two candidates receiving highest number of votes on first ballot

[Revised 7/02]

CALIFORNIA TEACHERS ASSOCIATION
STATE COUNCIL
TELLER'S REPORT
DATE

Office Name

Total Ballots Cast _____

Blank & Illegal Ballots _____

Legal Votes Cast _____

Number of Votes Needed to Elect _____

Candidates: Votes Received

Name of Candidate(s)

_____

_____

_____

Elections Comm. Chair.	Member	Member	Member
Member	Member	Member	Member
Member	Member	Member	Member

Time posted: _____

Appendix H(a) – Declaration of Candidacy for State Council Representative and Alternate

CALIFORNIA TEACHERS ASSOCIATION
DECLARATION OF CANDIDACY
FOR STATE COUNCIL REPRESENTATIVE AND ALTERNATE

This form must be returned (received, not postmarked), to the service center council for multiple chapter electoral district or to local chapter for single chapter electoral district. The information on this form will be kept confidential.

Election for Representative only, runner-up will become Alternate. At-Large candidates must be an ethnic minority as defined in the CTA Bylaws and self-identified in CTA membership records.

Candidate for:

☐ CTA State Council Representative
(Runner-up will become the Alternate)
Term is 3 years from 20___ to 20___;
OR completing unexpired term to 20___.

☐ CTA State Council Representative At-Large
(Runner-up will become the Alternate At-Large)

I am running for seat number _____ (if appropriate)

Please print:

Name _____
(Please print name as you wish it to appear on the ballot.)

Personal Email _____
(Email address must not reference any association name, leadership position or school.)

Home Address _____

School address _____

City and Zip _____

City and Zip _____

Home Phone ( ) _____

School Phone ( ) _____

I am a member of: ☐ California Teachers Association ☐ National Education Association and

☐ Chapter: _____

CTA/NEA Member ID #: _____
(ID # can be found on the CTA/NEA Membership Card.)

Electoral District: _____

Ethnicity: ☐ African American ☐ American Indian/Alaska Native ☐ Asian/Pacific Islander
☐ Caucasian ☐ Hispanic ☐ Other:

Gender: ☐ Female ☐ Male

I understand that the duties of State Council of Education Representative shall be to perform the following duties:
(CTA Bylaws, Article V, Section 6)

a. Regularly attend all meeting of the State Council of Education.
b. Participate actively in the work of committees to which he/she is assigned.
c. Become informed on professional and educational matters in the chapter(s) or organization represented and be prepared to make adequate presentation of proposals or recommendations originating in the chapter(s).
d. Report regularly to his/her chapter(s), regarding the deliberations and actions of the State Council of Education.
e. Attend and participate in the meetings and activities of the Service Center Council of which his/her chapter is a part.
f. Perform such other duties as may be assigned to representatives by action of the State Council of Education.

Campaign Statement: (optional)
Please use the following campaign statement/biographical sketch on the flyer that accompanies the ballot. I understand that only the first thirty (30) words will be used, but a reference to ethnic minority identification will not be counted in the limitation of words. *[Revised 6/11]*

_____

_____

_____

_____

_____

Signed _____ Date _____

IT IS THE RESPONSIBILITY OF THE CANDIDATE TO ENSURE THAT THIS DOCUMENT IS COMPLETED AND RECEIVED BY THE DUE DATE AND TIME. *[Revised 07/02, 07/03, 01/06, 6/07, 6/10, 6/14]*

Appendix H(b) – Declaration of Candidacy for State Council Representative and/or Alternate

CALIFORNIA TEACHERS ASSOCIATION
DECLARATION OF CANDIDACY
FOR STATE COUNCIL REPRESENTATIVE AND/OR ALTERNATE

This form must be returned (received, not postmarked), to the service center council for multiple chapter electoral district or to local chapter for single chapter electoral district. The information on this form will be kept confidential.

Separate Election is being conducted for Representative and/or Alternate. At-Large candidates must be an ethnic minority as defined in the CTA Bylaws and self-identified in CTA membership records.

Candidate for:

☐ CTA State Council Representative
☐ CTA State Council Alternate
Term is 3 years from 20___ to 20___; OR
Completing unexpired term to 20___.

☐ CTA State Council Representative At-Large
☐ CTA State Council Alternate At-Large
I am running for seat number _____ (if appropriate)

Please print:

Name _____
(Please print name as you wish it to appear on the ballot.)

Personal Email _____
(Email address must not reference any association name, leadership position or school.)

Home Address _____
City and Zip _____
Home Phone ( ) _____

School address _____
City and Zip _____
School Phone ( ) _____

I am a member of: ☐ California Teachers Association ☐ National Education Association and

☐ Chapter: _____

CTA/NEA Member ID #: _____
(ID # can be found on the CTA/NEA Membership Card.)

Electoral District: _____

Ethnicity: ☐ African American ☐ American Indian/Alaska Native ☐ Asian/Pacific Islander
☐ Caucasian ☐ Hispanic ☐ Other:

Gender: ☐ Female ☐ Male

I understand that the duties of State Council of Education Representative shall be to perform the following duties:
(CTA Bylaws, Article V, Section 6)

a. Regularly attend all meeting of the State Council of Education.
b. Participate actively in the work of committees to which he/she is assigned.
c. Become informed on professional and educational matters in the chapter(s) or organization represented and be prepared to make adequate presentation of proposals or recommendations originating in the chapter(s).
d. Report regularly to his/her chapter(s), regarding the deliberations and actions of the State Council of Education.
e. Attend and participate in the meetings and activities of the Service Center Council of which his/her chapter is a part.
f. Perform such other duties as may be assigned to representatives by action of the State Council of Education.

Campaign Statement: (optional)

Please use the following campaign statement/biographical sketch on the flyer that accompanies the ballot. I understand that only the first thirty (30) words will be used, but a reference to ethnic minority identification will not be counted in the limitation of words. *[Revised 6/11]*

_____

_____

_____

_____

_____

Signed _____ Date _____

IT IS THE RESPONSIBILITY OF THE CANDIDATE TO ENSURE THAT THIS DOCUMENT IS COMPLETED AND RECEIVED BY THE DUE DATE AND TIME. *[Adopted 6/14]*

Signature and Voted Ballot Verification

Please attach to voter rosters and ballots from each voting site. Copy if needed.

Signatures on the roster: _____

Number of **Voted** Ballots Received: _____

Verified by:_____

[Adopted 6/12]

CTA OFFICIAL STATE COUNCIL TELLER'S REPORT REPRESENTATIVE ELECTION

COPIES OF THE BALLOT AND TIMELINE FOR THIS ELECTION MUST BE SUBMITTED WITH THIS TELLER'S REPORT.

This form must be filled out completely

❑ We are using the numbered seat system ❑ We are not using the numbered seat system

CHAPTER/MULTIPLE GROUP NAME:_____

SERVICE CENTER COUNCIL NAME: _____

Is this a run-off election? ❑ No ❑ Yes

If yes, please attach the Official State Council Teller's Report from the election that caused the run-off.

Representatives must be elected by a majority vote (more than half of the legal votes cast)
At-Large Representatives are elected by plurality

	State Council Representative Term of office: _____ Number of seats for this term: ____		**State Council Representative** Term of office: _____ Number of seats for this term: ____	
Total Ballots Cast				
*Blank Ballots				
Illegal Ballots				
Legal Ballots Cast				
Votes needed to win	Majority		Majority	
List All Candidates on Ballot	**Candidate Name**	**Votes Received**	**Candidate Name**	**Votes Received**
List Write-Ins (if any)				

*A **blank ballot** is defined as not having a vote marked for a position on a ballot that has been cast.

List Reason(s) for Illegal Ballots: _____

PLEASE PRINT CLEARLY

Elections Committee Chair
Email Address: _____
Phone Numbers
Home: _____
Cell: _____
Chapter Office: _____

Required Signatures
Minimum of two (2)

_____
Elections Committee Chair

_____
Elections Committee Member

_____
Elections Committee Member

[Revised 6/05, 6/06, 6/10, 6/12, 6/13]

REPORT OF RESULTS OF ELECTIONS OF STATE COUNCIL REPRESENTATIVE(S)

Chapter/Multiple Group: _____

Service Center Council: _____

BEFORE PROCEEDING: Representatives reported here must have accepted to serve in this position.

Representative's name: _____ Member # _____

Gender: _____ Ethnicity (Optional): _____

Mailing Address: _____

City: _____ Zip Code: _____

Daytime Telephone: _____ Evening Telephone: _____

Cell Phone Number: _____ Personal Email Address: _____

Representative's Chapter: _____

Term begins: (*Check one)* ❑ From the date of the election **OR** ❑ From June 26, _____

Term ends: June 25, _____

Representative's name: _____ Member # _____

Gender: _____ Ethnicity (Optional): _____

Mailing Address: _____

City: _____ Zip Code: _____

Daytime Telephone: _____ Evening Telephone: _____

Cell Phone Number: _____ Personal Email Address: _____

Representative's Chapter: _____

Term begins: (*Check one)* ❑ From the date of the election **OR** ❑ From June 26, _____

Term ends: June 25, _____

Please enclose CTA Official State Council Representative TELLER'S REPORT WITH A COPY OF THE BALLOT AND TIMELINE FOR THIS ELECTION
and mail to: CTA Committee on Elections
c/o Governance Support Department
P.O. Box 921
Burlingame, CA 94011-0921
or fax to: 650-552-5010

ELECTIONS COMMITTEE

PRINTED NAME Required Signatures: Minimum of two (2)

_____ _____
Chairperson

_____ _____
Committee Member

_____ _____
Committee Member

[Revised 6/05, 6/10, 6/12]

Date: _____

Appendix K – Official State Council Teller's Report – Alternate Election

CTA OFFICIAL STATE COUNCIL TELLER'S REPORT
ALTERNATE ELECTION

COPIES OF THE BALLOT AND TIMELINE FOR THIS ELECTION MUST BE SUBMITTED WITH THIS TELLER'S REPORT.

This form must be filled out completely

❑ We are using the numbered seat system ❑ We are not using the numbered seat system

CHAPTER/MULTIPLE GROUP NAME:_____

SERVICE CENTER COUNCIL NAME: _____

Is this a run-off election? ❑ No ❑ Yes

If yes, please attach the Official State Council Teller's Report from the election that caused the run-off.

Alternates must be elected by a plurality vote

		State Council Alternate Term of office: _____ Number of seats for this term: ___		**State Council Alternate** Term of office: _____ Number of seats for this term: ___	
Total Ballots Cast					
*Blank Ballots					
Illegal Ballots					
Legal Ballots Cast					
List all candidates on ballot if: *(please check)* ❑ Separate election was conducted	List all runners-up from Representative election if: *(please check)* ❑ Runners-up become Alternate(s)	**Candidate Name**	**Votes Received**	**Candidate Name**	**Votes Received**
List Write-Ins (if any)					

*A **blank ballot** is defined as not having a vote marked for a position on a ballot that has been cast.

List Reason(s) for Illegal Ballots: _____

PLEASE PRINT CLEARLY

Elections Committee Chair
Email Address: _____

Phone Numbers
Home: _____
Cell: _____
Chapter Office: _____

Required Signatures
Minimum of two (2)

Elections Committee Chair

Elections Committee Member

Elections Committee Member

[Revised 6/05, 6/06, 6/10, 6/12, 6/13]

REPORT OF RESULTS OF ELECTIONS OF STATE COUNCIL ALTERNATE(S)

Chapter/Multiple Group: _____

Service Center Council: _____

BEFORE PROCEEDING: Alternates reported here must have accepted to serve in this position.

Alternate's name: _____ Member # _____

Gender: _____ Ethnicity (Optional): _____

Mailing Address: _____

City: _____ Zip Code: _____

Daytime Telephone: _____ Evening Telephone: _____

Cell Phone Number: _____ Personal Email Address: _____

Alternate's Chapter: _____

Term begins: (*Check one)* ❑ From the date of the election **OR** ❑ From June 26, _____

Term ends: June 25, _____

Alternate's name: _____ Member # _____

Gender: _____ Ethnicity (Optional): _____

Mailing Address: _____

City: _____ Zip Code: _____

Daytime Telephone: _____ Evening Telephone: _____

Cell Phone Number: _____ Personal Email Address: _____

Alternate's Chapter: _____

Term begins: (*Check one)* ❑ From the date of the election **OR** ❑ From June 26, _____

Term ends: June 25, _____

Please enclose CTA Official State Council Alternate Election TELLER'S REPORT WITH A COPY OF THE BALLOT AND TIMELINE FOR THIS ELECTION
and mail to: CTA Committee on Elections
c/o Governance Support Department
P.O. Box 921
Burlingame, CA 94011-0921
or fax to: 650-552-5010

ELECTIONS COMMITTEE

PRINTED NAME Required Signatures: Minimum of two (2)

_____ _____
Chairperson

_____ _____
Committee Member

_____ _____
Committee Member

[Revised 6/05, 6/10, 6/12]

Date: _____

CALIFORNIA TEACHERS ASSOCIATION
State Council Representative/Alternate Election
Numbered Seat Report

IF YOU ARE USING THE NUMBERED SEAT SYSTEM
This Report Must Be Completed and Submitted After Every Election

Seat #	Representative	Term Number (1st, 2nd, 3rd)	Term Begins	Term Expires
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				

Alternates

	Term Number (1st, 2nd, 3rd)	Term Begins	Term Expires

Appendix M – Process to Declare a State Council Seat Vacant

Following a State Council Representative's resignation, an election *cannot* be held until the CTA Board of Directors has declared the seat vacant. Any elections conducted prior to a seat being declared vacant will be considered invalid.

Below are the steps that must be followed to declare a State Council Representative seat vacant:

1. Once a State Council Representative has resigned, the local unit or the Representative must notify CTA by submitting a copy of the Representative's written resignation letter to the CTA President, c/o the Governance Support Department, P.O. Box 921, Burlingame, CA 94011-0921 or fax to (650) 552-5010.

2. The resignation will be presented to the CTA Board of Directors at its next meeting to declare the seat vacant.

3. Once the seat has been declared vacant by the CTA Board of Directors, the local unit will be notified by the CTA Elections and Credentials Committee that an election is to be held for that State Council seat. Only then may a State Council Representative election be held for the vacant seat.

Appendix N – Campaign Violation Complaint Form

CAMPAIGN VIOLATION COMPLAINT FORM

Complaints must be filed within forty-eight (48) hours of becoming aware of the violation in order to be considered by the CTA Elections & Credentials Committee. This form can only be used prior to the election taking place.

Your Name: _____ **Phone # (cell preferred):** _____

Your Chapter Name or Multiple:_____

Your State Council Committee: _____

Candidate/Campaign Committing the Violation: _____

This form is to be used for campaign violations for only the following offices:

CTA President
CTA Vice President
CTA Secretary-Treasurer
NEA Directors & Alternate Directors
CTA Board of Directors & Director At-Large
CTA/ABC Committee Members & At-Large Members
CTA/NEA Coordinating Director

Description of the Violation: *(Be specific, include relevant dates, times, place, location. Attach any relevant documentation).*

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

List any witnesses to the violation: _____

_____

Please submit the completed form to the CTA Elections & Credentials Chairperson if at a State Council meeting. If not at a State Council meeting, mail to CTA Elections & Credentials Committee c/o Governance Support Department, 1705 Murchison Drive, Burlingame, CA 94010.

For Office Use Only:

Accept_____ **Deny**_____

Comments: _____

Appendix O – California Teachers Association Rules and Ethical Conduct in Campaigning

To be meaningful, an election must be free and decided by informed voters.

Every person in the electorate should have a keen sense of ethical conduct. Each candidate, supporter, or voter has a serious responsibility to make the democratic process work. Self-discipline is needed in establishing and maintaining a sense of conduct, and, while difficult, discipline is preferable to detailed rules.

Though lacking in specific rules, ethical conduct need not be a loose or vague concept. Clear, honest, conscientious answers to relevant questions should define ethical conduct in a wide variety of political situations.

Rules and ethical conduct are particularly important to the State Council of Education. It has been entrusted with the formulation of policy leading ultimately to making teaching the pre-eminent profession. Its members, whether working on matters of public or self-interest, must work together. In order to perform its functions, the State Council must be made up of members who differ in points of view, rise above personal differences, and strive collectively to achieve the goals of the profession. Since overzealous campaigning is likely to strain or damage these good relations, every person in the State Council or in a campaign should follow the dictates of ethical conduct and the rules for election campaigning.

Approved by CTA Board of Directors, December 1975
Adopted by State Council, January 1976
Amended by CTA Board of Directors, June 1991
Amended by CTA Board of Directors, June 2008

Appendix P – CTA Recall Petition

Pursuant to the provisions of Article IV, Section 3 of the California Teachers Association Bylaws, the undersigned members of the California Teachers Association submit this petition signed by 25% of the voting members of the State Council of Education and respectfully seek the recall and removal of

_____

from the office(s) of _____.

Names(s) and chapter affiliate(s) of person(s) filing petition.

Name	***Chapter Affiliate***

Registered, prior to circulation, with the Secretary of the California Teachers Association on (date) _____ and filed with the Secretary on (date) _____ within 30 days of the end of circulation.

Each signature must be in ink.

Print Name	***Signature***	***Chapter Affiliation***	***Date***

Appendix Q - CTA Challenge Procedures – Local/Service Center Council Elections

"Challenges for election of State Council Representatives and Alternates, State and Local delegates to NEA RA follow procedures in the CTA Elections Manual."

Local/Service Center Council Level
Challenge filed at local unit level following local unit procedures provided in local governance documents within ten (10) calendar days after the announcement of the results of the election.

Local Election Committee
The local election committee has ten (10) calendar days upon receipt of the challenge to investigate and report their recommendations to the unit's governance body based on the results of the investigation.

Local Governance Body
The local governance body has ten (10) calendar days to render a decision and to issue that decision in writing to the challenging parties, all candidates on the ballot, and the elections committee chair.

CTA Level
If the governance body fails to act within the ten (10) calendar days, the challenging party(ies) may file an appeal on the official CTA Appeal Form to the CTA President who shall refer the challenge to the Chairperson of CTA Elections and Credentials Committee.

The challenging party or any candidate affected by the written decision of the unit's governance body may file an appeal on the official CTA Appeal Form within ten (10) calendar days from the date of the decision of the unit's governance body to the CTA President who shall refer the challenge to the Chairperson of CTA Elections and Credentials Committee. Such appeal shall include the information requested on the official CTA Appeal Form.

The challenge appeal and all required documentation shall be received by the CTA President no later than 5:00 P.M. on or before the tenth (10th) day.

CTA Elections Committee Level
The CTA Elections and Credentials Committee investigates the challenge and determines actions to be recommended to the President**.** At the direction of the CTA President, the CTA Elections and Credentials Committee initiates appropriate action and submits a report of findings and recommendations to the CTA President and the CTA Board.

CTA Board of Directors Level
CTA Board shall send approved recommendations to the Local President/ Service Center Council Chairperson, to the appealing party(ies), and to members who provided information to the CTA Elections and Credentials Committee. The CTA Elections and Credentials Committee report to the Board and documents obtained in regards to the challenge are confidential.

Monitoring
CTA Elections and Credentials Committee will provide follow-up contact with the local chapter as necessary concerning progress of recommendations.

CTA Geographic Director Level
If a chapter does not respond to the recommendations in a timely manner, the Board Liaison of the CTA Elections and Credentials Committee will contact the Geographic Director.

Follow-Up Contacts
When the CTA Elections and Credentials Committee makes follow-up contact with the local unit, notification will be made to the CTA President and the Geographic Director.

CTA President and CTA Board of Directors
Whenever the CTA Elections and Credentials Committee has been unsuccessful in working with the chapter to implement recommendations, the CTA President and Board of Directors will be notified for action.

[Revised 6/04, 6/06, 6/08, 6/10, 7/12, 6/13]

Appendix R – Original Election Challenge Form

Please remember that a challenge to a local chapter/unit must first go to the local elections committee chairperson and local president. If the findings of the local elections committee did not satisfy the challenger(s), within 10 days of those findings, then the exact same challenge may be appealed to the CTA president along with the official CTA Appeal Form located in Appendix S. (Note: Rules governing State Council elections are located in the white manual section of this *CTA Elections Manual*.)

***Challenges to any State NEA RA Delegate elections must be filed directly with the CTA President.**

In order to file a challenge to a unit election, the challenger(s) shall complete the following items and attach copies of all documents required to support the challenge:

The challenge as represented in this form, with attachments, shall first be submitted to the unit's election committee chairperson and president within the timelines as specified in CTA's *Requirements for Chapter Election Procedures* shall be followed.

I/we wish to file a challenge to an election as follows:

Challenger 1 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

Challenger 2 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

(If there are additional chapter/unit members to challenging the election, please include their information on a separate page & attach.)

Type of Election/Officer position(s) being challenged (check only those that are being challenged):

- ❑ President
- ❑ Vice President
- ❑ Secretary and/or Treasurer
- ❑ Director(s)
- ❑ State Council Representative
- ❑ State Council Alternate
- ❑ Local NEA RA Delegate
- ❑ State NEA RA Delegate*
- ❑ Other _____

Election Dates: _____ Date(s) Election Held

_____ Date Results Posted (including any run-offs if necessary)

Witnesses: Individuals who can serve as witnesses, what they can attest to, and contact information for each:

Witness 1 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

Witness 2 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

(If there are more witnesses, please include their information on a separate page and attach.)

Chapter Information:

Chapter Name:	Office #:
Chapter Email:	Fax #:

Chapter President Name:	President's Phone #:
President's Email Address:	

Chapter Elections Committee Chair Name:	Elections Chair Phone #:
Elections Chair's Email Address:	

Attach the following:

1. Cite the local bylaws, standing rules, and/or *CTA Elections Manual* section(s) and then summarize how and when they were violated.
2. Copies of election materials, for example: timelines, instructions, chapter literature related to the election, campaign flyers, copy of ballot, copy of teller's report, etc.
3. Local unit bylaws and standing rules.
4. Individual Witness Documentation form(s) if any witnesses are reported above.

[Revised 6/11, 6/13, 6/14]

Individual Witness Documentation

Witness 1 Name (please print) ______________________

Do you believe you witnessed an election violation? ❑Yes ❑No
If yes, please briefly describe the election violation:

____
____
____
____
____
____
____

Witness
Signature ______________________ Date ______________

✂- -

Individual Witness Documentation

Witness 2 Name (please print) ______________________

Do you believe you witnessed an election violation? ❑Yes ❑No
If yes, please briefly describe the election violation:

____
____
____
____
____
____
____

Witness
Signature ______________________ Date ______________

[Adopted 6/14]

Appendix S – Official CTA Appeal Form

TO: CTA President

I/we wish to file an appeal to the decision of my unit's governance body in response to an election challenge. (Please check):
- ❑ I am the original challenger.
- ❑ I am not the original challenger, but I am a candidate affected by the decision of my unit's governance body in response to an election challenge.

Appealer Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

Chapter Information:

Chapter Name:	Office phone & email:
Chapter President:	President phone & email:
Chapter Elections Committee Chair:	Elections Committee Chair phone & email:

Type of Election/Officer position(s) being challenged (check only those that are being challenged):

- ❑ President
- ❑ Vice President
- ❑ Secretary and/or Treasurer
- ❑ Director(s)
- ❑ State Council Representative
- ❑ State Council Alternate
- ❑ Local NEA RA Delegate
- ❑ Other _____

Election Dates: _____ Date Ballots Counted; _____ Date Results Posted (including any run-offs if necessary)

Challenge Dates: _____ Date Original Challenge Filed with Local; _____ Date Local Decision was Made

Result of Local Decision: (Check all that applies)
- ❑ Challenge denied
- ❑ Election results upheld
- ❑ Other: (please specify)
- ❑ Challenge upheld
- ❑ Election to be re-run

Attach the following:
1. If you are the original challenger, attach your original challenge form. If you are not the original challenger, you may submit this form by itself.
2. Copies of election materials, for example: timelines, instructions, chapter literature related to the election, campaign flyers, copy of ballot, copy of teller's report, etc.
3. Local chapter executive board's written decision.

[Adopted 6/13]

Appendix T - Sections of CTA Bylaws Pertaining to CTA Elections

Pertinent sections of the CTA Bylaws that are related to elections are included in the *Elections Manual*, which is a Standing Rule.

ARTICLE IV — INITIATIVE, REFERENDUM, AND RECALL

SECTION 3. Recall The State Council of Education shall have the authority to recall from office any person or persons holding office by virtue of having been elected by the State Council of Education. (Amended January 1998)

a. **Registration and Circulation of Recall Petitions**. Recall petitions must be registered with the Secretary-Treasurer prior to their circulation and shall use the form prescribed in the Standing Rules. These petitions shall be valid for a period of ninety (90) days. In the event that the proposed recall is for the person holding the office of Secretary-Treasurer, the request to register the petition shall be made to the President who shall, with the advice and consent of the Board of Directors, appoint an acting Secretary to handle the official acts required by the Secretary-Treasurer in connection with recall, as described in this Article. (Amended January 1998)

b. **Signature Requirements.** Only signatures obtained within the registration period shall be considered valid. Petitions must be signed by 25 percent (25%) or more of the voting members of the State Council of Education. (Amended January 1998)

c. **Filing and Verification of Recall Petitions**. Completed petitions must be filed with the Secretary-Treasurer within thirty (30) days of the end of the circulation period specified at the time of their circulation. The Secretary-Treasurer shall complete an appropriate verification process to determine the validity and sufficiency of the signatures within an additional thirty (30) day period. i (Amended January 1998)

d. **Report to the Board of Directors.** The Secretary-Treasurer shall report to the Board of Directors at the time of registration of a recall petition and again at the Board meeting following the close of the verification period. (Amended January 1998)

e. **Call of Election**. When it has been determined that a recall petition is valid, the Board of Directors shall publicize such request in the official publication of the Association within sixty (60) days. The question of recall shall be submitted to a vote of the State Council of Education at the first meeting following publication. (Amended January 1998)

f. **Action by State Council of Education**. If two-thirds of the members of the State Council of Education present vote to recall, the office shall immediately be declared vacant. (Amended January 1998)

g. **Supplementary Rules.** Supplementary rules governing recall may be adopted and published in the official publication and by the same manner as are prescribed for other elections within the Association. (Amended April 1960, June 1971, March 1973, March 1977, May 1977, June 1988, January 1998)

ARTICLE V — STATE COUNCIL OF EDUCATION

SECTION 2. Composition. The State Council of Education shall be composed of elected voting representatives together with ex officio voting and non-voting members as prescribed below. Elected voting representatives shall include those elected from electoral districts and those elected to meet racial/ethnic minority guarantees. (Amended January 1990, January 1998)

a. **Electoral District Representatives**. Except for electoral districts established to provide representation for members of CTA/NEA-Retired, an electoral district shall consist of one or more chapters of Active or Student members.

   (1) Chapters of Active K-12 members, Active higher education members, and Student members shall not be combined into the same electoral district. (Amended January 1998)

   (2) The boundaries of electoral districts shall be established by the State Council periodically following a review not less often than each three years. (Amended January 1998)

   (3) Chapters shall be grouped to ensure that all chapters are in an electoral district large enough to be entitled to elect at least one representative. (Amended January 1998)

   (4) The representation ratio for State Council shall be adjusted each year by a percentage amount, not to exceed the statewide percentage change in Association membership from the previous fiscal year. The ratio shall be a part of the Representation Report adopted by the State Council. (Amended January 1998)

   (5) The number of representatives shall be established in such a manner that the final voting representation on the Council shall meet the test that 50.1 percent of the State Council representatives shall represent at least 45.1 percent of the Association members. (Amended June 1991, January 1993, January 1998)

b. **Electoral District Retired Representatives**. Four (4) electoral districts shall be established to provide State Council representation for members of CTA-Retired. The Board of Directors shall define the boundaries of the electoral districts for Retired representatives. (Adopted June 1991)

c. **Racial and Ethnic Minority Guarantees**. An annual ethnic census of the electoral district voting representatives shall be made to establish the proportion of such persons who are members of racial/ethnic minorities in the categories of American Indian/Alaska Native, Asian/Pacific Islander, African American, and Hispanic. This proportion shall be compared with the proportion of all California public school teachers who are members of these minority groups. A determination shall be made of the number of additional representatives required to bring the proportion of minority voting representatives of the State Council so as to equal the proportion of those teaching in the California public schools. This number shall constitute the number of vacancies to be allocated on a one-person, one-vote basis among the geographical boundaries of the Service Center Councils for election. When an at-large racial/ethnic minority seat is established, it shall exist for nine years. (Amended February 1981, January 1991, March 1991, January 1998)

d. **Ex Officio Voting Members**. (Renumbered January 1990)
   (1) The members of the Board of Directors of the Association.
   (2) The members of the Board of Directors of the National Education Association from California.

e. **Ex Officio Non-voting Members**. One representative from each statewide non-governance (professional organization) affiliate. (Amended October 1978 to be effective July 1, 1979)

SECTION 3. Qualifications. The following qualifications must be met in order to be elected or continue as a voting representative to the State Council of Education within the appropriate category of membership: (Amended January 1998)

a. Must be an Active, Student member of the Association, or a CTA/NEA-Retired member. (Amended June 1991, January 1998)

b. Must be an Active, Student, or a NEA-Retired member. (Amended June 1991, January 1992, January 1998)

c. Must be an Active or Student member of a chapter of the Association where such membership is available, provided that membership in no more than one such chapter shall be required. (Amended October 1978 to be effective July 1, 1979)

d. For eligibility to serve as a Retired representative, s/he must have held Active CTA membership at the time s/he retired and must reside in the Retired Electoral District s/he is elected to represent. (Adopted June 1991)

SECTION 4. Election and Term of Office of Voting Representatives. The provisions of this Section shall apply to representatives elected from electoral districts and to those elected for purposes of racial/ethnic minority guarantees. (Amended January 1990, January 1998)

a. **Election.** All elections of voting representatives shall be conducted by an open nomination and secret ballot process. (Amended January 1998)
   (1) Representatives from electoral districts shall be chosen by and from an election among all Association members contained within the electoral district. The chapter governance bodies for single-chapter electoral districts shall conduct and certify their own elections. The geographical Service Center Council containing the largest share of members shall conduct and certify the election for a given multi-chapter electoral district. Each electoral district shall guarantee racial/ethnic minority representation among its total delegation which is at least proportional to its racial/ethnic minority membership.
   (2) Representatives to meet racial and ethnic minority guarantees shall be chosen by and from an election among all the Active members contained within the Service Center Council boundaries to which the vacancies are allocated. The Service Center Council shall conduct and certify the election.

b. **Term of Office**. The term of office of elected representatives, with the exception of representatives elected by the Student California Teachers Association, shall be three years and shall expire June 25 of the year ending the term. When a new office is initiated creating two or more offices in an electoral district, such districts may elect representatives initially for less than the full three-year term to effect staggered terms. Representatives shall be eligible for reelection but no person may serve more than three consecutive three-year terms. No person may serve more than eleven consecutive years, including completed and/or extended terms, without a break in service of at least one year. No person will be eligible for election for any term which would provide total service greater than eleven consecutive years. (Amended February 1981, October 1981, January 1984, October 1987, January 1998)
   (1) The term of office of a racial and ethnic minority representative shall end on the June 25 immediately following the completion of three years from the date of election. (Amended October 1987, January 1990, January 1998)
   (2) Whenever an electoral district gains substantially in membership so as to be entitled to one or more additional representatives based on the full ratio of members per allocated representatives, the Council may establish such additional allocation(s), following completion of prescribed procedures for study,

verification, and report/recommendation to the Council. (Adopted October 1981; Amended January 1998)

(3) Whenever an electoral district loses membership and is over-represented by one or more excess representatives, the following shall apply within the year following the decrease in membership: (Amended January 1998)

(a) If there are sufficient terms expiring that an open election can be held for the newly established decreased allocation, an election shall be held for the appropriate number of open seats.

(b) If sufficient terms expire which would eliminate the excess representation and no incumbent otherwise eligible to seek reelection is thereby deprived of doing so, no further action shall be required, and all elections to fill expiring terms thereafter shall be held as regularly scheduled.

(c) If sufficient terms do not expire which would eliminate the excess representation, all terms shall expire and an open election shall be held to fill the allocated seats. Those incumbents who are reelected shall be assigned to the same term previously held. (Adopted October 1981, Amended March 1985)

(d) If a midterm vacancy occurs, that seat shall be eliminated reducing the overrepresentation by one seat. (Adopted February 2013)

(4) Bylaws of the Student California Teachers Association may provide for terms of less than three years duration. (Adopted January 1984, Amended January 1998)

c. **Recall.** The electorate which chooses an elected representative shall have the power of removal by a two-thirds vote in a recall election held pursuant to the election procedures. (Amended January 1998)

d. **Vacancies.** Vacancies in the office of elected representatives shall be deemed to exist in the event of resignation, death, recall, or inability to serve, or the elected representative is no longer employed to perform professional educational work within the electoral district from which s/he was elected. (Amended January 1992, January 1998)

(1) Elections shall be held to fill vacancies as soon as practicable. The term of office of the new representative shall be from the date of the elections until the completion date of the term filled. (Amended January 1998)

(2) The question of inability to serve shall be deemed to arise in the event of absence from two meetings during any single membership year or any two consecutive meetings. The Board of Directors shall notify the representative after the first absence. Prior to declaring a seat vacant, the Board of Directors may consider any extenuating circumstances, including but not limited to, official leaves of absence from teaching, illness, and/or other personal emergency. The Board shall also take into consideration whether or not an elected alternate was available and notified to attend in the place of the regular delegate. Actions by the Board of Directors to declare a vacancy may be appealed to the next regular meeting of the State Council. Actions on the appeal by the Council shall be deemed to be final. (Amended March 1983, June 1988, June 1992)

(3) The Board of Directors may grant leaves of absences on a case by case basis.

e. **Temporary Loss of Representation Delinquency in Dues Transmittals**. Payment and transmittal of dues on a timely basis is a prerequisite for representation on the State Council of Education. The Council may adopt policies setting forth standards for determination that a condition of delinquency exists. Such policies shall include provisions for formal notice of delinquency by the Board of Directors; a right to a due process hearing on the facts; the right to a timely appeal to the Council of any adverse decision contemplated as a result of the hearing prior to loss of representation or other rights; and the procedure for curing the delinquency. In cases where a representative is elected from a multi-chapter district, provisions shall be made for safeguarding the representation rights for those chapters which are in current dues status. (Adopted October 1981, Amended October 1978 to be effective July 1, 1979)

SECTION 5. Alternates. In the event an elected Representative is unable to attend a meeting of the State Council of Education, an elected Alternate shall be designated using the following process: (Amended October 1978, October 1995)

a. **Single Chapter.** In an electoral district comprised of a single chapter, an elected Representative who is unable to attend such a meeting shall notify the president of the chapter, who shall designate an Alternate in a method set forth in the bylaws or standing rules of the chapter. (Amended July 1999)

b. **Multiple Chapter.** In an electoral district comprised of two or more chapters, an elective Representative who is unable to attend such a meeting shall immediately notify the CTA President through the Governance Support Department. In an electoral district comprised of two or more chapters, Alternates in multiple electoral districts shall be selected on the basis of seniority and the use of a rotation method for each meeting that an Alternate is needed. If seniority is equal among Alternates, then the CTA alphabet will be used to determine which senior Alternate will be contacted by the Governance Support Department and notified to attend. The rotation would become effective with the first State Council meeting. If an alternate

is unable to attend a meeting, the Alternate shall retain his/her place in the rotation order. (Amended March 1991, June 1992, October 1995, January 1998, July 1999)

c. In the event a Representative in a multiple electoral district is absent from Council for more than one meeting, due to a leave of absence approved by the CTA Board of Directors, the same Alternate who has been selected on the basis of seniority shall attend for the Representative in his/her absence. If seniority is equal among Alternates, then the CTA alphabet will be used to determine which senior Alternate will be contacted and notified to attend. Once the Representative returns to Council, the Alternate who attended for the absent Representative shall move back into the rotation process. (Amended October 1995, July 1999)

d. Only those Alternates who have been officially certified by the CTA Elections and Credentials Committee prior to the opening of the first session of State Council shall be seated and permitted to vote. (Adopted March 1972, Amended October 1995, July 1999)

SECTION 8. Voting Rights. Each voting member of the State Council of Education, as defined in Section 2 above, shall be entitled to one vote. Only members who are registered at the meeting of the Council shall be entitled to vote at that meeting. (Amended April 1968, April 1969, April 1970, October 1973, renumbered October 1979, January 1998)

SECTION 9. Quorum. The presence at any meeting of a majority of the voting members of the State Council of Education, as defined in Section 2 above, shall constitute a quorum for the transaction of business. (Amended April 1968, October 1973)

ARTICLE VI — BOARD OF DIRECTORS

SECTION 1. Composition and Number. The Board of Directors shall consist of: (Amended January 1998)

a. The President, ex officio;
b. The Vice President, ex officio; (Adopted May 1975)
c. The Secretary-Treasurer, ex officio; (Adopted January 1978; Amended October 1980)
d. Between 17 and 26 Directors, both numbers inclusive, selected from within directorial districts as defined in Section 3 below; (Amended May 1979 [to be effective July 1980]; January 1998)
e. Additional Directors who are members of racial and ethnic minorities as defined in Section 3.b. below; and (Amended January 1998, March 2000)
f. An elected NEA State Director from California as defined in Section 3.c. below. (Adopted May 1974; Amended May 1975, January 1978, May 1979, October 1980, January 1990, January 1998, March 2000)

SECTION 2. Qualifications. The following qualifications must be met to serve on the Board of Directors: (Amended January 1998)

a. Must be an Active member of the Association.
b. Must be an Active member of the National Education Association. (Amended January 1998)
c. Must be an Active member of a chapter of the Association where membership is available, provided that membership in no more than one chapter shall be required. (Added June 1988; Amended January 1998)
d. Must be employed in the district which s/he represents. (Added June 1992)

SECTION 3. Nomination and Election.

a. **Directors from Directorial Districts.**
   (1) **Election.** Directors from directorial districts shall be elected by the State Council of Education at its Annual Meeting, or, when a vacancy occurs between Annual Meetings, at the next regular meeting. (Amended January 1998)
   (2) **Establishment of Directorial Districts.** The boundaries of directorial districts shall be established by action of the State Council of Education. Such boundaries shall take into consideration the population and geographical distribution of Association membership and other criteria as the State Council of Education may from time to time adopt, and be in compliance with the one-person, one-vote standard: (Amended January 1998)
      (a) The total number of Active Association members shall be divided by the total number of geographical Directors to arrive at a base figure of members per geographical Director.
      (b) A similar computation shall be obtained for each directorial district. (Amended January 1998)
      (c) The figure for each directorial district shall be compared with the base figure to establish the percentage of deviation.
      (d) The average percentage of deviation per geographical Director shall not exceed ten percent. (Amended May 1979 to be effective July 1980)
   (3) **Nominating Caucus**. All voting Council members whose place of educational service is within the boundaries of each directorial district, shall be eligible to participate in the nomination of Directors. Each district shall consider all nominees in caucus preceding election by the Council at times and places to be established within regularly adopted election procedures. An alternate shall vote in the same directorial district as that of the representative for whom he/she is an alternate. Names of eligible

Association members may be proposed for caucus consideration by any Association member with the consent of the nominee. The caucus shall choose one or more nominees for presentation to the State Council of Education. Additional nominations of Active members of the Association employed within the boundaries of the directorial district may be made on the Council floor with the consent of the nominee prior to the election by the Council. Elections shall be by written ballot. (Amended May 1976, October 1978, October 1981, January 1998)

(4) **Deferral of Election**. By a two-thirds vote of declaration of emergency conditions at the time an election is pending, the State Council may defer an election of a Director from a given directorial district for a period of time up to one year. Such deferral may be vacated by a majority vote of the State Council at any time thereafter.

b. **Racial and Ethnic Minority Directors.** There shall be two at-large members of the Board of Directors in the category of racial and ethnic minority director as defined in Article V, Section 2.c. Additionally, there shall be at least the same proportion of members of the Board of Directors who are members of those racial and ethnic minorities as the proportion required for the State Council of Education. If for any reason this minimum proportion of Directors is not either elected to or currently serving on the Board of Directors, the State Council of Education shall hold a special election at its next regular meeting to elect at-large the additional number of Directors necessary to meet this requirement. (Amended January 1998)

c. **NEA Director Representation.** There shall be a representative from among the elected NEA State Directors from California. Whenever a vacancy occurs in the separate office of NEA Director serving on the CTA Board, a special election shall be held in which the State Council of Education shall choose one of the elected California NEA State Directors to be seated as a regular voting member of the Board of Directors. The term of office shall begin on June 26 following the election and shall run concurrently through June 25 for the remainder of his/her current elected term as NEA State Director, provided that such person is not prohibited from serving as set forth in Section 4.c. below. (Adopted May 1974; Amended May 1976, October 1978, March 1979, May 1979, January 1990, January 1998, March 2000, June 2004)

SECTION 4. Term of Office.

a. **Directors from Directorial Districts.**

(1) Each Director shall be elected for a three-year term, beginning on June 26th following the election. Those elected to fill unexpired terms shall take office upon election and serve the unexpired portion of the term. If an election is deferred, the expiration date of term shall be the same. (Amended October 1987, January 1998)

(2) Directors shall be eligible for reelection, but no person shall serve more than three full three-year terms. (Amended October 1978, May 1979, January 1998, November 2010)

b. **Racial and Ethnic Minority Directors-at Large.** These Directors shall be elected for a three-year term beginning on June 26 following the election. At-large Directors shall be eligible for reelection or for election as a Director from a directorial district. Those elected to fill unexpired terms shall take office upon election and serve the unexpired portion of term. (Adopted May 1974; Amended May 1975, November 1977, October 1978, May 1979, January 1998, March 2000, November 2010)

c. **All Directors.** Directors who have been elected to three three-year terms shall not be eligible for reelection to the Board. (Adopted March 2000, Amended November 2010)

SECTION 5. Vacancies. A vacancy as Director shall exist in case of the death, resignation, recall, or inability to serve. If any Director ceases to be a member of the Association or is absent from a meeting of the Board without proper excuse more than three times during any one term of office, a vacancy shall be declared. The Board shall determine whether a particular absence is excused. An appeal of any adverse Board action may be made to the State Council of Education. When a Director, who is elected from within a directorial district, ceases to be employed in active educational service within the boundaries of that directorial district, a vacancy shall be declared. Periods of sabbatical and other temporary leaves of absence or loss of employment due to holding elected office in the Association shall not be deemed to be a lapse of such employment. Any declaration of vacancy on the Board of Directors may be appealed to the State Council of Education. (Adopted May 1974; Amended May 1975, October 1978, January 1998)

ARTICLE VII — OFFICERS

SECTION 1. General. The officers of the Association shall be the Executive Officers and all Directors. The Executive Officers shall be President, Vice President, and Secretary-Treasurer. (Amended October 1980, January 1998)

SECTION 2. Qualifications. To be elected or continue to serve as an Executive Officer a person must be an Active member of the California Teachers Association, the National Education Association, and a chapter of the Association where such membership is available. (Adopted June 1988; Amended January 1998)

SECTION 3. Election and Term of Office. The election and the terms of Executive Officers shall be as follows: The President, Vice President, and Secretary-Treasurer shall be elected by the State Council of Education at the meeting preceding the Annual Meeting of the Council in odd-numbered years for a two-year term beginning on June 26. A person may be reelected to the same office for a subsequent two-year term after which at least one year must elapse before becoming eligible for reelection. (Amended January 1976, May 1977, March 1979, October 1980, October 1981, October 1987, January 1998)

SECTION 4. Subordinate Officers. The Board of Directors may appoint other officers as the business of the Association may require, each of whom shall hold office for a specified period, have authority, and perform duties as are provided in these Bylaws, in the Standing Rules, or as the Board of Directors may determine. (Amended January 1998)

SECTION 5. Resignation. An officer may resign at any time by giving written notice to the Board of Directors, the President, or the Secretary-Treasurer. Any resignation shall take effect at the date of the receipt of the notice or at any later time specified. (Amended June 1971, January 1998)

SECTION 6. Vacancies. A vacancy shall exist in case of the death, resignation, or inability to serve of the officer. In the case of a vacancy in the office of President, the Vice President shall become President for the remainder of the unexpired term, provided that the Vice President shall have been elected to the office of Vice President by the State Council of Education. In the event that the Vice President is an interim replacement appointed by the Board, s/he shall hold the office of President only until a special election of a new President can be held by the Council. In the event of a vacancy in the office of Vice President or Secretary-Treasurer, the Board of Directors shall appoint a temporary replacement to serve until the State Council of Education shall elect a permanent replacement to complete the unexpired portion of the term. Special elections shall take place at the next regular or special meeting of the Council which occurs not less than thirty days following the existence of the vacancy. (Amended June 1971, May 1977, January 1978, October 1980, March 1985, January 1998)

ARTICLE IX – AFFILIATES

SECTION 5. State Directors of NEA. State Council of Education members elected by direct vote of the membership shall elect the California State Directors for the National Education Association: *(Amended May 1979, January 1998)*

a. **Qualifications.** Any member of the Association who meets the following qualifications may be nominated for the office of State Director. *(Amended June 1971, June 1972, October 1973, May 1979, January 1998)*
   (1) Active or Life member of the National Education Association. *(Amended January 1998)*
   (2) A member in good standing of the chapter of the Association where chapter membership is available. *(Amended January 1998)*
   (3) Is employed in the area to be represented. *(Amended January 1998)*

b. **Vacancies.** If during his/her term of office any State Director dies, resigns, or becomes unable to serve his/her full term, or if he/she ceases to be employed in the area which he/she represents, his/her office shall be deemed vacant. His/her successor shall be selected to fill the remainder of the term as set forth in the Standing Rules of the Association. *(Amended November 1969, October 1973, January 1998)*

c. **Alternate Directors.** There shall be three alternate NEA Directors elected at large for terms of three years each, with one term expiring each year. Elections to fill vacancies shall be held during the Annual Meeting of the State Council of Education. Criteria for the election and eligibility for service shall be prescribed in Section 5.a.(1)(2). The positions shall be designated as first, second, and third alternate according to the cumulative length of continuous service as Alternate NEA Director, except that rankings shall be established by the drawing of lots in the case of Alternate NEA Directors who have an equal amount of such service. Vacancies occurring in the office of Alternate NEA Director need not be filled between Annual Meetings unless all three offices become vacant. Alternate NEA Directors shall serve in the absence of a regular Director from any NEA Board meeting. An Alternate shall also be recommended to the NEA Board of Directors or Executive Committee to serve as Interim Director to fill a permanent vacancy until an election for regular replacement is held and certified. *(Adopted October 1980, renumbered October 1980, Amended June 1987, January 1992, January 1998)*

ARTICLE X – CHAPTERS (LOCALS)

SECTION 4. Rights of Active Members in Chapters (Locals). Each chapter (local) shall guarantee its Active members an open nomination procedure and a secret ballot. No chapter (local) shall discriminate against its Active members in their right to vote, seek office, or otherwise participate in the affairs of the chapter (local), the Association, or the NEA. Chapters with members in multi-track, year-round schools shall develop specific provisions to ensure that all members are afforded the right to participate in chapter (local), Association, and NEA activities. (*Adopted January 1976, Amended January 1991, January 1998)*

Appendix U – Sections of CTA Standing Rules Pertaining to CTA Elections

RULE 3-1: State Council Registration and Attendance Procedures

1. **Certification of Election**. The current Official CTA State Council Representative/Alternate Tally Sheet must be completed and returned to the CTA Governance Support Department in order for the election to be certified by the Chairperson of the CTA Elections and Credentials Committee. The names of elected Representatives and/or Alternates shall be certified by the Chairperson of the Elections and Credentials Committee upon receipt of the CTA Official State Council Representative/Alternate Election Tally Sheet which states that the election has been held in compliance with rules established in the CTA Elections Manual. The results, on a CTA Official State Council Representative/Alternate Election Tally Sheet, shall be accepted from: (Amended June 1999)
   a. A chapter president or designee of a single chapter electoral district. (Amended September 1997)
   b. Service Center Council Chairperson or designee of a multiple chapter electoral district. (Amended September 1997)
   c. UniServ chairperson or designee when a multiple chapter electoral district is the same as the UniServ Unit. (Amended September 1997, June 1999)
   d. The president of an affiliated organization.
2. **Registration at State Council Meetings.** Representatives certified as prescribed above shall be permitted to register at State Council meetings not later than noon on the first Council day. Such registration shall include issuance of a State Council badge and materials at the CTA registration desk. Whenever possible, the Chairperson of the Elections and Credentials Committee shall be available to assist the CTA registration desk staff with certification of Representatives and Alternates whose names have not been previously submitted. When this is not possible, an Alternate or Representative with a special problem shall be directed to the Elections and Credentials Committee for assistance. (Amended September 1997, June 1999, July 2009)
   a. An Alternate certified under the above provisions must register by noon on the first Council day and sign a statement that he/she is serving for a designated Representative. Once the Alternate has registered, that seat is filled for the duration of that State Council meeting. An Alternate badge shall be issued which will include the name of the Alternate and the absent Representative. (Amended June 1999)
   b. When an electoral district has not completed its election of Representative or Alternate by the time of a State Council meeting, representation for the electoral district may be achieved by the following: (Amended June 1999)
      (1) For a single chapter electoral district, the chapter president shall write a letter requesting seating of a member for the one meeting only. (Amended September 1997)
      (2) For a multiple chapter electoral district, the presidents of the chapters (which must represent a majority of the members of the district) shall write a letter requesting seating of a member for the one meeting only. (Amended September 1997)
      (3) For a Service Center Council at-large district, the Service Center Council Chairperson or designee (which must represent a majority of the members of the district) shall contact the presidents of the chapters who shall write a letter to the CTA President requesting seating of an ethnic minority member for the one meeting only. Adopted June 1999)
      (4) The member must appear before the Committee on Elections and Credentials before the opening of the first session of Council. (Adopted June 1992)
      (5) After conducting such research as may be appropriate, the Elections and Credentials Committee shall make a recommendation to the full State Council regarding seating. (Amended June 1992, June 1999)
      (6) The decision of the State Council is final. (Amended June 1999)

RULE 8-8: Elections and Credentials Committee

1. **Composition.** The Elections and Credentials Committee shall consist of eleven (11) members. All members shall be chosen either from among those who have served at least three years on the State Council of Education but who are not in such positions at the time of appointment or during the time of service on the Committee. (Amended December 1978, September 1979, September 1987, June 2005, June 2009)
2. **Charge to Committee.** The functions of the Committee shall be as follows:
   a. To develop and recommend to the Board of Directors for adoption the material to be contained in the Elections Manual as prescribed elsewhere in these Standing Rules.
   b. To count and certify the votes on elections and/or issues decided by the State Council and such additional matters as may be prescribed by the Board of Directors.
   c. To hold such hearings in connection with its duties as may be prescribed by the Board of Directors.

d. To be responsible for the supervision of the accreditation of members and alternates at the meetings of the State Council of Education, including giving assistance in settling any dispute over the seating of a delegate within the following procedures:
   (1) An opportunity shall be given for interested parties to present their positions to the Committee, after which the Committee shall consider the evidence and submit its recommendations to the Board of Directors for action.
   (2) The decision of the State Council of Education shall be final.
e. To verify the documentation of members elected to fill unexpired terms.
f. To verify the documentation of alternates.

3. **Quorum.** The presence at any meeting of five members shall constitute a quorum for the transaction of business. A lesser number of members than that required for a quorum may discuss and take action on any item of business subject to the ratification by a quorum at a subsequent meeting. The Committee shall regularly be available for meetings concurrent with meetings of the State Council of Education, and additionally as deemed necessary upon call of the chairperson in accordance with procedures adopted by the Board of Directors.
4. **Prohibition.** As a condition of being retained on the Committee:
   a. Members shall refrain from being involved in actively promoting any campaign for elected office, or issue, in the Association, whether such activity is identified as promotion or opposition to such candidate, or issue. This prohibition shall apply whenever the Committee has, or has the potential of being assigned, jurisdiction over an election or its appeals process in any way. This shall not operate to preclude activities within the chapter to which a member of the Elections and Credentials Committee belongs, except that when an issue arising from such a chapter becomes the property or is placed under the jurisdiction of the Committee, the member of the Committee belonging to that chapter shall not discuss or vote on the issue as a committee member. (Adopted November 1978; Amended July 1979, June 2009)
   b. Members shall abstain from participating in the Committee activities related to balloting during the specific meeting(s) in which his/her immediate family member is a candidate. (Amended February 1990; Renumbered June 1994, Renumbered June 2009)

RULE 9-1: CTA/ABC Committee

4. **CTA/ABC Committee Members.**
   a. **Powers, Duties and Functions.** The general management of the business and affairs of the CTA/ABC Committee shall be under the control, supervision and direction of the CTA/ABC Committee members within the requirements of law, the CTA Bylaws, policies adopted by the CTA State Council of Education, and guidelines established within such policies by the CTA Board of Directors.
   b. **Composition.** The CTA/ABC Committee shall reflect the number of geographical districts of the CTA Board of Directors as determined in Rule 2-1.1. Additionally, the same racial/ethnic minority guarantees shall exist for the Committee as are prescribed for the CTA Board of Directors. (Amended January 1999, November 2013)
   c. **Election of Members.** Election of the CTA/ABC Committee members shall take place in the same manner as that prescribed for CTA Directors.
   d. **Eligibility for Service.** Any member of CTA shall be eligible for service as CTA/ABC Committee member.
   e. **Term of Service.** Term of service and limitations upon the number of terms of service as CTA/ABC Committee member shall be the same as prescribed for CTA Director. Each term shall expire June 25 of the year ending the term. (Amended January 1990)
   f. **Vacancies.** Vacancies in the office of CTA/ABC Committee member shall be deemed to exist in the event of excessive absence, inability to serve, resignation or failure to adhere to the policies of the CTA State Council of Education as implemented by guidelines adopted by the CTA Board of Directors. Declaration of vacancy shall be by action of the CTA Board of Directors, taking into account any extenuating circumstances which may be set forth by action of the Committee. An appeal may be taken from the declaration of vacancy to the CTA State Council. Vacancies shall be filled at the next meeting of the CTA State Council of Education in the same manner as if a regular election were being held except that, in the case of a vacancy created by inability to serve or resignation, the President may designate, subject to Board of Directors approval, an interim CTA/ABC Committee member to serve until an election is held, the selection of an interim Committee member to be made from a list of nominees submitted by the CTA Board of Directors member(s) for that directorial district following consultation with the Service Center Chair(s) in that directorial district.
   g. **Meetings.** The Committee shall meet at least quarterly, or as needed.
5. **Committee Leadership**. The CTA Executive Officers shall be charged with working on a daily basis with the CTA/ABC Committee and its leadership for the proper performance and safeguarding of the funds of

CTA/ABC. Additional specific duties of designated CTA/ABC Committee leaders shall be as contained in this paragraph. (Amended February 1989)

a. **Committee Chairperson.** The CTA/ABC Committee Chairperson shall be elected by and from the current members from each geographical district and At-Large members of CTA/ABC Committee, using procedures contained within the CTA Elections Manual. The Chairperson shall serve a period of one year beginning on June 26, or until the end of the period of service as a member of the Committee. The Chairperson shall preside over meetings of the CTA/ABC Committee and shall serve as the official spokesperson for the Committee within the internal structure of CTA. In the event of a vacancy during a term in the office of CTA/ABC Committee Chairperson, the CTA/ABC Committee Vice Chairperson shall become the CTA/ABC Committee Chairperson. (Amended June 1999, June 2005)

b. **CTA/ABC Committee Vice Chairperson.** The CTA/ABC Committee Vice Chairperson shall be elected by and from the current members from each geographical district and At-Large members of the CTA/ABC Committee at the same time and in the same manner as prescribed for CTA/ABC Committee Chairperson. In the event of a vacancy, the election shall be held at a CTA/ABC Committee meeting as soon as feasible. The CTA/ABC Committee Vice Chairperson shall serve for a period of one year beginning June 26 or until the end of the period of service as CTA/ABC Committee member. The CTA/ABC Committee Vice Chairperson shall serve as an assistant to the Chairperson. (Amended June 1999, June 2005)

c. **Recording Secretary.** The CTA/ABC Committee Recording Secretary shall be elected by and from the current members from each geographical district and At-Large members of the CTA/ABC Committee at the same time and in the same manner as prescribed for CTA/ABC Committee Chairperson and Vice Chairperson. The CTA/ABC Committee Recording Secretary shall serve for a period of one year beginning June 26 or until the end of the period of service as CTA/ABC Committee member. The CTA/ABC Committee Recording Secretary shall: (Amended June 1999, June 2005)
   (1) Keep an accurate record of all action items taken during the ABC meeting.
   (2) Review the monitoring report and the financial reports to ensure categories and accounts are accurate and adaptable to the needs of the committee.
   (3) Review policy and working materials essential to the ABC to ensure they are accurate. (Amended January 1999)
   (4) Review special reports as deemed necessary and requested by the ABC, e.g. the minority participation report and the report and materials from the long day meeting.
   (5) Participate with the other Officers of ABC in the development of the ABC internal working annual budget.

d. **CTA/ABC Committee Treasurer.** The CTA Treasurer shall function ex officio as Treasurer for the CTA/ABC Committee for purposes of fund control responsibility, rendering such internal and external reports as may be required by the CTA governance structure and/or by the CTA/ABC Committee members.

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CALIFORNIA TEACHERS ASSOCIATION

ELECTIONS AND CREDENTIALS COMMITTEE

REQUIREMENTS FOR CHAPTER ELECTION PROCEDURES

2014 - 2015

PREFACE

It is the purpose of these requirements to ensure the integrity of the electoral process. The principle of voting is to determine the mandate or choice as expressed by those voting. This requires that election procedures, both for candidates and for policy issues, must afford every member the opportunity to vote.

[Revised 6/13]

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CALIFORNIA TEACHERS ASSOCIATION
ELECTION PROCEDURES

These election procedures are provided to assist a unit in conducting elections in an orderly manner and in accordance with CTA guidelines. A "unit" is defined as a Chapter, Service Center Council, UniServ Unit, ESP Unit or an entity that must conduct an election.

Chapter presidents must provide all Active members (hereinafter referred to as "members") an opportunity to vote. Chapter presidents do not have the option of deciding that such elections shall not be held. *[Revised 6/13]*

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. It will be composed of at least three members who are familiar with the unit operations and who are not seeking election. Voting members of the unit's governing body (i.e.: Executive Board) are not permitted to be on the unit's elections committee. 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. *[Revised 6/12, 6/13]*

The Elections Committee is charged with ensuring that elections are conducted in a fair and impartial manner, consistent with the following:

I. Election Timeline and Procedural Components

1. The timeline, procedural components, voting by mail procedure and the challenge procedure must be established prior to the election. If the unit has year-round schools, more time is needed because mail balloting may be required.
2. Schools/work sites on alternative calendars shall be considered when setting election timelines. *[Revised 6/13]*
3. The election begins with the announcement of vacancy(ies) and terms of office and cannot be stopped until the conclusion of the election, including run-offs if necessary.
4. A Timeline for Elections shall include the following:
   a. 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;
   b. At least fifteen (15) calendar days between the announcement date of the vacancy(ies) and the date of the election;
   c. Place, time and date of receipt (date received, not date postmarked) for declaration of candidacy forms;
   d. Final date to acknowledge candidates' declaration of candidacy;
   e. Date for preparation of ballots;
   f. Date on which ballots will be distributed;
   g. Date by which to request a ballot;
   h. Date(s) when voting will take place;
   i. Deadline date (date received, not date postmarked), time and place for return of ballots;
   j. Date, time and place where ballots will be counted, which should be immediately following the deadline for receipt of voted ballots;
   k. Date that announcement of results shall be made to leadership, candidates, members, and posted at each work site, which date shall be not later than five (5) calendar days following the counting of ballots;
   l. Dates and timelines for run-off election, if necessary; and
   m. Deadline for filing of challenges to initial election and run-off if held (date received, not date postmarked). *(See Appendix A)* *[Revised 6/04, 6/06, 06/07, 06/08]*

5. Procedural Components should include the following:
   a. Method by which Declaration of Candidacy(ies) are submitted (mail, hand delivered, fax);
   b. Procedure for distributing election guidelines/rules to candidates;
   c. Campaign statement of candidates (decide on limit of number of words, and what to do if limitation is exceeded);
   d. Method of distribution of ballots;
   e. Whether declarations of candidacy must be accompanied by a campaign statement, or whether the statement will be solicited later. If later, a deadline date must be established;
   f. Provision for elections committee chairperson or designee to be present to receive declaration of candidacy by filing deadline;
   g. Announce that the names are to be listed according to CTA alphabet; *[Revised 6/05]*
   h. If not provided in governance documents, election will be decided by majority vote. If a candidate does not receive a majority vote, a run-off election shall be conducted between 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.

[Revised 7/03, 6/13]

II. Open Nomination

Open nomination is defined as the opportunity of any unit member to nominate any other unit member, including himself/herself. The only qualification for office is membership in the unit. Declaration of candidacy forms shall be readily available to members. The form must state the requirements as to the deadline for time and place of filing.

III. Term

The term(s) of office shall be clearly stated on the following documents:

1. Announcement;
2. Declaration of Candidacy form; and
3. Ballot.

IV. Campaign Finances and Use of Unit Resources

1. Monies received by a unit by ways of dues, assessment or similar levy must not be used to promote any candidate.
2. A unit may not state or indicate its preference for a candidate in the unit's publications.
3. The use of links to any Association website by a candidate is prohibited.
4. The Association shall not make available personal emails to candidates.
5. District email addresses and/or electronic systems shall not be used for campaigning. Use of district school mailboxes for campaigning must follow district policy. *[Revised 6/14]*
6. Candidates cannot campaign on any affiliated chapter/service center social networking sites created for association/leadership members to communicate with each other. *[Revised 6/10]*
7. Each candidate shall have the right to a list of the work site names and work site addresses with the number of Active members at each site for the purposes of campaigning.

   [Revised 7/03, 6/04, 6/05, 6/07]
8. A unit will honor all reasonable requests by a candidate to distribute campaign literature at his/her expense to all members in good standing, whether the distribution is by mail or other means. However, if distribution of campaign literature for one candidate is without charge, then distribution for all candidates must be without charge. Treating all candidates the same by refusing to honor any and all reasonable requests for distribution of campaign literature at the candidate's expenses is not permitted. The unit should inform all candidates of rules in this regard.
9. A candidate cannot accept direct contributions from a unit's treasury or indirect contributions in the form of use of a unit's assets, facilities, staff, equipment, mailings, good will or credit.
10. A candidate cannot use the official logo of the unit or official Association title in a way that suggests that the candidate has the support of the unit, CTA or any of its affiliates. This prohibition includes candidate email addresses. *[Revised 6/10]*

11. All campaign flyers/materials must include the following disclaimer, which must be stated verbatim: "The views and opinions expressed are those of the candidate and not necessarily those of the unit, CTA, NEA or any of its affiliates." *[Revised 6/04, 6/13]*

V. Candidates' Statements

Each candidate must be treated equally in preparation and distribution of a campaign statement. When there is a limitation of words, each word shall be counted. Any word(s) exceeding the limitation shall not be printed. ***The statements shall not be printed on the ballot.***

VI. Ballot

The CTA alphabet should be used to determine the order of the candidate's names. 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.

The ballot shall state the name of the office, the term, and the name for each office/position of the candidate(s) who have filed declarations of candidacy within the timeline. The ballot shall include space for a write-in candidate for each office/position, except in a run-off election.

[Revised 6/04, 6/07]

VII. Voting Methods

All Active members must have an opportunity to vote. Active members who are off-track or on a dues paying leave shall be notified by mail in order to provide them an opportunity and right to vote. Active members on Association/Affiliate business may request a ballot by mail. Provisions must be made for members to cast a ballot in such a manner that the person casting the vote cannot be identified with the vote cast. Voting by mail may be used at sites where it is difficult to contact each member individually to secure a signature on the official voter roster/sign-in sheet. 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. Members shall be notified of the types of voting options utilized by the chapter. *[Revised 6/04, 6/07, 6/13]*

1. **On Site Voting.**
   a. Each voter must sign or initial a voter roster/sign-in sheet before receiving a ballot.
      1) Voter Roster – List of eligible voters.
      2) Voter Sign-in Sheet – List of eligible voters which includes a place for a signature.
   b. The marked ballot must be returned to a designated site representative or ballot box.
   c. Campaign materials are not allowed in or near the polling area nor should campaign materials be distributed with ballots. *[Revised 6/04]*
   d. Preliminary counts shall not be completed at school/work sites.
   e. Site representatives must return all voter roster/sign-in sheets and ballots to the Elections Committee by the designated date and time. Ballots must be secured and uncounted. Roster/sign-in sheets and ballots from each site must be kept together until verified by Elections Committee.
   f. *Refer to Section IX for the Counting of Ballots procedures*.
   g. After verification of signatures, all ballots shall be placed in one stack for counting.

   [Revised and renumbered 6/12]

2. **Vote by Envelope at School/Work Site/Specified Site**
   The following procedure may be used to conduct an election at sites where it is difficult to contact each member individually to secure a signature on the official voter sign-in sheet upon issuance of the ballot. The additional cost of using inner and outer envelopes shall be borne by the unit.
   a. A list of current members shall be prepared, which includes each member's name and work address.
   b. The voter shall be provided with:
      1. A ballot;

2. Instructions on:
    a) Folding and placing of the ballot in the unsigned inner envelope;
    b) Placing of the unsigned inner envelope into the outer envelope;
    c) Signature and school/work site on the outer envelope addressed to the chapter; and
    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. *[Revised 6/10]*

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.
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, and placed in one stack for counting. *[Revised 6/12]*
g. Refer to Section IX for the Counting of Ballots procedures.

3. Voting by Mail

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:

a. A list of current official members shall be prepared, which includes the following: name, work and home address.
b. 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.
c. The voter shall be provided with:
    1. A ballot;
    2. Instructions on:
        a) Folding and placing of the ballot in the unsigned inner envelope;
        b) Placing of the unsigned inner envelope into the outer envelope;
        c) Signature and school/work site on the outer envelope addressed to the chapter; and
        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;
    4. A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
d. At the time of counting, the names on the outer envelope shall be checked against the official list of voters.
e. The name on the official list should be marked to show that the voter has returned a ballot.
f. The outer envelopes shall then be opened and put in a separate stack for safekeeping.
g. All inner envelopes shall be placed in a separate container.
h. All inner envelopes shall be opened and the ballots removed from the envelopes, and placed in one stack for counting. *[Revised 6/12]*
i. Refer to Section IX for the Counting of Ballots procedures.

[Revised 6/04, 6/10]

4. Electronic Online Voting

a. Chapters and/or a Service Center Council (SCC) wishing to use electronic/online voting shall confer with the CTA Elections and Credentials Committee Chair or designee prior to initiating any electronic/online voting. The CTA Elections Chair or designee shall provide the Chapter and/or SCC with the contact information for CTA approved vendors and related concerns as reflected in this section. *[Revised 1/13, 6/13]*
b. **The electronic/online voting vendor does not replace the Chapter/SCC's elections committee.** The Chapter and/or SCC shall appoint a standing elections committee in accordance with these *Requirements for Chapter Election Procedures*. *[Revised 6/13]*
    1. The committee shall be appointed and recorded in the Chapter and/or SCC minutes.

2. The members of the committee shall not be current voting members of the governance body; shall not be a candidate, or a member of a candidate's immediate family.
3. The list of the committee members shall be sent to the CTA Elections and Credentials Committee immediately following appointment.

c. Elections training shall be scheduled with and conducted by the CTA Elections and Credentials Committee for, at a minimum, the local chapter president and elections committee chair or the SCC Chair and SCC elections committee chair prior to conducting elections utilizing electronic voting. *[Revised 6/14]*

d. Any Chapter or CTA Service Center Council (SCC) that elects to conduct electronic/online voting shall be required to meet the following additional minimum standards in the election procedures: *[Revised 6/13]*

1. Electronic/online voting shall not create a situation where an eligible member is denied a means to vote in the election. The Chapter and/or SCC shall ensure that there is an alternative ballot procedure for use by those members who (a) cannot access and use an electronic/online environment; (b) who do not have the equipment necessary for electronic/online activities; (c) do not wish to vote electronically/online. The alternative ballot procedure shall comply with one of the methods as identified in this Section IV-9, Voting Procedures for State Council Representatives and Alternates.
2. Any Chapter and/or SCC that has made the decision to conduct an electronic/online election in accordance with these requirements shall conduct elections using only a CTA approved company in order to protect the Chapter's/SCC's membership information. Any costs associated with the work done by a CTA approved company shall be borne by the Chapter/SCC. *[Revised 6/12, 6/13]*
3. The Chapter/SCC shall notify the Elections and Credentials Committee of the name of their chosen vendor.
4. Should the CTA Elections Committee discover during the course of certifying a State Council representative and/or alternate election that a chapter/SCC did not use a CTA approved electronic voting vendor to conduct the election, the election shall be immediately declared null and void and the chapter/SCC will be required to re-run the election using a paper ballot. *[Revised 1/14]*
5. Any challenge filed in an electronic/online voting election which does not reflect the use of one of the CTA approved vendors by any chapter and/or SCC shall have the election immediately declared null and void and the election will have to be re-run on a paper ballot.
6. CTA strongly discourages the use of a school district's Internet system, lines, and equipment for electronic/online voting. *[Revised 6/14]*
7. Chapters and/or SCCs shall adhere to all elections requirements as defined in the *CTA Elections Manual* and *Requirements for Chapter Election Procedures*.
8. Chapter and/or SCC election instructions for both electronic/online and paper ballot shall be distributed to the chapter voting members using both electronic/online and paper communication as established by the Unit's governance documents.
9. All records involved with any electronic/online vote conducted by the Chapter/SCC shall be maintained in a hard copy as well as electronically, and should be retained by the local for one year after the election, in order that any challenge filed to an election which is conducted in an electronic/online environment can be properly processed in accordance with CTA Elections Challenge Procedures.

[Revised 6/12, 6/13]

VIII. 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. Majority 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 any candidate or issue. When there is a tie in a plurality election and it is not feasible to conduct the election again because of the time factor, the following procedure shall be followed:

a. When there is a tie, the ballots shall be recounted.
b. If the result is still a tie, the elections committee chairperson shall:
   1) Call the candidates (according to the CTA alphabet) and inform them of the tie and that a coin toss shall be used to determine the winner.
   2) If the first candidate called wishes to remain in the race, the chairperson shall ask that candidate to choose "heads" or "tails" in the coin toss.
   3) The elections committee chairperson shall designate the time and place for the coin toss and inform the candidates, who may have an observer present. The observer may be the candidate.
   4) The elections committee shall note the coin toss on the Unit's Official Teller's Report.
   5) The elections committee shall follow the established procedure in notifying the candidates of the results.

3. A two-thirds (2/3) vote means at least two-thirds (2/3) of the legal votes cast.
4. For unit officers, and at-large members of the Executive Board, the election will be by majority vote. *[Revised 6/14]*
5. An election for school site representatives 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. *[Revised 6/14]*
6. For State Council*: (See the Election Timelines, Procedures, and Guidelines in Sections IV-9.2 and IV-9.3 of the CTA Elections Manual)*
   a. If a unit is a single electoral district or a multiple unit electoral district, the election for State Council Representative will be by majority vote.
   b. If the unit is within a multiple unit electoral district, the Service Center Council (SCC) elections committee will determine if a candidate has received a majority vote. For multiple electoral districts, the chapter elections committee returns a signature and ballot verification sheet *(see Appendix M)*, voted ballots, and voter roster/sign-in sheets to the SCC elections committee by deadline date. *[Revised 6/11, 6/12]*
7. If a candidate does not receive 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.** A majority vote is required to win a run-off election. *[Revised 6/13]*
8. For NEA Local Delegates, the election will be by plurality vote. Results must be sent to the CTA Governance Department and to the Service Center Council. *[Revised 6/13]*
9. 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.
10. For NEA State Delegates, the election will be by plurality vote. Successor delegates (alternates) are ranked in the order of votes received. Voted ballots, signature sheets/rosters, and a signature and ballot verification sheet (see Appendix M) must be submitted to the Service Center Council, which will tally all the ballots and report the results to CTA. *[Revised 6/12]*
11. For additional CTA/NEA election guidelines refer to the official *CTA Elections Manual*.

[Revised and renumbered 7/03, 6/14]

IX. Counting of Ballots

1. Each candidate may designate one observer, who may be the candidate, to observe the vote counting process. The observer shall not interfere with the work of the Elections Committee and must remain in the room where the vote count is taking place. Electronic devices of any kind (cell phone, computer, tablet, etc.) are not allowed in the counting area. *[Revised 6/04, 6/05, 6/13]*
2. The Elections Committee shall verify signature sheets with ballots received, which should be completed immediately following the deadline for receipt of voted ballots. *[Revised 6/04, 6/09]*
3. Ballots set aside and not counted are:

a. More ballots than signatures;
b. Ballot(s) submitted after deadline;
c. Voting envelopes without a signature; and
d. Ballots that are separated from voter roster/sign-in sheet. *[Revised 6/13]*

4. After verification of signatures, ballots shall no longer be separated by site. *[Revised 6/11]*
5. Each office/position on the ballot shall be treated as a separate race. Therefore it is possible that blank or illegal ballots for one race may still be counted in remaining positions on the ballot. *[Revised 6/10]*
6. Blank and/or illegal ballots for each office/position shall be set aside. Examples include the following:
   a. Member not verified;
   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. *[Revised 6/10]*
7. The Elections Committee should categorize each illegal ballot, make a determination on whether the vote(s) in that category should be counted separately, as listed in 6(a-e) above, and make a note of the decision. The ballots should remain separate.
8. 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.
9. 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. Specific to County office of Education chapters only – election results shall be posted electronically as soon as possible following the election. *[Revised 6/10, 6/11]*
10. The ballots and voter sign-in sheets should be retained by the unit for one year after the election.

X. Challenge Procedure

1. A challenge cannot be initiated until after the results, including any run-offs if necessary, of the election have been posted at each work site. *[Revised 6/13]*
2. Challenges for election of State Council Representatives, Alternates, State, and Local delegates to the NEA RA follow procedures in the *CTA Elections Manual*.
3. Challenging party(ies) must notify the unit president and elections chair of a challenge in writing, using the official Original Election Challenge Form *(See Appendix N),* 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 5. *[Revised 7/03, 6/08, 6/09, 6/13]*
4. Upon receipt of the challenge, the unit's Elections Committee will notify all the candidates that a challenge has been filed and the nature of the challenge. 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 identified by the challenger.
   g. Inquire and gather the names and contact information of other 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 identified 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 manner.
k. Submit a written report including issues, findings, and recommendations to the chapter president and the Executive Board within the same ten (10) calendar day period.

[Revised and renumbered 6/12]

5. Any member of the Executive Board who was a candidate in the race that has been challenged, was named in the challenge, signed an individual witness documentation form, or whose immediate family member is a candidate in the race that has been challenged, shall recuse themselves from discussion of and voting on the challenge. *[Revised 6/14]*
6. If in the case where the majority of the Executive Board is unable to act on the challenge the decision shall move to the Representative Council. In the absence of a Representative Council, the unit shall contact the CTA Elections and Credentials Chairperson through the Governance Support Department to determine the next step. *[Adopted 6/05, Revised 6/11, 6/12]*
7. The governance body shall render a decision and issue that decision in writing to the challenging party and all candidates on the ballot 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 on the next page. The names of challengers and challenge forms shall remain confidential.

[Revised 6/05, 6/06, 6/08, 6/13]

8. If the governance body fails to act within twenty (20) calendar days of the original challenge, the challenging party may file an appeal on the official CTA Appeal Form to the CTA President.
9. The challenging party or any candidate affected by the decision of the unit's governance body may file an appeal on the official CTA Appeal Form to the CTA President within ten (10) calendar days from the date of the decision of the unit's governance body. The appeal shall include the information requested on the official CTA Appeal Form located in Appendix O. *[Revised 7/12, 6/13]*
10. In the circumstance where an election has been conducted to elect one or more officers, and the elections results are challenged, the winner(s) of the election shall hold office until such time as the challenge is resolved. *[Revised 6/04]*
11. The challenge procedure for election of State Council Representatives and Alternates, and State or Local Delegates to the NEA Representative Assembly is outlined in the *CTA Elections Manual*.

[Revised 07/02]
[Revised 6/10, 6/11, 6/13]

CTA Challenge Procedures – Local/Service Center Council Elections

"Challenges for election of State Council Representatives and Alternates
State and Local delegates to NEA RA follow procedures in the CTA Elections Manual."

Local/Service Center Council Level
Challenge filed at local unit level following local unit procedures provided in local governance documents within ten (10) calendar days after the announcement of the results of the election.

Local Election Committee
The local election committee has ten (10) calendar days upon receipt of the challenge to investigate and report their recommendations to the unit's governance body based on the results of the investigation.

Local Governance Body
The local governance body has ten (10) calendar days to render a decision and to issue that decision in writing to the challenging parties, all candidates on the ballot, and the elections committee chair.

CTA Level
If the governance body fails to act within the ten (10) calendar days, the challenging party(ies) may file an appeal on the official CTA Appeal Form to the CTA President who shall refer the challenge to the Chairperson of CTA Elections and Credentials Committee.

The challenging party or any candidate affected by the written decision of the unit's governance body may file an appeal on the official CTA Appeal Form within ten (10) calendar days from the date of the decision of the unit's governance body to the CTA President who shall refer the challenge to the Chairperson of CTA Elections and Credentials Committee. Such appeal shall include the information requested on the official CTA Appeal Form.

The challenge appeal and all required documentation shall be received by the CTA President no later than 5:00 P.M. on or before the tenth (10th) day.

CTA Elections Committee Level
The CTA Elections and Credentials Committee investigates the challenge and determines actions to be recommended to the President**.** At the direction of the CTA President, the CTA Elections and Credentials Committee initiates appropriate action and submits a report of findings and recommendations to the CTA President and the CTA Board.

CTA Board of Directors Level
CTA Board shall send approved recommendations to the Local President/ Service Center Council Chairperson, to the appealing party(ies), and to members who provided information to the CTA Elections and Credentials Committee. The CTA Elections and Credentials Committee report to the Board and documents obtained in regards to the challenge are confidential.

Monitoring
CTA Elections and Credentials Committee will provide follow-up contact with the local chapter as necessary concerning progress of recommendations.

CTA Geographic Director Level
If a chapter does not respond to the recommendations in a timely manner, the Board Liaison of the CTA Elections and Credentials Committee will contact the Geographic Director.

Follow-Up Contacts
When the CTA Elections and Credentials Committee makes follow-up contact with the local unit, notification will be made to the CTA President and the Geographic Director.

CTA President and CTA Board of Directors
Whenever the CTA Elections and Credentials Committee has been unsuccessful in working with the chapter to implement recommendations, the CTA President and Board of Directors will be notified for action.

[Revised 6/04, 6/06, 6/08, 6/10, 7/12, 6/13]

XI. Initiative Procedures

1. The active membership shall have the authority to make decisions on any matters affecting the Association or its activities through the initiative process.
2. A 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.
3. 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.
4. 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.
5. The circulators shall present to the chapter president the petition(s) containing original signatures.
6. The chapter president shall have thirty (30) calendar days in which to verify the membership of the signers of the petition.
7. If there are insufficient signatures, the petition circulator will be notified within three (3) calendar days, that the petition failed for a lack of signatures.
8. 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.
9. Regular election procedures (e.g., election of officers) shall be followed including voting times.
10. The proposal shall take effect immediately upon receipt of the required number of votes, unless otherwise specified.

[Revised 6/13]

XII. Referendum Procedures

1. Any action or proposed action of the Representative Council or the Executive Board shall be referred to a vote of the membership upon two-thirds (2/3) vote of that body at any valid meeting.
2. The referendum action shall prescribe the exact wording of the question to be posed to the 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 referring body, provided that the period that school is officially not in session shall not be included in this count.

[Revised 6/12]

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.

[Revised 6/10, 6/13]

XIII. Recall Procedure

1. The Active membership shall have the authority to recall from office any person(s) having been elected thereto by the Active members. *[Revised 6/13]*
2. Any Active member(s) desiring to recall a unit officer must file a copy of a petition with the chairperson of the Elections Committee before it can be circulated. *[Revised 6/05]*
3. 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 petition;
   d. Name(s) of person(s) filing petition and personal email address(es); *[Revised 6/13]*
   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.

4. The petition must be filed with and approved by the Chairperson of the Elections Committee. Signature gathering may not begin until the petitioner(s) receive notice from the Chairperson of the Elections Committee. *[Revised 6/13]*
5. 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 Elections Committee shall so notify the petitioner(s). (See number two (2) above.)
   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.
6. Monies from a unit's treasury or indirect contributions in 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.
7. No unit may state or indicate its preference in the unit's newspaper, newsletter or communications to its members.
8. 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. *[Revised 6/05, 6/10]*
9. The signed petitions must be received by the Chairperson of the Elections Committee by the specified deadline date.
10. The Elections Committee shall have ten (10) calendar days after receipt of the petition to verify signatures.
11. 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 signatures, that the petition failed for a lack of signatures. *[Revised 6/05, 6/10]*
12. Immediately upon verification of the signatures, the Chairperson of the Elections Committee shall:
    a. Notify the president/designee of the fact that a recall has been initiated.
    b. Prepare an election announcement, timeline (in accordance with the requirements for chapter elections), and declaration of candidacy form for replacement officers if recall passes.
    c. The declaration period must be no less than ten (10) calendar days and no more than fifteen (15) calendar days after verification of signatures. The period that school is officially not in session shall not be included in this count.

    [Revised 6/12, 6/13]
13. When preparing the ballot, please reference Appendix K(a) for a sample. *[Revised 6/13]*
14. The election must be concluded within fifteen (15) calendar days of distribution of the ballots.
15. The election must be conducted with provisions for a secret ballot and voter sign-in sheets, double envelope system or electronic voting. *[Revised 6/13]*
16. The election shall be certified in accordance to the unit's bylaws.
17. 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.

XIV. Staff Involvement

Elections and elections procedures are the responsibility of the Association membership, in particular the elections committees. Association staff provides support and assistance to the local and Service Center Council membership and elections committee in meeting these responsibilities. Associate staff assistance shall be in the areas of maintaining a reference copy of the election calendar established by the elections committee, preparing drafts of the various elections documents, and based on the decisions of the elections committee, preparing those documents selected for use by the elections committee for distribution. Professional staff responsibility shall be commensurate with their consultant role to either the local chapter or the service center council. Neither Associate staff nor Professional staff shall take on responsibility for the decision-making or physical handling of the actual elections procedures and processes. *[Revised 7/03]*

Appendix A- Sample Timeline for Elections

The Elections Committee should decide on a timeline that best fits the unit, number of members and school district calendar. Units with year-round schools may have to lengthen the timeline to allow for mail balloting.

The following is a sample only and should be adjusted to fit the unit's needs.

April 3	-	Announcement of vacancies to members via publications.
April 25	-	Declarations of candidacy must be received in the CTA/XYZ unit office, 123 Main Street, Anytown, no later than 5:00 p.m. on April 25.
April 28	-	Acknowledgment of declarations of candidacy.
May 1-5	-	Preparation of campaign statements, ballots and voter registration roster/sign-in sheets.
May 8-12	-	Distribution of voting materials to work sites and to off track teachers.
May 15-18	-	Voting at individual work sites.
May 19	-	Ballots AND voter roster/sign-in sheets must be received in the unit office by 5:00 p.m. on May 19. (Postmarked date not accepted.)
May 19	-	Ballots will be counted at the unit office on May 19, starting at 5:15 p.m.
May 20	-	Announcement of results to leadership, candidates, members, and posted at each work site, which date shall be not later than five (5) calendar days following the counting of ballots. If a run-off election is necessary, this will be included in the announcement.
May 22-25	-	Preparation of run-off ballots, if necessary.
May 26-31	-	Distribution of run-off ballots, if necessary.
May 30	-	A challenge to the election must be received in the unit office no later than 5:00 p.m. unless there is a run-off election.
June 1-5	-	Voting for run-off election at individual work sites
June 6	-	Ballots AND voter roster/sign-in sheets must be received in the unit office by 5:00 p.m. June 6
June 6	-	Ballots will be counted at the unit office on June 6, starting at 5:15 p.m.
June 7	-	Announcement of run-off results to leadership, candidates and members
June 17	-	A challenge to the election, including the run-off election, must be received in the unit office no later than 5:00 p.m. (Postmarked date not accepted.)

Appendix B - Sample Announcement

A unit may choose to notify its members of upcoming vacancies through an announcement in its newspaper, newsletter or notice to its members.

The announcement should include the name of the office(s), the qualifications for each office, the starting and ending date of the term, and the deadline date, time and place where the declaration of candidacy should be filed.

Sample Announcement

ANNOUNCEMENT OF ELECTION

The CTA/XYZ Unit will be holding its election for the offices of Unit President, Unit Vice President, Unit Secretary and Unit Treasurer during the second week of May. Nominations are open (which means that anyone who is a unit member is eligible to nominate any other unit member, including himself/herself for office). The term for each office is from September 1, 201_, to August 31, 201_. Anyone wishing to run for office should file a declaration of candidacy form so that it is received at the unit office, 123 Main Street, Anytown, **no later than 5:00 p.m. on** Wednesday, April 25, 201_. (Postmarked date not accepted.)

Appendix C - Sample Declaration of Candidacy Form

CTA/XYZ UNIT
DECLARATION OF CANDIDACY FOR OFFICE

I hereby declare that I intend to be a candidate for the office of:

	OFFICE	**TERM OF OFFICE**
_____	CTA/XYZ Unit President	_____
_____	CTA/XYZ Unit Vice President	_____
_____	CTA/XYZ Unit Secretary	_____
_____	CTA/XYZ Unit Treasurer	_____

I certify that I am a member in good standing of CTA/XYZ Unit.

Date_____ Signed_____

Please print:

Name _____
(As you wish it to appear on the ballot)

School/Work Address	_____	Home Address	_____
City/Zip	_____	City/Zip	_____
School/Work Phone	_____	Home Phone	_____

This declaration must be received at the CTA/ABC Unit, 123 Main Street, Anytown, **no later than 5:00 p.m. on Wednesday, April 25, 201_.** (Postmarked date not accepted.)

Appendix D- Sample Acknowledgment of Declaration of Candidacy Letter

To: Candidate's Name

From: CTA/XYZ Unit

Re: Election

Date: April 28, 201_

This is to acknowledge receipt of your declaration of candidacy for the position of CTA/XYZ Secretary.

The unit will publish campaign statements of candidates to members via a newsletter. Each candidate is eligible to submit a statement of no more than thirty (30) words regarding his/her candidacy. The statement must be received in the CTA/XYZ Unit office, 123 Main Street, Anytown, no later than 5:00 p.m. on Friday, May 5. Please note that the unit will print only the first thirty (30) words (not including your name) of the statement; in the event there are more than thirty (30) words, words thirty-one (31) and on will be omitted.

A candidate may not accept direct contributions from a unit's treasury or indirect contributions in the form of use of a unit's assets, facilities, staff, equipment, mailings, good will or credit.

The election will be held at each school/work site between May 15 and 18.

Each office requires a majority vote of the ballots cast in order for a candidate to win. If no candidate receives a majority vote on the first ballot, a run-off election will be held between the candidates receiving the two highest votes. The run-off election, if necessary, will be held from June 1-5.

You may have one observer when the ballots are counted at the unit office on May 19, starting at 5:15 p.m. Please let our office know the name of your observer before the counting begins.

The announcement of the results will be made to leadership, candidates and members on May 20.

[Revised 6/11]

Appendix E- Sample Cover Letter to Association Representatives

To: Association Representatives

From: CTA/XYZ Unit

Re: Unit Elections

Date: May 10, 201_

Enclosed with this mailing is a supply of the following election materials for the CTA/XYZ unit members:

Campaign Statement - one for each member
Ballot - one for each member, plus 3 extra*
Voter Registration Roster/Sign-in Sheet(s) - appropriate number on which work site members may sign

Please arrange to have the election conducted at your work site between the dates of May 15 - 18. Each voter must sign the Voter Roster/Sign-in Sheet before receipt of a ballot. Each voter should have an opportunity to cast a secret ballot.

If by some chance you do not have enough ballots, please call the unit office at once. Do NOT duplicate or make your own ballots.

Please return the Voter Roster/Sign-in Sheet, all voted ballots, and unused ballots to the CTA/XYZ Unit office, 123 Main Street, Anytown, no later than 5:00 p.m. on May 19 (Postmarked date not accepted.) Ballots will be counted on May 19, starting at 5:15 p.m.

Enclosures

*If a member incorrectly marks a ballot, mark it "VOID" and give the member a new ballot. Return the Void Ballot, make a note of the circumstance, and initial the Void Ballot.

Appendix F- Sample of Statements from Candidates

Names are listed in the order of the CTA Alphabet:

D C V U Z M Y G L Q E N H O B A S W T J I R X F P K

(Please note: the CTA Alphabet changes annually.)

CTA/XYZ Unit

Campaign statements have been received from candidates for office for 201_ - 201_.

CTA/XYZ Unit President

BROWN, MARY - (statement here)

RED, HERMIONE - (statement here)

CTA/XYZ Unit Vice President

GREEN, DAVID- (statement here)

GRAY, LETITIA - (statement here)

CTA/XYZ Unit Secretary

BLACK, ELIZABETH - (statement here)

PURPLE, DAN - (statement here)

CTA/XYZ Unit Treasurer

ORANGE, BRIGETTE - (statement here)

BLUE, JOHN - (statement here)

WHITE, BEN- (statement here)

Appendix G- Sample Voter Sign-in Sheet

CTA/XYZ Unit
VOTER SIGN-IN SHEET

School/Work Site___________________________________

I certify that I am a member of the CTA/XYZ Unit for 201_ and am eligible to vote for unit officers.

Signature	Print Name

This Voter Sign-in Sheet must accompany the ballots.

Appendix H- Sample Ballot

CTA/XYZ UNIT
201_ BALLOT FOR OFFICERS

To vote for a candidate, place a cross (X) in the square to the right of the name of the candidate for whom you wish to vote. If you wish to vote for a write-in candidate, write in the name space provided and place a cross (X) in the square to the right of the name.

CTA/XYZ UNIT PRESIDENT Term of Office:	VOTE FOR ONE
MARY BROWN	☐
HERMIONE RED	☐
WRITE-IN CANDIDATE _____	☐

CTA/XYZ UNIT VICE PRESIDENT Term of Office:	VOTE FOR ONE
DAVID GREEN	☐
LETITIA GRAY	☐
WRITE-IN CANDIDATE _____	☐

CTA/XYZ UNIT SECRETARY Term of Office:	VOTE FOR ONE
ELIZABETH BLACK	☐
DAN PURPLE	☐
WRITE-IN CANDIDATE _____	☐

CTA/XYZ UNIT TREASURER Term of Office:	VOTE FOR ONE
BRIGETTE ORANGE	☐
JOHN BLUE	☐
BEN WHITE	☐
WRITE-IN CANDIDATE _____	☐

Return this ballot to your building representative no later than 4:15 p.m. on May 18.
Your association representative must turn in the ballots to the CTA/XYZ Unit office, 123 Main Street, Anytown, no later than 5:00 p.m. on May 19 in order for the ballots to be counted.

CTA/XYZ UNIT
Teller's Report

	CTA/XYZ Unit President		CTA/XYZ Unit Vice President		CTA/ZYX Unit Secretary		CTA/XYZ Unit Treasurer	
Total Ballots Cast	300		300		300		300	
Blank Ballots	10		6		0		6	
Illegal Ballots	7		0		0		5	
Legal Votes Cast	283		294		300		289	
Number of Votes Needed to Elect	Majority	142	Majority	148	Majority	151	Majority	145
Candidates	Mary Brown	175	David Green	145	Dan Purple	100	Brigette Orange	109
	Hermione Red	102	Letitia Gray	146	Elizabeth Black	200	John Blue	146
	Kitty Yellow (Write-in)	6	Colonel Mustard (Write-in)	3			Ben White	34

_____ _____ _____ _____ _____

Date Teller Teller Teller Teller

Appendix J- Sample Announcement of Results

The CTA/XYZ Unit Elections Committee is announcing the results of the election held between May 15-18, 201_, for Unit Officers for 201_.

CTA/XYZ UNIT PRESIDENT:

Total Ballots Cast	300
Blank Ballots	10
Illegal Ballots	7
Legal Votes Cast	283
Number of Votes Needed to Elect	142
Mary Brown	175
Hermione Red	102
Kitty Yellow (write-in)	6

CTA/XYZ UNIT VICE PRESIDENT:

Total Ballots Cast	300
Blank Ballots	6
Illegal Ballots	0
Legal Votes Cast	294
Number of Votes Needed to Elect	148
David Green	145
Letitia Gray	146
Colonel Mustard (write-in)	3

A run-off election will be held between Letitia Gray and David Green since no candidate received a majority of the votes cast on the first ballot.
The run-off election will be held between June 1-5 at the individual school/work sites.

CTA/XYZ UNIT SECRETARY

Total Ballots Cast	300
Blank Ballots	0
Illegal Ballots	0
Legal Votes Cast	300
Number of Votes Needed to Elect	151
Elizabeth Black	100
Dan Purple	200

CTA/XYZ UNIT TREASURER:

Total Ballots Cast	300
Blank Ballots	6
Illegal Ballots	5
Legal Votes Cast	289
Number of Votes Needed to Elect	145
Brigette Orange	109
John Blue	146
Ben White	34

Appendix K – Sample Recall Petition

Pursuant to the provisions of Article IV, Section 3 of the California Teachers Association Bylaws, the undersigned members of the California Teachers Association submit this petition signed by 25% of the voting members of the State Council of Education and respectfully seek the recall and removal of _____from the office of_____.

Names(s) and chapter affiliate(s) of person(s) filing petition.

Name	***Chapter Affiliate***

Registered, prior to circulation, with the Secretary of the California Teachers Association on _____ and filed with the Secretary on _____ within 30 days of the end of circulation.

Each signature must be in ink.

Print Name	***Signature***	***Chapter Affiliation***	***Date***
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

Appendix K(a)- Sample Recall Ballot

CTA/XYZ UNIT
201_ RECALL ELECTION

OFFICIAL BALLOT

To vote on the recall, place a corresponding mark ("X", "✓", etc.) in the box to the left of the word "YES" or "NO".

To vote for a candidate, place a corresponding mark ("X", "✓", etc.) in the box to the left of the name of the candidate for whom you wish to vote. If you wish to vote for a write-in candidate, write in the name space provided and place a corresponding mark ("X", "✓", etc.) in the box to the left of the name.

Shall DAN PURPLE be recalled (removed) from the office of CTA/XYZ Unit President upon certification of a majority vote to recall the President by the Elections Committee?

VOTE FOR ONE

☐ YES

☐ NO

Candidates to succeed DAN PURPLE as CTA/XYZ Unit President if he is recalled:
Term of office:

VOTE FOR ONE

☐ MARY BROWN

☐ HERMIONE RED

WRITE-IN CANDIDATE

☐ _____

Voted ballot must be received in the envelopes provided at the CTA/XYZ Unit office, 123 Main Street, Anytown, USA, no later than 5:00 p.m. on May 19. Ballots received after this deadline will not be counted.

[Adopted 6/13]

CTA/XYZ UNIT
TELLER'S REPORT

Total Ballots Cast									
Blank Ballots									
Illegal Ballots									
Reason(s) for Illegal									
Legal Ballots Cast									
Votes Needed to Elect									
Candidate(s):									
Write-In's (If Any)									

Elections Committee Chair	Member	Member	Member	Member
Member	Member	Member	Member	Member

Appendix M – Signature and Ballot Verification Sheet

Signature and Voted Ballot Verification

Please attach to voter rosters and ballots from each voting site. Copy if needed.

Signatures on the roster _____

Number of **Voted** Ballots Received _____

Verified by:_____

[Adopted 6/12]

Appendix N – Original Election Challenge Form

Please remember that a challenge to a local chapter/unit must first go to the local elections committee chairperson and local president. If the findings of the local elections committee did not satisfy the challenger(s), within 10 days of those findings, then the exact same challenge may be appealed to the CTA president along with the official CTA Appeal Form located in Appendix O. (Note: Rules governing state council elections are located in the white manual section of the *CTA Elections Manual*.)

***Please note that challenges to any State NEA RA Delegate elections must be filed directly with the CTA President.** (Please use the form located in Appendix S of the *CTA Elections Manual.*)

In order to file a challenge to a unit election, the challenger(s) shall complete the following items and attach copies of all documents required to support the challenge:

The challenge as represented in this form, with attachments, shall first be submitted to the unit's election committee chairperson and president within the timelines as specified in CTA's *Requirements for Chapter Election Procedures*.

I/we wish to file a challenge to an election as follows:

Challenger 1 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

Challenger 2 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

(If there are additional chapter/unit members challenging the election, please include their information on a separate page & attach.)

Type of Election/Officer position(s) being challenged (check only those that are being challenged):

- ❑ President
- ❑ Vice President
- ❑ Secretary and/or Treasurer
- ❑ Director(s)
- ❑ State Council Representative
- ❑ State Council Alternate
- ❑ Local NEA RA Delegate
- ❑ Other _____

Election Dates: _____ Date Ballots Counted

_____ Date Results Posted (including any run-offs if necessary)

Witnesses: Individuals who can serve as witnesses, what they can attest to, and contact information for each:

Witness 1 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

Witness 2 Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

(If there are more witnesses, please include their information on a separate page and attach.)

Chapter Information:

Chapter Name:	Office #:
Chapter Email:	Fax #:

Chapter President Name:	President's Phone #:
President's Email Address:	

Chapter Elections Committee Chair Name:	Elections Chair Phone #:
Elections Chair's Email Address:	

Attach the following:

1. Cite the local bylaws, standing rules, and/or *CTA Elections Manual* section(s) and then summarize how and when they were violated.
2. Copies of election materials, for example: timelines, instructions, chapter literature related to the election, campaign flyers, copy of ballot, copy of teller's report, etc.
3. Local unit bylaws and standing rules.
4. Individual Witness Documentation form(s) if any witnesses are reported above.

[Revised 6/11, 6/13, 6/14]

Individual Witness Documentation

Witness 1 Name (please print) ______________________________

Do you believe you witnessed an election violation? ❑Yes ❑No
If yes, please briefly describe the election violation:

Witness
Signature ______________________________ Date ______________

✂- -

Individual Witness Documentation

Witness 2 Name (please print) ______________________________

Do you believe you witnessed an election violation? ❑Yes ❑No
If yes, please briefly describe the election violation:

Witness
Signature ______________________________ Date ______________

[Adopted 6/14]

Appendix O – Official CTA Appeal Form

TO: CTA President

I/we wish to file an appeal to the decision of my unit's governance body in response to an election challenge. (Please check): ❑ I am the original challenger.
❑ I am not the original challenger, but I am a candidate affected by the decision of my unit's governance body in response to an election challenge.

Appealer Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

Chapter Information:

Chapter Name:	Office phone & email:
Chapter President:	President phone & email:
Chapter Elections Committee Chair:	Elections Committee Chair phone & email:

Type of Election/Officer position(s) being challenged (check only those that are being challenged):

❑ President ❑ Director(s) ❑ Local NEA RA Delegate
❑ Vice President ❑ State Council Representative ❑ Other _____
❑ Secretary and/or Treasurer ❑ State Council Alternate

Election Dates: _____ (Date Ballots Counted) _____ (Date Results Posted (including any run-offs if necessary))

Challenge Dates: _____ (Date Original Challenge Filed with Local) _____ (Date Local Decision was Made)

Result of Local Decision: (Check all that applies)
❑ Challenge denied ❑ Challenge upheld
❑ Election results upheld ❑ Election to be re-run
❑ Other: (please specify)

Attach the following:

1. If you are the original challenger, attach your original challenge form. If you are not the original challenger, you may submit this form by itself.
2. Copies of election materials, for example: timelines, instructions, chapter literature related to the election, campaign flyers, copy of ballot, copy of teller's report, etc.
3. Local chapter executive board's written decision.

[Adopted 6/13]