

Elections Handbook

2013–2014

ELECTIONS ARE IMPORTANT

The purpose of this handbook is to assist in the proper and smooth operation of the IEA-NEA elections as required by the Landrum-Griffin Act. The rules and guidelines described shall be strictly followed. Keep this document for future reference.

- **Check all governing documents – local, region, state and national**
- **Conduct an election**
- **Follow the approved timeline**
- **Ensure the secrecy of the ballots**
- **Do not disenfranchise your members**
- **Resources for help**
 - **Local Elections Chairperson**
 - **Regional Elections Chairperson**
 - **State IEA-NEA Elections Committee (See page one)**
 - **State IEA-NEA Elections Committee Staff Liaison –
Debra Knox, 1/800/252-8076 or debbie.knox@ieaneae.org**
 - **IEA President's Office**
- **While online balloting is not yet approved by the Department of Labor, the IEA Elections Committee is attempting to incorporate electronic processes where appropriate.**

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GLOSSARY OF ABBREVIATIONS

ESP	Educational Support Professional
IEA	Illinois Education Association
IEA-R	Illinois Education Association-Retired
NEA	National Education Association
RA	Representative Assembly

2013-2014 IEA-NEA ELECTIONS CALENDAR

	IEA RA RETIRED DEL.	IEA RA STUDENT DEL.	*IEA RA DEL	OFFICERS/ NEA DIR.	NEA RA RET. & STUD. DEL.
JULY	31 Membership Figures		31 Membership figures		
AUG.			# of delegate positions to regions		
SEP.	Notice in ADVOCATE	Notice in ADVOCATE			
OCT.	4 Nominations due 9 Sample ballots & bios sent 16 Last day for ballot correction 30 Ballots mailed	15 Membership figures	2 Election plans due 2 Allocation plans due 11 Allocation approved 18 Approved plans returned to regions		
NOV.		1 Nominations due 6 Sample ballots & bios sent 13 Last day for ballot correction 18 Ballots mailed	Plans in ADVOCATE Nominations due to region committee 27 1st day elections can be held	Notice in ADVOCATE	
DEC.	11 BALLOTS DUE 13 Ballots Counted 20 Candidates notified of results	11 BALLOTS DUE 13 Ballots Counted 20 Candidates notified	16 Last day elections can be held. 31 Names due in President's Office	6 Candidate pictures & bios due for publication	Notice in Dec-Jan ADVOCATE
JAN.	3 Run-off Ballots Mailed 22 RUN-OFF BALLOTS DUE 24 Ballots counted 31 Candidates Notified	3 Run-off Ballots Mailed 22 Run-off Ballots Due 24 Ballots Counted 31 Candidates Notified	BE SURE TO USE RUN-OFF DATES PROVIDED IN ORIGINAL NOTICE IF NECESSARY	1 Declaration of Candidacy Due	15 Retired membership figures
FEB.				Feb Advocate candidate pictures & bios printed	12 Nominations due 19 Sample ballots & bios sent
MAR.					5 Last day for ballot correction 15 Student mbrshp figures 19 Ballots Mailed
APR.				12 ELECTIONS HELD AT RA	23 BALLOTS DUE 25 Ballots Counted
MAY					2 Candidates notified of results 9 Run-off Ballots mailed
JUNE					4 RUN-OFF BALLOTS DUE 6 Run-off Ballots counted 13 Candidates notified of results

NOTES: ***ELECTIONS CONDUCTED BY REGIONS**

2013-2014 IEA-NEA ELECTIONS CALENDAR

*NEA RA LOCAL/CLUSTER	NEA RA STATE	ESP/HI ED/RETIRED/ E-M REP	*REGIONAL CHAIR/V-CHAIR	
				JULY
				AUG.
				SEP.
2 Election plans due 11 Election plans approved 18 Approved plans returned to regions			2 Election plans due 11 Election plans approved 18 Approved plans returned to regions	OCT.
		4 Elections Committee notified of vacancies		NOV.
Plans in Dec-Jan ADVOCATE	Notice in Dec-Jan ADVOCATE	Notice in Dec-Jan ADVOCATE	Plans in Dec-Jan ADVOCATE	DEC.
15 Membership figures	15 Membership figures			JAN.
	12 Nominations due 19 Sample ballots & bios sent	12 Nominations due 19 Sample ballots & bios sent		FEB.
1 1st day elections can be held 31 Last day elections can be held	5 Last day for ballot correction 19 Ballots Mailed	5 Last day for ballot correction 19 Ballots Mailed	1 1st day elections can be held	MAR.
10 Names due in President's Office	23 BALLOTS DUE 25 Ballots Counted	23 BALLOTS DUE 25 Ballots Counted	24 Last day elections can be held	APR.
BE SURE TO USE RUN-OFF DATES PROVIDED IN ORIGINAL NOTICE IF NECESSARY	2 Candidates notified of results 9 Run-off Ballots mailed	2 Candidates notified of results 9 Run-off Ballots mailed	9 Names/Report due in President's Office	MAY
	4 RUN-OFF BALLOTS DUE 6 Run-off Ballots counted 13 Candidates notified of results	4 RUN-OFF BALLOTS DUE 6 Run-off Ballots counted 13 Candidates notified of results	BE SURE TO USE RUN-OFF DATES PROVIDED IN ORIGINAL NOTICE IF NECESSARY	JUNE

**2013-2014
PRE-APPROVED BY THE IEA-NEA ELECTIONS COMMITTEE**

REGION _____ ELECTION PLAN

	IEA RA DELEGATE ELECTION RUN OFF		NEA RA LOCAL DELEGATE ELECTION RUN OFF		(if applicable) REGIONAL OFFICES ELECTION RUN OFF	
PART A: NOMINATIONS SENT	10/23/13	N/A	1/22/14	N/A	1/22/14	N/A
NOMINATIONS DUE	11/13/13	N/A	2/12/14	N/A	2/12/14	N/A
ELECTION DATE	12/04/13	1/16/14	3/05/14	3/26/14	3/05/14	3/26/14
TIME OF ELECTION	School Hours	School Hours	School Hours	School Hours	School Hours	School Hours
PLACE OF ELECTION	School Buildings	School Buildings	School Buildings	School Buildings	School Buildings	School Buildings
DATE OF TALLY (within 7 days of election)	12/11/13	1/23/14	3/12/14	4/02/14	3/12/14	4/02/14
TIME OF TALLY	* _____	* _____	* _____	* _____	* _____	* _____
PLACE OF TALLY	* _____	* _____	* _____	* _____	* _____	* _____

_____ Check here if no ballots are returned by mail by individual members or by locals.

_____ Check here if ballots are returned by mail by individual members and/or by locals. If so, please complete Part B also.

PART B:

DATE BALLOTS MAILED (at least 15 days prior to tally date)	11/25/13	1/08/14	2/25/14	3/18/14	2/25/14	3/18/14
LATEST DATE BALLOTS MAY BE RECEIVED FOR TALLY	12/10/13	1/22/14	3/11/14	4/01/14	3/11/14	4/01/14
RETURNED BALLOTS MAILED TO (must be a P. O. Box)	* PO Box _____ City _____	* PO Box _____ City _____	* PO Box _____ City _____			

BE SURE TO COMPLETE

2013-2014 ELECTIONS COMMITTEE

Martha Bowman (IEA-R)	C: 618/967-9273	bowmanmv4@gmail.com
Gerry Casey (IEA-R)	H: 217/529-7355	kcathome@fgi.net
Jack Casey (IEA-R)	H: 217/529-7355	kcathome@fgi.net
Laurel Dieskow (IEA-R)	H: 708/301-4363 C: 708/828-1169	ldieskow@yahoo.com
Joyce Francis (IEA-R)	H: 309/693-4451	joycefrancis1953@comcast.net
Mike Orr (18)	C: 309/236-4586 S: 309/793-8020	mike.orr2010@yahoo.com
John Phillips (IEA-R)	H: 618/513-2007	sphillips45@yahoo.com
Tia Stevens (41)	H: 847/705-5884 S: 847/400-8730	tiastevens@comcast.net
Bill Wright (IEA-R)	H: 630/896-1474	bwright1553@gmail.com

**IF YOU HAVE ANY ELECTIONS QUESTIONS DURING THE YEAR, PLEASE FEEL FREE
TO CONTACT ONE OF THE ELECTIONS COMMITTEE MEMBERS,**

Or

Refer to the IEA web site for election information and forms at www.ieaneae.org

Or contact

**DEBRA KNOX, STAFF LIAISON
AT
1/800/252-8076
or
debbie.knox@ieaneae.org**

GUIDELINES FOR LOCAL, REGION AND STATE ELECTIONS

The purpose of this handbook is to assist in the proper and smooth operation of the IEA-NEA elections as required by the Landrum-Griffin Act. The rules and guidelines described shall be strictly followed. Keep this document for future reference.

All state offices are open to all members within the state. All regional offices are open to all members whose local is within that region. All local offices are open to any member of that local. All Higher Education Council offices are open to all members employed by institutions of higher education. All Educational Support Professional Council offices are open to all members who are employed as Educational Support Professional. All Retired Council positions and retired member delegate positions are open to all retired members. All student member delegate positions are open to all student members. All elections shall be held in compliance with IEA-NEA Constitution and Bylaws and the elections procedures described in this Elections Handbook.

Fair share members are not entitled to participate in the election process.

ELECTIONS PROCESS

1. Elections of officers for local, region, state, or national offices must be conducted by secret ballot either directly by members eligible to vote, or in state and national elections, they may be conducted indirectly by persons elected by members to represent them in accordance with the bylaws governing the election.

A secret ballot may not be by proxy.

Voting may not be done by phone, show of hands, voice vote or standing vote.

2. Notice of state and national elections must be mailed to each member at his/her last known address at least 15 days prior to the election. (The day the notice is mailed is not counted, but the day of election is counted.) Information regarding runoff timelines **must** be included. A 15-day notification of local elections may be given by posting or other means.
3. Notice of nominations may be given in any manner reasonably calculated to reach all members in sufficient time to permit such members to nominate the candidates of their choice. In the cases where nominations are mailed to the IEA-NEA President's Office, they must be mailed by certified mail, any other delivery service in which a receipt is issued or links to electronic nomination forms may be found on the IEA website (www.ieane.org/about/elections) for all statewide mail ballot elections. Email nominations may be accepted at the local's/region's option, if provided for in writing in a local's/region's governing documents.
4. No person on the State, Regional, or Local Elections Committee who is a candidate shall be involved in any manner in the operational procedure of the election for which they are seeking office.
5. No portion of dues money collected at the local, regional, state or national level shall be used to promote the candidacy of any individual over another for any office.
 - Any material printed and/or distributed by the IEA or an IEA affiliate must be informational in nature. Such materials shall be restricted to factual statements expressing a candidate's views on issues or providing autobiographical information. Statements or messages shall be limited to objective facts. They shall not include subjective statements about candidates, shall not contain testimonials, and shall not include explicit or implicit references to or comparisons with other candidates or their campaign themes. They may contain factual information on the candidate and the office that he or she is seeking.
 - Campaign activities at an IEA function (meeting, conference, social event, and so forth) must be incidental to the function and must not intrude on the planned program. Campaigning may take place before or after the function and between sessions (e.g. at meal breaks).
 - An elected or appointed official at any association level when on assignment for the association and/or traveling at the association's expense, while also a candidate for another position, may campaign as long as such campaigning is incidental to the assignment and does not interfere with the individual's performance of his or her duties.
6. Elections must be conducted on the date published. In the event of an emergency school closing, the election will be conducted on the next day school is in session.
7. Provision should be made for absentee voting. Appropriate steps must be taken to maintain the secrecy of such ballots and to prevent abuses.

GUIDELINES FOR LOCAL, REGION AND STATE ELECTIONS

8. When the number of candidates equals the number of positions available, candidates may be declared elected provided that no write-in votes are permitted. (See individual elections regarding write-in requirements.)
9. Each candidate has the right to have observer(s) at each polling place.
10. The official tally shall take place as soon after the election as possible. In no event shall the tally be more than 7 days after the election. Candidates and/or their observer(s) may be present at the tally and know the results. Ballots must be secured at all times.
11. A majority of valid votes cast shall be used to determine the results of an election unless otherwise provided for in documents governing the election. A majority shall be defined as more than half of the valid votes cast.
12. Runoff elections shall be held in the same manner as the original election. The number of candidates appearing on the runoff ballot will be one more than the number of positions available.
13. Any member(s) desiring to challenge the conduct of any election shall file a written challenge according to the procedures set forth in Article IV, Section 3 of the IEA-NEA Bylaws and the Election Challenge Procedures of the Elections Handbook.

BALLOT INFORMATION

1. The ballot must minimally include office(s) to be filled; candidates' names; number to vote for; and provision for write-in votes if required. In the case of a write-in, the candidate's name and position sought must be clearly specified. (See individual elections to determine if write-ins are required.)
2. Positioning of the names on the ballot must be determined by a lot drawing. A write-in provision is required if the number of declared candidates is less than the number of positions available.
3. All **eligible members** must be provided a reasonable opportunity to be nominated for and to vote in elections. Ballots shall be distributed in such a manner as to ensure the secrecy of the ballot. (Ballots must not be left unattended or accessible to unauthorized persons.) Each eligible voter shall be provided with an official ballot. Ballots must be cast so the person voting cannot be identified with the choice voted for. A pre-printed signature roster system is required to ensure only eligible voters voted and to certify the number of votes cast. Ballots must be secured at all times.
4. Individually mailed ballots must be mailed to members and/or locals at least 15 days prior to the date when they must be received in order to be counted. Instructions for voting and returning the ballots shall accompany the ballot. A double envelope method for voting by mail is required. A form of voter identification must appear on the outer return envelope.
5. All mail ballots (from locals or individuals) are to be directed to a Post Office Box and shall be picked up only by a person authorized by the Elections Committee. Election observers may accompany said person. Ballots must be secured at all times. (Mailed ballots refer to U.S. mail.) Voted ballots from a local may also be hand-delivered to the tally site providing a secure place for such ballots has been designated.
6. Voted valid ballots shall be counted as long as the intention of the voter can be clearly determined. Only valid votes cast shall be used to determine an election.
7. Ballots, including used, unused and challenged ballots, envelopes used to return marked ballots in a mail ballot election, tally sheets, roster/signature sheets, and all related election documents must be sealed and kept together for one year.

REPORTING ELECTIONS

1. Results of the election must be published in a timely manner which allows members to obtain the list of all candidates and total votes received by each candidate without unusual effort.

GUIDELINES FOR LOCAL, REGION AND STATE ELECTIONS

SAVINGS CLAUSE

1. Should it become necessary as the result of an order by a court of competent jurisdiction to elect additional officers or to conduct a new election for a previously elected officer, the election shall in that case be by direct mail, secret ballot submission, to the active membership of the Association.

POLICY FOR CANDIDATE'S USE OF SOCIAL MEDIA, ELECTRONIC EQUIPMENT OR SERVICES

1. A candidate* for IEA office/position may not use for campaign purposes any service, including online service, to which he or she has access as the result of the expenditure of any resources by NEA, IEA or its affiliates. Electronic equipment would include, but not be limited to, computers, modems, cellular telephones, and electronic pagers. Online services would include, but not be limited to NEA's and IEA's Wide Area Network, local area networks established by NEA affiliates, or the Internet through access provided by NEA, IEA or its affiliates (e.g., Association electronic address).
2. A candidate for IEA office may use for campaign purposes any electronic equipment or service to which he or she has access without the expenditure of any resources by NEA, IEA or its affiliates, provided that the candidate may not receive any assistance in such use from any individual who at the time of providing the assistance is receiving compensation from NEA, IEA or its affiliates. A candidate has complete control over the content of messages that he or she transmits on such equipment or service.
3. No IEA candidate may place any campaign messages on NEA or IEA Online message boards.
4. A candidate for IEA office must be careful when it comes to using IEA or IEA-reimbursed electronic equipment or services to follow or communicate through **Facebook**, **Twitter** or other social media with an IEA member who has become a "Friend" or "Fan" of a candidate or the candidate's campaign committee members. Being/becoming a "Friend" or "Fan" of a member who has a **Facebook** page (i.e., "Jane Doe") and has become a candidate is not by itself a violation of the IEA Policy. If, however, while you are using IEA or IEA-reimbursed electronic equipment or services, you post an initial or responsive message on that candidate's individual **Facebook** page that is supportive of his/her candidacy or non-supportive of his/her opponent's candidacy, a violation will occur. Also if you 1) become a "Friend" or "Fan" of a candidate (i.e., "Jane Doe for IEA President") or candidate campaign committee (i.e., "Jane Doe for IEA President Campaign Committee") **Facebook** page or 2) send a direct message or response to or "re-tweet" a posting from a candidate's **Twitter** account that is supportive of his/her candidacy or non-supportive of his/her opponent's candidacy while using IEA or IEA-reimbursed electronic equipment or services, a violation will occur. Merely following a candidate on **Twitter** without any other action by you, however, is not a violation of the IEA Policy.

*For purposes of this Policy, the term "candidate" means the candidate and anyone acting on his or her behalf, or at his or her direction.

LIST OF ELECTIONS

ELECTIONS CONDUCTED BY IEA-NEA STATE ELECTIONS COMMITTEE

MAIL BALLOTS

IEA RA RETIRED DELEGATES
IEA RA STUDENT DELEGATES
NEA RA RETIRED DELEGATES
NEA RA STUDENT DELEGATE(S)
NEA RA STATE DELEGATES
ESP CHAIR, VICE-CHAIR AND COUNCIL
ESP SECTIONAL REPRESENTATIVES AND ALTERNATES
HIGHER ED. CHAIR, VICE-CHAIR AND COUNCIL
HIGHER ED. SECTIONAL REPRESENTATIVES AND ALTERNATES
RETIRED CHAIR, VICE-CHAIR AND COUNCIL
ETHNIC MINORITY SECTIONAL REPRESENTATIVES AND ALTERNATES

AT THE IEA RA

EXECUTIVE OFFICERS (PRES., VICE-PRES, SEC.-TREAS.)
NEA DIRECTORS

ELECTIONS CONDUCTED BY REGIONAL COUNCILS

(Allocation and Election Plans approved by IEA-NEA Election and Executive Committees)

DATES ESTABLISHED BY REGION COUNCIL & PUBLISHED IN ADVOCATE

CHAIR AND VICE-CHAIR ELECTIONS
AT- LARGE ETHNIC MINORITY REPRESENTATIVE(S) ON REGION COUNCIL
IEA RA DELEGATES - For locals with a ratio of members of 1:90-110, the delegate elections may be conducted solely by the local if so determined by the regional council.
REGIONAL ETHNIC MINORITY DELEGATE AT-LARGE TO IEA RA
NEA RA DELEGATES - For locals with over 76 members, the delegate elections may be conducted solely by the local if so determined by the regional council. Chartered locals with fewer than 75 members are to be clustered.

ELECTIONS CONDUCTED BY THE LOCALS

DATES ESTABLISHED BY THE LOCALS

LOCAL EXECUTIVE OFFICERS
LOCAL BUILDING REPRESENTATIVES
REGIONAL COUNCIL REPRESENTATIVES
ALL LOCAL OFFICES

(All elections must be conducted in accordance with IEA-NEA Bylaws and Elections Procedures outlined in the current State Elections Handbook.)

IEA-NEA DELEGATES TO IEA RA

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ July 31 - Membership figures.
- ◆ September Regional Council Meeting - Regional Elections Committee Elected or Appointed.
- ◆ Prior to September 1 - Number of delegate positions allocated to the regions distributed by President's Office. Membership figures to be used for delegate allocation will be distributed to region chairs.
- ◆ Prior to the October State Elections Committee Meeting - Regional Council establishes an election date that falls within the dates designated on the IEA-NEA Elections Calendar. The Regional Council must electronically submit the election and allocation plans to the State Elections Committee. (*Worksheet in Forms Section of this Handbook.*)
- ◆ October State Elections Committee Meeting - State Elections Committee reviews plans.
- ◆ One week after October State Elections Committee Meeting - Approved or rejected Plans returned to regions.
- ◆ **November issue of the ADVOCATE** mailed to members with dates, times and places of elections to be held **is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Nominations must be received by Regional Elections Committee according to the Regional Election Plan.
- ◆ Local/regional ethnic minority at large elections held according to same timelines.
- ◆ At least fifteen days prior to the date ballots must be received for tally - Post mail ballots.
- ◆ On the published election date - Conduct the election.
- ◆ Within one week of election - Tabulation of ballots.
- ◆ If necessary, runoff elections shall be held in the same manner as the original election.
- ◆ Within one week of tabulation - Election report sent to all candidates, local association presidents and the President of IEA-NEA.
- ◆ Next Regional Council Meeting - Verified results submitted.

(THIS TIMELINE REFERS TO BOTH REGION DELEGATES AND AT LARGE ETHNIC MINORITY REGIONAL DELEGATES TO THE IEA-NEA RA)

IEA-NEA DELEGATES TO IEA RA

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require **regional and at large ethnic minority delegates** to the IEA-NEA RA to be elected by open nomination and secret ballot. All active members of the region are entitled to seek the office, nominate and vote. The Regional Council shall elect or appoint a Regional Council Elections Committee of no fewer than three (3) active members of the Region, none of whom shall be a candidate. While this Committee has the exclusive responsibility for conducting the election in compliance with the election procedures which follow, the Regional Council may vote to delegate this responsibility to the Elections Committee of a non-clustered local. Hereinafter the Regional Elections Committee, or its designee, shall be referred to as "the Committee".

Section 1. - PARTICIPATION IN THE ELECTION PROCEDURE - No candidate in the election may participate in any way in the operational procedure of the election.

Section 2. - ESTABLISHMENT OF THE ELECTION DATE - Prior to the October State Elections Committee Meeting - The Committee establishes, with the approval of the Regional Council, election and allocation plans. Regional Council must electronically submit its election and allocation plans for approval to the State Elections Committee. (*Worksheet in Forms Section of this Handbook.*)

Section 3. - NOMINATIONS - Notice of nominations must be distributed in any manner reasonably calculated to reach all members in sufficient time to permit members to nominate the candidates of their choice. Members may nominate themselves. The nomination forms shall minimally include the name of the nominee and local, the name of the nominator and local, and the written consent of the nominee. Nominating forms shall be received by the Committee at least three (3) weeks prior to the election date. In the event that no nominations are received, the Committee will seek out a candidate(s).

Section 4. - NOTIFICATION - Notice of election must be mailed to each member at his/her last known address no later than fifteen (15) days prior to the election. (The day the notice is mailed is not counted, but the day of the election is counted.) The ADVOCATE will publish in the November issue, election plans that have been approved by the State Elections Committee at their October meeting. The Regional Council, all local presidents and all candidates will be notified in writing of the names of all those running for IEA-NEA delegates. The Committee may choose an appropriate method of disseminating information regarding the qualification of candidates; however, no dues money may be used to promote one candidate over another.

Section 5. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the chairperson of the Committee.

Section 6. - ELECTION - The election shall be conducted on the date published. If not, notice of the change must be mailed to each member at his/her last known address no later than fifteen (15) days prior to the election. The Committee is responsible for the preparation, distribution, collection, tabulation, reporting and storing of the ballots and related election materials. The Committee shall determine the position of candidates on the ballot by lot. The Committee shall not allow proxy voting. The ballot should minimally include office to be filled, candidates' names, number to vote for, and provision for write-in candidates.

IEA-NEA DELEGATES TO IEA RA

The Committee shall post any ballots mailed to individual members no later than fifteen (15) days prior to the date when they must be received in order to be counted. These mail ballots must include instructions for voting and returning the ballots. A double envelope method is required and a form of voter identification must appear on the outer return envelope. All mail ballots must be returned to a Post Office Box and shall be picked up only by a member of the Elections Committee or a designee appointed by the Chairperson.

For ballots voted in the locals, the Committee will require a pre-printed signature roster system to ensure only eligible voters voted and to certify the numbers of votes cast. Ballots shall be distributed in such a manner as to ensure all eligible members are provided a reasonable opportunity to vote, that the secrecy of their ballot is ensured, and that a record of those voting is maintained. Ballots may not be placed in mailboxes. A manned polling place or a system of personally contacting each voter must be established. Candidates have the right to have observers present at all polling places. The overriding principle to govern every decision of the Committee is to ensure that each active member is best able to exercise his/her rights and privileges in the election process. To that end, the Committee will choose the means of distribution and collection of ballots which maximizes the probability that each member may vote in the election and that voted ballots are secured at all times.

Section 7. - TABULATION - Within seven (7) days following the election date, the Committee shall count the valid ballots and tabulate the results in accordance with state and federal requirements. Each delegate shall be elected by a plurality of valid votes cast, providing there are open nominations and voting is by secret ballot. However, in an election of an individual to serve both as a local, region, or state officer and as an IEA RA delegate, the delegate shall be elected by the vote required to determine the results of the officer election. Phone tallies are not permitted. Voted valid ballots shall be counted as long as the intention of the voter can be clearly determined. Each candidate shall be notified as to the date, time and location of the tally. Candidates or their designees may be present as poll watchers. Ballots, including used, unused, challenged ballots, envelopes used to return ballots in a mail ballot election, tally sheets, roster/signature sheets, and all related election documents must be sealed and kept for one year.

Section 8. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in the same manner as the original election. The timeline will begin on the date of the tabulation of the original election and the runoff election will be held on the date published in the region's election plan.

Section 9. - REPORTING - The Committee shall prepare a report of the election results to be disseminated. Said report shall minimally include the total number of valid ballots cast, the number of votes for each candidate, the number of write-in votes, the number of spoiled ballots, and a declaration of a winner(s). The report shall be sent to all candidates, and local association presidents, within one week of the tabulation and submitted to the Regional Council at its next meeting. Local Association Presidents shall promptly post the election results in the locals. The Region Chairperson shall submit the results to the IEA-NEA President's Office on the forms provided by that office.

Section 10. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

IEA-NEA DELEGATES TO IEA RA

RULES FOR DEVELOPING REGION ALLOCATION PLANS FOR DELEGATES TO THE IEA-NEA REPRESENTATIVE ASSEMBLY

1. Regional Council shall be responsible for developing a plan.
2. The plan must be approved by the Regional Council.
3. A delegate ratio of 1:90 to 1:110 members will be maintained as closely as possible.
4. Suggested language to appear at the bottom of ballots when one or more locals of more than 100 members are clustered together:

In order to comply with the IEA Bylaw requirement that, "Each chartered local association with a pledged or paid-up membership of 100 or more as of July 31st shall be entitled to elect at least one (1) delegate per 100 active members," votes shall be tallied and candidates declared elected as follows:

- The candidate from (local a) receiving the highest number of votes shall be declared elected.
- The candidate from (local b) receiving the highest number of votes shall be declared elected.
- The remaining candidates shall be ranked in order of votes received. The candidate(s) receiving the highest number of votes shall be declared elected.

5. Sub-clustering* and/or usage of excess members to obtain delegates is prohibited.
6. Use the electronic form provided to complete the delegate allocation plan. (*Worksheet in Forms Section of this Handbook.*)
7. When developing a region allocation/cluster plan, every attempt should be made to include all membership groups so that they have the opportunity to be represented (i.e., ESP's, small locals).
8. Delegate allocation plans MUST include:
 - a. ratio
 - b. number of delegates per local/cluster
 - c. district number and name of local
 - d. approval of the Regional Chairperson and Vice Chairperson
 - e. date of Council approval
 - f. post office box & city (where applicable)
9. If the plan includes any deviation from the established guidelines or any unusual elements, a written rationale (reason for such deviation) must be included for the Elections Committee's consideration.
10. Do not include Chairperson, Vice Chairperson or Ethnic Minority Representative in the delegate count. Count must equal allocation.
11. Failure to meet any of the above rules can be cause for rejection of the allocation plan.

*Sub-clustering refers to the division of a local.

IEA-NEA RA RETIRED MEMBER DELEGATES

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Membership as of July 31 shall determine the number of retired delegates. The ratio shall be one delegate for every 500 members.
- ◆ A retired ethnic minority delegate election will be held according to the same timelines.
- ◆ September ADVOCATE --All retired members notified of open positions, election procedures and nomination forms.
- ◆ By the end of the first week of October, open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Second week of October notify candidates of those running (sample ballots and biographies).
- ◆ By the last Wednesday of October, ballots and candidates' biographies mailed. Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address, by the date listed on the IEA-NEA Elections Calendar.
- ◆ Tabulation of ballots will take place on the date listed on the IEA-NEA Elections Calendar.
- ◆ If necessary, runoff elections shall be held in accordance with the dates published in the September ADVOCATE.
- ◆ Prior to December 31 - Names of delegates to President's Office.

IEA-NEA RA RETIRED MEMBER DELEGATES

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require IEA-NEA Retired member delegates and an ethnic minority retired delegate to the IEA-NEA RA to be elected by open nomination and secret ballot. All IEA-NEA Retired members are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1 - NOMINATIONS - All IEA-NEA Retired members will be notified in the September ADVOCATE that open nominations will be accepted until the end of the first week in October. Nominations must consist of the name, contact information and membership identification number. They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieane.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Section of this Handbook.)*

Section 2. - NOTIFICATION - Second week of October, the Retired Delegate candidates will be sent a sample ballot and biographies of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. - UNCONTESTED ELECTION - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. **Write-in candidates are not permitted.**

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and bulk mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots and biographies will be bulk mailed by the last Wednesday of October. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the first Wednesday in December in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate the ballots in accordance with state and federal requirements. Each delegate shall be elected by a plurality of valid votes cast, providing there are open nominations and voting is by secret ballot. However, in an election of an individual to serve both as a local, region, or state officer and as an IEA delegate, the delegate shall be elected by the vote required to determine the results of the officer election. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the September ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of tabulation. Verified results of the election shall be provided to the Board of Directors by the next Board meeting.

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

IEA-NEA RA STUDENT MEMBER DELEGATES

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Membership as of October 15 shall determine the number of delegates. The ratio shall be one delegate per 100 active student members. If the membership at that time is sufficient, an election will be conducted.
- ◆ The number of open positions, nomination procedures and form, as well as election timelines and procedures will appear in the September ADVOCATE.
- ◆ Nominations must be received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters by the date posted in the September ADVOCATE. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ If necessary, runoff elections shall be held in accordance with the dates published in the September ADVOCATE.
- ◆ Prior to February 15 - Names of delegates to President's Office.

IEA-NEA RA STUDENT MEMBER DELEGATES

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require IEA-NEA Student member delegates to the IEA-NEA RA to be elected by open nomination and secret ballot. All IEA-NEA Student members are entitled to vote. Only student members who are enrolled for a minimum of 12 semester hours may be elected to positions representing student members. Following are the procedures which shall be met to comply with this requirement.

Section 1 - NOMINATIONS - All IEA-NEA Student members will be notified in the September ADVOCATE that open nominations will be accepted until the end of the first week in November. Nominations must consist of the name, contact information and membership identification number. They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieane.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Section of this Handbook.)*

Section 2. - NOTIFICATION – During the second week of November, the Student Delegate candidates will be sent a sample ballot and biographies of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. - UNCONTESTED ELECTION - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. **Write-in candidates are not permitted.**

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and bulk mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots and biographies will be bulk mailed the third week of November. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the second Wednesday in December in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate the ballots in accordance with state and federal requirements. Each delegate shall be elected by a plurality of valid votes cast, providing there are open nominations and voting is by secret ballot. However, in an election of an individual to serve both as a local, region, or state officer and as an IEA delegate, the delegate shall be elected by the vote required to determine the results of the officer election. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the September ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of tabulation. Verified results of the election shall be provided to the Board of Directors by the next Board meeting.

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

IEA RA DELEGATE POLICIES

IEA AND NEA RA DELEGATE EXPENSES REIMBURSEMENT POLICY

The IEA, region councils and local associations may provide funds to advance and/or reimburse RA delegates for expenses incurred in attending the IEA and/or NEA RA. The amount of such delegate funding shall be annually established. To receive reimbursement from delegate funds for expenses incurred or to claim expenses incurred against any advance from such funds, a delegate must properly substantiate expenses, noting the amount, time, place and description of expenses, including receipts for all expenses above \$10, and submit such substantiation on the form designated by the provider of the funds, no later than 60 days after expenses are incurred. Any expenses not properly substantiated shall not be reimbursed or credited. If the delegate has already received an advance to cover such expenses, the delegate must return the amount of such advance not used to pay for properly substantiated expenses. If the delegate does not do so: 1) such unreturned amounts shall be included on an IRS Form 1099 issued to the delegate; 2) disciplinary proceedings may be initiated against the delegate before the IEA Review Board; 3) court proceedings may be initiated to collect the excess amounts; and 4) the delegate may be denied future delegate funding.

IEA AND NEA RA DELEGATE ACCOUNTABILITY POLICY

It is the responsibility of IEA members elected to serve as delegates to the IEA and/or NEA RA to attend all business sessions of the RA, delegation caucuses and briefings, and other required RA business-related meeting(s), as the delegate may be reasonably informed of prior to the required meeting(s). Failure to meet any of these responsibilities, unless excused by the region chair or designee for an IEA RA or NEA RA local delegate, or by the IEA President or designee for an NEA RA state delegate, shall result in the delegate's advance and/or reimbursement for expenses being proportionally reduced. If the delegate has already received an unreduced advance and/or reimbursement, he/she must return any excess amounts. If the delegate does not do so: 1) such unreturned amounts shall be included on an IRS Form 1099 issued to the delegate; 2) disciplinary proceedings may be initiated against the delegate before the IEA Review Board; 3) court proceedings may be initiated to collect the excess amounts; and 4) the delegate may be denied future delegate funding.

IEA-NEA EXECUTIVE OFFICERS AND NEA DIRECTORS

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ November ADVOCATE - vacancies posted.
- ◆ January 1st – Deadline for filing Declaration of Candidacy form.
- ◆ First Friday of December - deadline for submission of candidate pictures and bios to be printed in the ADVOCATE.
- ◆ February ADVOCATE - candidate pictures and bios printed if submitted.
- ◆ Prior to or during the First Business Session at RA - nominations and presentation of candidates at an open meeting. Additional nominations accepted in the event of an election to fill an unexpired term.
- ◆ Saturday morning of RA - Election held.

IEA-NEA EXECUTIVE OFFICERS AND NEA DIRECTORS

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require IEA-NEA Executive Officers (Alternate NEA Directors) and NEA Directors to be elected by open nomination and secret ballot. Pursuant to NEA Bylaws, all elected delegates to the IEA-NEA RA who are active members are entitled to vote.

Section 1. - DECLARATIONS OF CANDIDACY - Vacancies posted in November ADVOCATE. Declaration of Candidacy forms filed by January 1st. Candidates' statements, which are limited to 250 words, and pictures submitted by the first Friday of December will be printed in the February ADVOCATE. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Section of this Handbook.)*

Section 2. - NOMINATIONS - Nominations are open to all active IEA-NEA members. Nominations shall be made at an open meeting at the RA

Section 3. - PRESENTATION OF CANDIDATES - An open meeting shall be held prior to or during the first business meeting of the IEA-NEA RA for the purpose of presenting all candidates for IEA-NEA Executive Offices and/or NEA Director.

The Chairperson of the State Elections Committee shall be the presiding officer. The official timer and the secretary of the State Elections Committee shall be present at the open meeting for nominations. Minutes must be taken and speakers will be timed.

The names of the persons presenting candidates should be reported to the presiding officer at the time specified in the RA Delegate Handbook. All candidates and persons presenting them shall report to the presiding officer at the times specified in the RA Delegate Handbook. *(Form in Forms Section of this Handbook.)*

Presentation of candidates for each office shall be determined by lot. Each candidate shall be limited to a nominator and one seconder. No nominating or seconding speeches shall be allowed. Candidates shall be allowed to speak for no more than five minutes.

Section 4. - ADDITIONAL NOMINATIONS – In the event of an election for an unexpired term, additional nominations may be made following the presentation of candidates who have FILED for that office. If there are additional nominations from the floor, the same rules shall apply. **Write-in candidates are not permitted.**

Section 5. - UNCONTESTED ELECTIONS - If there is only one (1) candidate in an election for Executive Officer and NEA Director, the chair shall declare the candidate elected.

Section 6. - POSITION ON BALLOT - The position of candidates' names on the ballot will be determined by lot.

Section 7. - RULES - The election will take place in accordance with the Standing Rules of the IEA-NEA Representative Assembly.

Section 8. - ELECTIONS - Elections will take place Saturday morning of the IEA-NEA RA. Candidates may have poll watchers present. *(Form in Forms Section of this Handbook.)*

Section 9. - TABULATIONS - The State Elections Committee will tabulate ballots in accordance with state and federal requirements. **Write-in votes will not be counted.** Candidates may have poll watchers present.

Section 10. - RESULTS - The chairperson of the State Elections Committee will announce the results of the election(s) to the RA as soon as the tabulations are finalized. A Certificate of Election of IEA Board Members shall be filed with the President's Office. *(Form in Forms Section of this Handbook.)*

Section 11. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

IEA-NEA EXECUTIVE OFFICERS AND NEA DIRECTORS

CANDIDATE INFORMATION - RA NOMINATIONS

1. An open meeting shall be held for the purpose of presenting all candidates for IEA-NEA office.
2. The Chairperson of the State Elections Committee shall be the presiding officer.
3. The names of the persons presenting candidates should be reported to the presiding officer at the time specified in the RA Delegate Handbook. All candidates and persons presenting them shall report to the presiding officer at the time specified in the RA Delegate Handbook.
4. Presentation of candidates for each office shall be made in the order determined by lot. The lot drawing will be held at the time specified in the RA Delegate Handbook.
5. Each candidate shall be nominated and seconded, but no nominating or seconding speeches shall be allowed.
6. Candidates shall be allowed to speak for no more than five (5) minutes.
7. In the event of an election for an unexpired term, additional nominations may be made following the presentation of candidates who have FILED for that office. Additional nominations may not be made from the floor at any business meeting, nor will speeches in support of any candidates be heard.

CANDIDATE INFORMATION - RA ELECTIONS

1. Refer to campaign regulations.
2. All candidates for office shall be elected by delegates to the Representative Assembly by a majority vote. If a second balloting is needed to determine a (the) winner(s), one more candidate than the number of positions available shall be the nominees. The run-off candidates shall be those with the next highest number of votes in the (first) original election.
3. Article IV, Section 2 (A) states: "All elections shall be conducted by open nomination and secret ballot. If there is only one (1) candidate in an election for Executive Offices and NEA Director, the Chair shall declare the candidate elected."
4. All candidates shall follow the hotel policy regarding display of campaign materials, as provided by IEA. Materials violating the policy will be removed.
5. **Campaign materials, including raffle tickets and other fundraising items for candidates for Association office, may not be distributed or otherwise circulated nor posters displayed in the business meeting room or where they are visible from the seating area. Campaign materials distributed or circulated and posters displayed in violation of this rule shall be collected by RA assistants or members of the IEA-NEA Elections Committee. All displayed campaign literature and materials in the convention center must be removed no later than two hours after election results are reported on the RA floor.**

IEA-NEA EXECUTIVE OFFICERS AND NEA DIRECTORS

6. Polls shall be open for election of officers on Saturday at 7:00 a.m. and will close at 8:45 a.m. There shall not be visible in the polling place campaign materials or any symbols representing a candidate. There shall be no electioneering of any kind within twenty (20) feet of the polling place entrance.
7. In order to vote, delegates must present their delegate badges, show an additional form of signed identification, and sign the voting roster. Electronic scanning ballots and equipment will be used.

IEA-NEA SERVICES AVAILABLE TO DECLARED CANDIDATES FOR IEA-NEA EXECUTIVE OFFICERS AND NEA DIRECTORS

1. Written policy regarding elections shall be sent within one week of filing the "Declaration of Candidacy" form. (*Form in Forms Section of this Handbook.*)
2. Upon request, a list of delegates to the RA will be provided to the candidate. Any additional lists are at the candidate's expense.
3. Candidates may use IEA-NEA file photographs in campaign literature. There will be a \$3.00 charge for each file photograph actually used in campaign literature. All borrowed photos - whether used or not - must be returned to IEA-NEA (c/o ADVOCATE) in a timely manner.
4. IEA-NEA Print Shop can print campaign literature at the candidate's expense.
5. Campaign literature (one piece per candidate) can be sent in the delegate packet at no cost if received one week prior to the mailing date. Any additional mailings are at the candidate's expense.
6. Candidates' pictures and statements will be printed in the February issue of the ADVOCATE and placed on the IEA Web page, if received by the announced deadline. In addition, IEA shall produce and pay for a candidate booklet, composed of each candidate's ADVOCATE statement, which shall be distributed with the delegate packet. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective.
7. IEA will produce and pay for one nonpromotional video providing 3-5 minutes for each candidate, for all candidates who choose to do so.
8. A candidate forum will be held at the RA, time and location to be determined.
9. IEA shall compile a unified candidate questionnaire, which shall replace individual IEA constituent group questionnaires. Responses will be limited to 250 words per question.

**CAMPAIGN REGULATIONS
FOR CANDIDATES FOR IEA OFFICE
IN ELECTIONS HELD AT
THE IEA REPRESENTATIVE ASSEMBLY**

(Where applicable, the principles contained in this document govern all elections for IEA office.)

CAMPAIGN REGULATIONS FOR CANDIDATES FOR IEA OFFICE IN ELECTIONS HELD AT THE IEA REPRESENTATIVE ASSEMBLY

Introduction

The IEA Bylaws set forth the basic requirements for candidates who seek IEA elective office. This booklet, Campaign Regulations for Candidates for IEA Office, is designed to implement those requirements. The document is distributed to candidates who have officially filed for office and to their campaign managers.

The candidate has the responsibility to ensure that all campaign workers are instructed to abide by the campaign regulations.

If a candidate becomes aware of any unauthorized prohibited campaign activity that is being conducted in his/her behalf, the candidate should notify the Chairperson of the IEA Elections Committee, in writing, within forty-eight (48) hours of knowledge of the prohibited activity.

If the Elections Committee learns of any prohibited campaign activity during the IEA Representative Assembly, it will direct immediate cessation of the activity.

The following candidate forms are available from the IEA Executive Office:

- ◆ Official filing form
- ◆ Form for final report of campaign revenues and expenses
- ◆ Form on nominations and candidate speeches

Prospective candidates are encouraged to complete their official filing forms promptly so that they become eligible for the various services that IEA provides for candidates.

I. Election Procedures

In accordance with IEA Bylaws, the Representative Assembly elects the following officers of the Association:

- ◆ The executive officers (President, Vice-President, and Secretary-Treasurer) as appropriate for that year.
- ◆ NEA Directors.*

* These campaign and election regulations incorporate many of the campaign and election regulations that NEA has established for NEA Director elections. However, NEA provides some additional campaign and election regulations to which candidates for NEA Director must also adhere. A copy of NEA's "Campaign and Election Requirements for the Positions of State, Retired, and Student Directors" can be obtained from NEA's Executive Office in Washington, D.C.

CAMPAIGN REGULATIONS FOR CANDIDATES FOR IEA OFFICE IN ELECTIONS HELD AT THE IEA REPRESENTATIVE ASSEMBLY

II. General Campaign Requirements

A. Campaign Period - The campaign period will be defined as the period from the end of the preceding Representative Assembly until such time as the election is certified. However, candidates should note that RA delegates have expressed concern with the length of campaigns.

B. Campaign Revenues and Expenses - IEA Bylaw Article IV, Section 2.E, NEA governing documents and federal law provide that no portion of dues money at local, regional, state, or national level shall be used to promote the candidacy of an individual for an IEA office. Each candidate must file a final report no later than 30 days following certification of the election results.

Although no campaign limitations are in effect, candidates are required to keep records and submit reports of campaign revenues and expenses.

Campaign revenues are defined as financial contributions and goods and/or services in kind made available to the candidate by groups or individuals within or outside the candidate's state.

Campaign expenditures include costs connected with printing material that directly advances the position of the candidate on issues pertaining to the office being sought; mailing of said material; operation of hospitality suites during the campaign year whether such suites are funded by the candidate or by friends within or outside of the candidate's state; other entertainment designed to advance the candidate's campaign; expenditures of the official campaign committee, including travel, lodging, and meals; and giveaways including but not limited to buttons, favors, and so forth.

Campaign expenditures include items used to solicit voluntary contributions. The amount of money spent to purchase any item(s) for a raffle* or similar activity by a candidate for IEA office for the purpose of fundraising must be reported as a campaign expenditure. The amount collected from such activities must be reported as campaign revenue.

It is suggested that candidates note the concern expressed by RA delegates regarding the amount of money that appears to be spent on campaigns, including hospitality suites and giveaways, and the amount of campaign literature that is distributed.

C. Campaign Contributions - No labor organization (including IEA and its affiliates) or employer (including commercial firms and businesses) may contribute money, goods, services, or anything of value, directly or indirectly, to promote the candidacy of any individual for IEA office. Such contributions may be received only from individuals or groups of individuals.

Campaign contributions may not be solicited by a candidate or campaign worker prior to the beginning of the campaign year; however, unsolicited contributions may be accepted prior to the beginning of the campaign year.

* For a raffle to be legal in Illinois, either: 1) it must be operated by a specific qualifying organization which has received a license to operate the raffle; or 2) all individuals who desire to take part in the raffle must be allowed to do so, whether or not they pay for a chance to participate.

CAMPAIGN REGULATIONS FOR CANDIDATES FOR IEA OFFICE IN ELECTIONS HELD AT THE IEA REPRESENTATIVE ASSEMBLY

D. Campaign Activities - Campaign activities include those activities (i.e., speeches, receptions, personal visits, press interviews, and radio and TV appearances) which contribute to the candidate's attempt to persuade the voting constituencies of his or her merits in the pursuit of the office in question. Accordingly, money spent to promote, implement, or publicize any of these activities must be reported as a campaign expenditure.

E. Campaign Materials - Campaign materials are defined as announcements, biographical sketches, brochures, buttons, invitations, pins, position papers, posters, or any objects or printed material bearing the name of the candidate or promoting the candidacy or an individual for IEA office. Any audio-or videotapes, billboards, or newspaper advertisements which may be disseminated to advance the candidate's campaign also fall into the classification of campaign materials. Such campaign materials must carry an identification of source and sponsorship, except that campaign pins and buttons are excluded from this requirement.

The following are not considered campaign materials:

- The candidate statements described in Section V(B) of the Campaign Regulations
- Candidate brochures that comply with the requirements outlined in Section V(D).

Rather, the above items are regarded as vehicles for impartial publication of election information.

Distribution by a candidate or a candidate's designee of campaign materials as defined in this section constitutes a campaign activity, and actual expenses thus incurred must be reported as such.

Neither the IEA logo, NEA logo nor the symbol of the unified education profession may be used by candidates in campaign material or in their displays. However, the IEA may use those symbols in election campaign materials of an informational nature.

III. Role of Regions & Locals in Candidate Election Campaign

A region or local is prohibited from using its name, logo, letterhead, or similar association asset in behalf of the candidacy of any individual.

A region or local may use its resources in a nonpartisan way to provide information about all of the candidates for a particular office. Except as otherwise provided below in this section, a region/local may not use its resources, directly or indirectly, to advance the candidacy of any individual.

A. Endorsement of Candidates

1. In its regular course of business, the membership or governing body of a region/local may endorse a candidate for office. A region or local may not, however, call a meeting for the sole purpose of issuing an endorsement or in any other manner spend any funds for that purpose.

CAMPAIGN REGULATIONS FOR CANDIDATES FOR IEA OFFICE IN ELECTIONS HELD AT THE IEA REPRESENTATIVE ASSEMBLY

2. Once an endorsement has been made, a region/local may not spend funds to publicize the endorsement or to encourage delegates to vote for a particular candidate. If the actions or business of the membership or governing body are regularly published in a newsletter or distributed in some other manner, the local/region may include the action on the endorsement, but this is the only condition under which the region/local may use funds to note the endorsement.
 3. Although the region/local may not use the funds of the organization to publicize or encourage support, the following actions may be taken:
 - a. The candidate may use the endorsement in his/her own literature (e.g., "I have been endorsed by the Delegate Assembly of the _____ Education Association" or "All members of the _____ Education Association Executive Committee have supported my candidacy.").
 - b. An officer of a region/local or any other member or combination of members may use their own money or that of the candidate to encourage support from members or delegates. In a personal letter or any other type of personal communication, an officer may, of course, mention his/her title as a means of persuasion (e.g. "Dear Delegate: I am president of the _____ Education Association and I urge your support for ..."). Such letters shall not be written on the official stationery of the region/local. Officers should also note the concern of some RA delegates regarding pressure to support, campaign or vote for a particular candidate.
 4. A region/local may not require a candidate to visit the local or region as part of the endorsement process.
- B. Association Meetings** - It is permissible for a candidate to sponsor a social or fundraising event that promotes his or her candidacy in conjunction with a meeting of a region/local provided that the candidate or campaign committee is responsible for all costs incurred in connection with the event and that all other candidates for the same position are given an opportunity to sponsor a comparable event in conjunction with the meeting.

IV. Role of Elected Leaders in Candidate Election Campaign

Elected officers at local, state, and national levels retain their rights as members to participate in the affairs of the organization, including supporting and working on behalf of candidates for office. However, such campaign activities may not occur during official association functions and may not involve the expenditure of association funds at any level--local, state, regional, or national. Accordingly, officers may not campaign on time that is paid for by an association. Nor may they use association funds, facilities, equipment, personnel (working on association time), stationery, newsletters, or any other association asset to assist them in campaigning. At the RA, it is suggested that heads of region and constituent delegations should ensure that their delegates have equal access to information about all candidates.

A newsletter that contains the IEA logo, that is paid for by the IEA, and/or that is prepared or distributed by an IEA elected officer in his or her official capacity shall not carry any reference to an election for IEA office unless the reference is a notice of the election or in the nature of a report on an item of business at a meeting of the Board of Directors or other official IEA meeting.

CAMPAIGN REGULATIONS FOR CANDIDATES FOR IEA OFFICE IN ELECTIONS HELD AT THE IEA REPRESENTATIVE ASSEMBLY

V. Campaigning Prior to Representative Assembly

A. Campaign Materials - Distribution by a candidate or designee of written, printed, or other campaign materials within the definition in Section II above constitutes a legitimate campaign activity and actual expenses thus incurred must be reported.

B. Candidate Statements in The Advocate - Candidates for IEA executive office may file their intention in writing with the IEA-NEA Elections Committee, along with a picture and candidate statement. The IEA shall publish in The Advocate the member's picture and candidate statement of each candidate who has filed and presented such statement.

The content of the candidate statement shall be left to the discretion of the candidate provided that it shall comply with requirements set forth in this document, and therefore shall be subject to review by the IEA General Counsel.

C. Candidate Brochures in RA Delegate Packets - IEA will distribute to all IEA RA delegates in the IEA RA delegate packet, a brochure for each candidate for IEA executive office and NEA Director. The candidate may either: 1) print his/her own brochure and provide IEA with a sufficient quantity for distribution to all delegates; or 2) have the IEA Print Shop print the brochure, at the candidate's own expense. The brochure shall be one (1) page and no longer than 8 1/2 x 11 inches.

The candidate shall determine the brochure's content, provided that the brochure's content shall comply with legal requirements and therefore shall be subject to review by the IEA General Counsel. See V(D) below.

The candidate shall submit the proposed brochure to the IEA General Counsel for review according to the prescribed timelines whether the candidate prints his/her brochure, or if the brochure is to be printed at the candidate's expense by IEA.

If the IEA General Counsel, in reviewing a brochure, determines that a statement or some other aspect of the brochure does not meet legal requirements, he/she will notify the candidate and be available to assist the candidate in developing a suitable alternative. If a suitable alternative cannot be developed or the candidate refuses to make appropriate modifications to the brochure, IEA will not distribute the brochure, unless the candidate agrees to pay for its distribution.

D. Content of Materials - When the IEA pays for the production and/or dissemination of materials, it reserves the right to reject any materials that could expose the IEA to legal liability or that are not in the best interests of the Association.

Any material printed and/or distributed by the IEA must be informational in nature. Such materials shall be restricted to factual statements expressing a candidate's views on issues or providing autobiographical information. Statements or messages shall be limited to objective facts. They shall not include subjective statements about candidates, i.e., "I am, I believe I am, or I feel I am trustworthy, hardworking, energetic, dedicated, a demonstrated leader", shall not contain testimonials, and shall not include explicit or implicit references to or comparisons with other candidates or their campaign themes. They may contain factual information on the

CAMPAIGN REGULATIONS FOR CANDIDATES FOR IEA OFFICE IN ELECTIONS HELD AT THE IEA REPRESENTATIVE ASSEMBLY

candidate and the office that he or she is seeking (e.g., "I am a candidate for the office of Vice-President.") but may not include an exhortation to vote for the candidate (e.g., "Elect Pat Doe as Vice-President" or "Vote for Chris Doe.")

Any printed material for which IEA pays production costs, i.e., *The Advocate* statements, must contain some text. It may not consist exclusively of photos or artwork.

All campaign materials (except pins, buttons, and food products) shall carry an identification of source and sponsorship. The following are not considered campaign materials: the candidate statements described in Section V(B) of the Campaign Regulations; candidate brochures that comply with the requirement outline. Rather, the above items are regarded as vehicles for impartial publication of election information.

VI. Campaigning At IEA Functions Other Than Representative Assembly

Campaign activities at an IEA function (meeting, conference, social event, and so forth) must be incidental to the function and must not intrude on the planned program. Campaigning may take place before or after the function and between sessions (e.g., at meal breaks).

For example, a candidate's campaign workers may place campaign materials at the places of participants or observers prior to the opening of the meeting or may distribute campaign material at the entrance of the meeting room. However, it would be impermissible for a campaign worker to distribute campaign material once the meeting has begun or to announce a campaign related activity from the podium during a session of the meeting.

VII. Campaigning by IEA Officials

Frequently, IEA elected or appointed officials who are candidates for office ask what type of campaigning is permissible when they are on assignment for the IEA and are traveling at IEA expense. Such campaigning must be incidental to the assignment and must not interfere with the individual's performance of his or her duties.

For example, if an IEA official who is a candidate for office is assigned to represent the Association at a meeting, it is permissible for the individual to meet with supporters or members of his or her campaign committee in off-duty hours. All expenses incurred in connection with such a meeting are campaign expenses and are not chargeable to the IEA.

A candidate who is traveling at IEA expense may use his or her hotel room for campaign purposes (i.e., a meeting of the campaign committee or a social event) provided he/she reimburses the IEA on a pro rata basis for the time the room was used for such purposes. The amount of the reimbursement is computed as follows: The daily rate is divided by 24 (hours) to arrive at an hourly rate. The hourly rate is then multiplied by the number of hours that the candidate's room was used for campaign purposes. The total amount should be remitted to the IEA or deducted from the individual's expense voucher.

VIII. Campaigning at the Representative Assembly

A. Meeting with IEA Elections Committee - Candidates and/or their campaign managers are expected to meet with the IEA Elections Committee prior to the first business meeting of the Representative Assembly. Candidates who have filed will be notified concerning the time and place of such meeting.

CAMPAIGN REGULATIONS FOR CANDIDATES FOR IEA OFFICE IN ELECTIONS HELD AT THE IEA REPRESENTATIVE ASSEMBLY

B. Campaigning at the Convention Center

1. ***Span of Campaign Activity*** - Campaign activities in the convention center begin with the opening of registration and cease upon certification of final election results.
2. ***Convention Center Rules and Regulations*** - Candidates must adhere to the rules and regulations of the convention center regarding the distribution of materials and the display of posters. The pertinent rules and regulations of the convention center and information regarding the number, dimension, and display of posters will be sent to a candidate upon receipt of the official filing form or as soon thereafter as available.
3. ***Distribution and Display of Materials*** - Items bearing the name or slogan of a candidate, including pins, buttons, or costumes, may be worn, but not distributed or sold, in the seating area of the arena at any time, and may not be worn or displayed in the voting area on any day on which elections are held.

Posters or other materials may not be distributed or posted within the seating area of the arena at any time.

4. ***Disruptive Activities*** - The IEA Elections Committee will halt any campaign activities that (a) impede the business or functions of the Representative Assembly, including exhibits, open hearings, business meetings of the Representative Assembly, registration, and voting, (b) hinder the flow of traffic while those activities are in progress, (c) constitute a safety hazard, or (d) are not within the established guidelines.
5. ***Removal of Materials*** - Candidates shall remove their campaign materials from the convention center no later than the end of the final business session of the Representative Assembly .
6. ***“Gauntlet”*** – It is suggested that candidates note the concern expressed by RA delegates about the number of candidate campaign workers that fill the Convention Center hallway leading to the exhibits and the business meeting room.

C. Campaigning at Hotel - Candidates must adhere to the rules and regulations of the hotel regarding the distribution of materials and the display of posters. The IEA will send each candidate a copy of the relevant rules and regulations of the hotel.

NEA RA STATE DELEGATES AT LARGE

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Prior to February 1 - Notification of open positions, election procedures and nomination forms will be placed in the December/January ADVOCATE. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Deadline for receipt of nominations on official form by electronic submission or CERTIFIED MAIL, including candidate's statement.
- ◆ Four weeks prior to Ballot Mail Date - Sample ballot and biographies sent to all candidates and Region Chairs.
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - (BALLOT MAIL DATE) All ballots and candidates' biographies bulk mailed to membership.
- ◆ Wednesday of last full week of April - (BALLOT RETURN DATE) Last date for ballots to be received at IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation at IEA-NEA headquarters.
- ◆ Within One Week of the Tally Date - Notify all candidates of results.

NEA RA STATE DELEGATES AT LARGE

NOMINATION AND ELECTION PROCEDURES

Members of the Board of Directors who serve as state delegates are indicated by Article VIII, Section 3, of the IEA-NEA Bylaws.

The Bylaws of the Association require IEA-NEA State Delegates to the NEA RA to be elected by open nomination and secret ballot. All active IEA-NEA members are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1 - NOMINATIONS - All IEA-NEA members will be notified in the December-January ADVOCATE that open nominations will be accepted. Nominations must consist of the name, contact information and membership identification number. They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. (*Form in Forms Section of this Handbook.*)

Section 2. - NOTIFICATION - The candidates will be sent notice in writing (sample ballot and biographies) of those running.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and bulk mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the date they are to be returned. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 5. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each delegate shall be elected by a plurality of valid votes cast, providing there are open nominations and voting is by secret ballot. However, in an election of an individual to serve both as a local, region, or state officer and as an NEA RA delegate, the delegate shall be elected by the vote required to determine the results of the officer election. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 6. - RESULTS - Candidates will receive the results of their election status within one week of tabulation. Verified results of the election shall be provided to the Board of Directors prior to the May Board meeting.

Section 7. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

LOCAL DELEGATES TO NEA RA

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ September Regional Council Meeting - Regional Elections Committee Elected or Appointed.
- ◆ Prior to the October State Elections Committee Meeting - Regional Council establishes an election date that falls within the dates designated on the IEA-NEA Elections Calendar. The Regional Council must electronically submit the election plan to the State Elections Committee. (*Worksheet in Forms Section of this Handbook.*)
- ◆ October State Elections Committee Meeting - State Elections Committee reviews plans.
- ◆ One week after October State Elections Committee Meeting - Approved or rejected Plans returned to regions.
- ◆ Membership as of January 15 determines delegate allocation by NEA. Membership figures used for delegate allocation are provided to region chairs. Region chairs are notified of delegate entitlement the first week of February.
- ◆ Delegates will be allocated in the ratio of one delegate for each 150 NEA Active members or major fraction thereof. (For further information, see NEA publication *Requirements for the Allocation and Election of Delegates to the Representative Assembly*.)
- ◆ December/January issue of the ADVOCATE mailed to members with dates, times and places of elections to be held.
- ◆ At least three (3) weeks prior to the election date - Nominations received by Regional Elections Committee.
- ◆ At least fifteen (15) days prior to date ballots must be received in order to be counted - Post mail ballots.
- ◆ On published election date - Conduct the election.
- ◆ Within one week of election - Tabulation of ballots.
- ◆ If necessary, runoff elections shall be held in the same manner as the original election.
- ◆ Within one week of tabulation - Election report sent to all candidates, local association presidents and the President of IEA-NEA.
- ◆ Next Regional Council Meeting - Verified results submitted.

LOCAL DELEGATES TO NEA RA

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require delegates to the NEA RA to be elected by open nomination and secret ballot. All active members of the region are entitled to seek the office, nominate and vote. The Regional Council shall elect or appoint a Regional Council Elections Committee of no fewer than three (3) active members of the region, none of whom shall be a candidate. This Committee shall elect its own Chairperson. While the Committee has exclusive responsibility for conducting the election in compliance with the elections procedures which follow, the Regional Council may vote to delegate this responsibility to the Elections Committee of a non-clustered local. Hereinafter, the Regional Council Elections Committee, or its designee, shall be referred to as "the Committee".

Section 1. - PARTICIPATION IN THE ELECTION PROCEDURE - No candidate in the election may participate in any way in the operational procedure of the election.

Section 2. - ESTABLISHMENT OF THE ELECTION DATE - Prior to the October State Elections Committee Meeting - The Committee establishes, with the approval of the Regional Council, an election date. Regional Council must electronically submit its Election Plan to the State Elections Committee for approval. (*Worksheet in Forms Section of this Handbook.*)

Section 3. - NOMINATION - At least six (6) weeks prior to the election date, notice of nominations must be distributed in any manner reasonably calculated to reach all members in sufficient time to permit members to nominate the candidates of their choice. Members may nominate themselves. The nomination forms shall minimally include the name of the nominee and local, the name of the nominator and local, and the written consent of the nominee. Nominating forms shall be received by the Committee at least three (3) weeks prior to the election date. In the event that no nominations are received, the Committee will seek out a candidate.

Section 4. - NOTIFICATION - Notice of election must be mailed to each member at his/her last known address no later than fifteen (15) days prior to the election. (The day the notice is mailed is not counted, but the day of the election is counted.) The ADVOCATE will publish in the December/January issue, election plans that have been approved by the State Elections Committee at their October meeting. The Regional Council, all local presidents and all candidates will be notified in writing of the names of all those running for NEA delegates. The Committee may choose an appropriate method of disseminating information regarding the qualification of candidates; however, no dues money may be used to promote one candidate over another.

Section 5. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the Committee.

Section 6. - ELECTION - The election shall be conducted on the date published. If not, notice of the change must be mailed to each member at his/her last known address no later than fifteen (15) days prior to the election. The Committee is responsible for the preparation, distribution, collection, tabulation and storing of the ballots and related election materials. The Committee shall determine the position of candidates on the ballot by lot. Provisions for write-in votes are required. The Committee shall not allow proxy voting. The ballot must minimally include office to be filled, candidates' names, number to vote for, and provisions for write-in candidates.

The Committee shall post any ballots mailed to individual members no later than fifteen (15) days prior to the date when they must be received back in order to be counted. These mail ballots must include instructions for voting and returning the ballots. A double envelope method is required and a form of voter identification must appear on the outer return envelope. All mail ballots must be returned to a Post Office Box and shall be picked up only by a member of the Elections Committee or a designee appointed by the Chairman.

LOCAL DELEGATES TO NEA RA

For ballots voted in the locals, the Committee will require a pre-printed signature roster to ensure only eligible voters voted and to certify the numbers of valid votes cast. Ballots shall be distributed in such a manner as to ensure all eligible members are provided a reasonable opportunity to vote, that the secrecy of their ballot is ensured, and that a record of those voting is maintained. Ballots may not be placed in mail boxes. A manned polling place or a system of personally contacting each voter must be established. The overriding principle to govern every decision of the Committee is to ensure that each active member is best able to exercise his/her rights and privileges in the election process. To that end, the Committee will choose the means of distribution and collection of ballots which maximizes the probability that each member may vote in the election and that voted ballots are secured at all times.

Section 7. - TABULATION - Within seven (7) days following the election date, the Committee shall count the ballots and tabulate the results in accordance with state and federal requirements. Each delegate shall be elected by a plurality of valid votes cast, providing there are open nominations and voting is by secret ballot. However, in an election of an individual to serve both as a local, region or state officer and as an NEA RA delegate, the delegate shall be elected by the vote required to determine the results of the officer election. Phone tallies are not permitted. Voted ballots shall be counted as long as the intention of the voter can be clearly determined. Each candidate shall be notified as to the date, time and location of the tally. Candidates or their designees may be present as poll watchers. Ballots, including used, unused, challenged ballots, envelopes used to return ballots in a mail ballot election, tally sheets, roster/signature sheets, and all related election documents must be sealed and kept for one year.

Section 8. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in the same manner as the original election. The timeline will begin on the date of the tabulation of the original election and the runoff election will be held on the date published in the region's election plan.

Section 9. - REPORTING - The Committee shall prepare a report of the election results to be disseminated. Said report shall minimally include the total number of valid ballots cast, the number of votes for each candidate, the number of write-in votes, the number of spoiled ballots, and a declaration of a winner(s). The report shall be sent to all candidates and local association presidents, within one week of the tally date and submitted to the Regional Council at its next meeting. Local Association Presidents shall promptly post the election results in the locals.

Section 10. - CREDENTIAL REPORTING FORMS - Locals with one hundred fifty (150) members or major fraction thereof receive credential reporting forms directly from NEA. Locals with fewer than seventy-six(76) members are clustered with other small chartered locals. The Region Chairperson submits cluster local delegate names to the IEA-NEA President on the form provided by NEA.

Section 11. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

LOCAL DELEGATES TO NEA RA

CLUSTERING

- I. Locals with 150 members or major fraction thereof receive credential reporting forms directly from NEA. These locals must conduct the election according to the published date, time and place of their region.
- II. Locals with fewer than 76 members may cluster with other small chartered locals to form a cluster with at least 150 members or major fraction thereof.
- III. The cluster plans of locals within a single region must be approved by the Regional Council prior to the election. Clustered local elections must be held in accordance with published timelines.
- IV. Results of local and cluster elections must be submitted to IEA-NEA President's Office by the date listed on the Elections Calendar. Reporting forms are available from the IEA-NEA President's Office.

****LOCALS WITH 76 OR MORE MEMBERS MAY NOT BE CLUSTERED****

NEA RA RETIRED MEMBER DELEGATES AT LARGE

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Membership as of January 15 shall determine the number of delegates. The ratio shall be one delegate for the first 50 members and one delegate for each 1000 members thereafter.
- ◆ The third week in February NEA will contact the IEA-NEA President's Office as to the number of delegates.
- ◆ December/January ADVOCATE - Notification of open positions, election procedures and nomination forms. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots and candidates' biographies will be mailed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

NEA RA RETIRED MEMBER DELEGATES AT LARGE

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require IEA-NEA Retired Delegates to the NEA RA to be elected by open nomination and secret ballot. All IEA-NEA Retired members are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1 - NOMINATIONS - All IEA-NEA Retired members will be notified in the December/January ADVOCATE that open nominations will be accepted. Nominations must consist of the name, contact information and membership identification number. They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Section of this Handbook.)*

Section 2. - NOTIFICATION - The candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. - UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. Write-in candidates are not permitted.

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each delegate shall be elected by a plurality of valid votes cast, providing there are open nominations and voting is by secret ballot. However, in an election of an individual to serve both as a local, region, or state officer and as an NEA RA delegate, the delegate shall be elected by the vote required to determine the results of the officer election. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. Write-in candidates are not permitted.

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of tabulation. Verified results of the election shall be provided to the Board of Directors prior to the May Board Meeting.

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

NEA RA STUDENT MEMBER DELEGATES AT LARGE

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Membership as of March 15 shall determine the number of delegates. The ratio shall be one delegate for the first 50 student members, a second delegate when student membership reaches seven hundred fifty (750) and an additional delegate for each five hundred (500) student members thereafter.
- ◆ December/January ADVOCATE - Notification of open positions, election procedures and nomination forms. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or
- ◆ CERTIFIED MAIL at IEA-NEA headquarters. (*Form in Forms Section of this Handbook.*)
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots and candidates' biographies will be mailed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

NEA RA STUDENT MEMBER DELEGATES AT LARGE

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require IEA-NEA Student Delegates to the NEA RA to be elected by open nomination and secret ballot. All IEA-NEA Student members are entitled to vote. Only student members who are enrolled for a minimum of 12 semester hours may be elected to positions representing student members. Following are the procedures which shall be met to comply with this requirement.

Section 1 - NOMINATIONS - All IEA-NEA Student members will be notified in the December/January ADVOCATE that open nominations will be accepted. Nominations must consist of the name, contact information and membership identification number. They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. (*Form in Forms Section of this Handbook.*)

Section 2. - NOTIFICATION - The candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. - UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. **Write-in candidates are not permitted.**

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each delegate shall be elected by a plurality of valid votes cast, providing there are open nominations and voting is by secret ballot. However, in an election of an individual to serve both as a local, region, or state officer and as an NEA RA delegate, the delegate shall be elected by the vote required to determine the results of the officer election. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of the tally date. Verified results of the election shall be provided to the Board of Directors prior to the May Board Meeting.

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

NEA RA DELEGATE POLICIES

IEA AND NEA RA DELEGATE EXPENSES REIMBURSEMENT POLICY

The IEA, region councils and local associations may provide funds to advance and/or reimburse RA delegates for expenses incurred in attending the IEA and/or NEA RA. The amount of such delegate funding shall be annually established. To receive reimbursement from delegate funds for expenses incurred or to claim expenses incurred against any advance from such funds, a delegate must properly substantiate expenses, noting the amount, time, place and description of expenses, including receipts for all expenses above \$10, and submit such substantiation on the form designated by the provider of the funds, no later than 60 days after expenses are incurred. Any expenses not properly substantiated shall not be reimbursed or credited. If the delegate has already received an advance to cover such expenses, the delegate must return the amount of such advance not used to pay for properly substantiated expenses. If the delegate does not do so: 1) such unreturned amounts shall be included on an IRS Form 1099 issued to the delegate; 2) disciplinary proceedings may be initiated against the delegate before the IEA Review Board; 3) court proceedings may be initiated to collect the excess amounts; and 4) the delegate may be denied future delegate funding.

IEA AND NEA RA DELEGATE ACCOUNTABILITY POLICY

It is the responsibility of IEA members elected to serve as delegates to the IEA and/or NEA RA to attend all business sessions of the RA, delegation caucuses and briefings, and other required RA business-related meeting(s), as the delegate may be reasonably informed of prior to the required meeting(s). Failure to meet any of these responsibilities, unless excused by the region chair or designee for an IEA RA or NEA RA local delegate, or by the IEA President or designee for an NEA RA state delegate, shall result in the delegate's advance and/or reimbursement for expenses being proportionally reduced. If the delegate has already received an unreduced advance and/or reimbursement, he/she must return any excess amounts. If the delegate does not do so: 1) such unreturned amounts shall be included on an IRS Form 1099 issued to the delegate; 2) disciplinary proceedings may be initiated against the delegate before the IEA Review Board; 3) court proceedings may be initiated to collect the excess amounts; and 4) the delegate may be denied future delegate funding.

EDUCATIONAL SUPPORT PROFESSIONAL COUNCIL

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Prior to first Monday in November - ESP Council will notify the State Elections Committee of vacancies and terms.
- ◆ December/January ADVOCATE will notify all members of open positions, election procedures and nomination forms. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots and candidates' biographies will be mailed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

EDUCATIONAL SUPPORT PROFESSIONAL COUNCIL

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require Educational Support Professional Council members to be elected by open nomination and secret ballot. All active Educational Support Professional members are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1. - NOMINATIONS - All Educational Support Professional members will be notified in the December/January ADVOCATE that open nominations will be accepted. Nominations must consist of the name, contact information, membership identification number and position sought on the council (chairperson, vice-chairperson or council member). They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballot. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Sections of this Handbook.)*

Section 2. - NOTIFICATION - The Educational Support Professional Council Chair and all candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. Write-in candidates are not permitted.

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. Write-in candidates are not permitted.

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of the tally date. Verified results of the election shall be provided to the Board of Directors prior to the May Board meeting. For Chairperson and Vice-Chairperson, a Certificate of Election of IEA Board Member/Alternate shall be filed with the President's Office. *(Form in Forms Section of this Handbook).*

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

**EDUCATIONAL SUPPORT PROFESSIONAL SECTIONAL REP.
(NEA RA STATE DEL.)
EDUCATIONAL SUPPORT PROFESSIONAL SECTIONAL ALT.
(NEA RA SUCCESSOR DEL.)**

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Prior to the first Monday in November - President of the State Association will notify IEA-NEA Elections Committee of vacancies and terms.
- ◆ December/January ADVOCATE will notify all members of open positions, election procedures and nomination forms. All Region Chairs of the Sections that have vacancies will be sent written notice of same. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots distributed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

**EDUCATIONAL SUPPORT PROFESSIONAL SECTIONAL REP.
(NEA RA STATE DEL.)
EDUCATIONAL SUPPORT PROFESSIONAL SECTIONAL ALT.
(NEA RA SUCCESSOR DEL.)**

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require Educational Support Professional Sectional Representatives and Alternates to the Board of Directors to be elected by open nomination and secret ballot. All active members of the section are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1. - NOMINATION - All members within the section will be notified in December/January ADVOCATE that open nominations will be accepted. The Regional Chairs in the sections with vacancies will receive written notice. Nominations must consist of the name, contact information, membership identification number, and position sought on the council (Representative or Alternate). They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Section of this Handbook.)*

Section 2. - NOTIFICATION - The Regional Chairs and all candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704

Section 4. - UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. **Write-in candidates are not permitted.**

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of the tally date. Verified results of the election shall be provided to the Board of Directors prior to the May Board meeting. A Certificate of Election of IEA Board Member/Alternate shall be filed with the President's Office. *(Form in Forms Section of this Handbook.)*

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

HIGHER EDUCATION COUNCIL

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Prior to first Monday in November - Higher Education Council will notify the State Elections Committee of vacancies and terms.
- ◆ December/January ADVOCATE will notify all members of open positions, election procedures and nomination forms. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots and candidates' biographies will be mailed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

HIGHER EDUCATION COUNCIL

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require Higher Education Council members to be elected by open nomination and secret ballot. All active Higher Education members are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1. - NOMINATIONS - All Higher Education members will be notified in the December/January ADVOCATE that open nominations will be accepted. Nominations must consist of the name, contact information, membership identification number and position sought on the council (chairperson, vice-chairperson or council member). They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Section of this Handbook.)*

Section 2. - NOTIFICATION - The Higher Education Council Chair and all candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. Write-in candidates are not permitted.

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. Write-in candidates are not permitted.

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of the tally date. Verified results of the election shall be provided to the Board of Directors prior to the May Board meeting. For Chairperson and Vice-Chairperson, a Certificate of Election of IEA Board Member/Alternate shall be filed with the President's Office. *(Form in Forms Section of this Handbook).*

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

HIGHER EDUCATION SECTIONAL REP. (NEA RA STATE DEL.) HIGHER EDUCATION SECTIONAL ALT. (NEA RA SUCCESSOR DEL.)

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Prior to the first Monday in November - President of the State Association will notify IEA-NEA Elections Committee of vacancies and terms.
- ◆ December/January ADVOCATE will notify all members of open positions, election procedures and nomination forms. All Region Chairs of the Sections that have vacancies will be sent written notice of same. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots and candidates' biographies will be mailed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

HIGHER EDUCATION SECTIONAL REP. (NEA RA STATE DEL.) HIGHER EDUCATION SECTIONAL ALT. (NEA RA SUCCESSOR DEL.)

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require Higher Education Sectional Representatives and Alternates to the Board of Directors to be elected by open nomination and secret ballot. All active members of the section are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1. - NOMINATION - All members within the section will be notified in December/January ADVOCATE that open nominations will be accepted. The Regional Chairs in the sections with vacancies will receive written notice. Nominations must consist of the name, contact information, membership identification number, and position sought on the council (Representative or Alternate). They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. (*Form in Forms Section of this Handbook.*)

Section 2. - NOTIFICATION - The Regional Chairs and all candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704

Section 4. - UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. **Write-in candidates are not permitted.**

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of the tally date. Verified results of the election shall be provided to the Board of Directors prior to the May Board meeting. A Certificate of Election of IEA Board Member/Alternate shall be filed with the President's Office. (*Form in Forms Section of this Handbook.*)

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

RETIRED COUNCIL

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Prior to first Monday in November - Retired Council will notify the State Elections Committee of vacancies and terms.
- ◆ December/January ADVOCATE will notify all members of open positions, election procedures and nomination forms. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots and candidates' biographies will be mailed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

RETIRED COUNCIL

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require Retired Council members to be elected by open nomination and secret ballot. All IEA Retired members are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1. - NOMINATIONS - All IEA Retired members will be notified in the December/January ADVOCATE that open nominations will be accepted. Nominations must consist of the name, contact information, membership identification number and position sought on the council (chairperson, vice-chairperson or council member). They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *(Form in Forms Section of this Handbook.)*

Section 2. - NOTIFICATION - The Retired Council Chair and all candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704.

Section 4. UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. **Write-in candidates are not permitted.**

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the final receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of the tally date. Verified results of the election shall be provided to the Board of Directors prior to the May Board meeting. For Chairperson and Vice-Chairperson, a Certificate of Election of IEA Board Member/Alternate shall be filed with the President's Office. *(Form in Forms Section of this Handbook.)*

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

ETHNIC MINORITY REPRESENTATIVE (NEA RA STATE DELEGATE) ETHNIC MINORITY ALTERNATE (NEA RA SUCCESSOR DELEGATE)

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ Prior to the first Monday in November - President of the State Association will notify IEA-NEA Elections Committee of vacancies and terms.
- ◆ December/January ADVOCATE will notify all members of open positions, election procedures and nomination forms. All Region Chairs of the Sections that have vacancies will be sent written notice of same. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ Five weeks prior to Ballot Mail Date - Open nominations received by electronic submission or CERTIFIED MAIL at IEA-NEA headquarters.
- ◆ Four weeks prior to Ballot Mail Date - Notify candidates of those running (sample ballots and biographies).
- ◆ Two weeks prior to Ballot Mail Date - All challenges must be received.
- ◆ Four weeks prior to Ballot Return Date - Ballots and candidates' biographies will be mailed.
- ◆ Wednesday of last full week of April - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ First Friday after Ballot Return Date - Tabulation of ballots.
- ◆ Within One Week of the Tally Date - Verified results sent to all candidates.
- ◆ Two weeks after the Tabulation of Ballots Date - Run-off ballots mailed, if necessary.
- ◆ Wednesday before Run-off Tabulation Date - Ballots must be received in IEA-NEA headquarters in the Official Ballot Envelope with name and return address.
- ◆ Six weeks after original Tabulation of Ballots Date - Run-off Ballots counted.

ETHNIC MINORITY REPRESENTATIVE (NEA RA STATE DELEGATE) ETHNIC MINORITY ALTERNATE (NEA RA SUCCESSOR DELEGATE)

NOMINATION AND ELECTION PROCEDURES

The Bylaws of the Association require Ethnic Minority Representatives and Alternates to the Board of Directors to be elected by open nomination and secret ballot. All active members of the section are entitled to vote. Following are the procedures which shall be met to comply with this requirement.

Section 1. - NOMINATION - All members within the section will be notified in December/January ADVOCATE that open nominations will be accepted. The Regional Chairs in the sections with vacancies will receive written notice. Nominations must consist of the name, contact information, membership identification number, and position sought on the council (Representative or Alternate). They must be sent to the IEA-NEA President's Office by certified mail, any other delivery service in which a receipt is issued, or links to electronic nomination forms may be found on the IEA website (www.ieanea.org/about/elections). Members may nominate themselves. A candidate statement of no more than 100 characters may be submitted by the nominee to be mailed out with the ballots. (Statements must not include an exhortation to vote for the candidate and must be nonpromotional, factual and objective. *Form in Forms Section of this Handbook*.)

Section 2. - NOTIFICATION - The Regional Chairs and all candidates will be sent notice (sample ballot and biographies) of those running for office.

Section 3. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the State Elections Committee, c/o IEA-NEA Headquarters, 100 E. Edwards, Springfield, IL 62704

Section 4. - UNCONTESTED ELECTIONS - If the number of candidates equals the number of positions available in elections conducted by mail by the State Elections Committee, the chair shall declare the candidate(s) elected. **Write-in candidates are not permitted.**

Section 5. - DISTRIBUTION OF BALLOTS - The State Elections Committee will ensure the proper typing, printing and mailing/distribution of all materials and ballots. The placement order of candidates on the ballot shall be determined by a lot drawing. Ballots will be bulk mailed at least four weeks prior to the Ballot Return Date. A double envelope system will be used to protect members' voting rights. Ballots must be returned to the IEA-NEA headquarters by the Wednesday of the last full week of April in the Official Ballot Envelope with name and return address.

Section 6. - TABULATION - On the first Friday following the receipt day, the State Elections Committee will tabulate ballots in accordance with state and federal requirements. Each candidate shall be notified of the date and time of tabulation. Each candidate may have a poll watcher present at the tabulation. **Write-in candidates are not permitted.**

Section 7. - RUNOFF ELECTION - If necessary, the Committee will conduct the runoff election in accordance with the dates published in the December/January issue of the ADVOCATE.

Section 8. - RESULTS - Candidates will receive the results of their election status within one week of the tally date. Verified results of the election shall be provided to the Board of Directors prior to the May Board meeting. A Certificate of Election of IEA Board Member/Alternate shall be filed with the President's Office. (*Form in Forms Section of this Handbook*).

Section 9. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

REGION CHAIR (NEA RA STATE DELEGATE) REGION VICE-CHAIR (NEA RA SUCCESSOR DELEGATE)

TIMELINES

Review "GUIDELINES FOR ALL ELECTIONS" on Page 2 of this Handbook

- ◆ September Regional Council Meeting - Regional Elections Committee Elected or Appointed.
- ◆ Prior to the October State Elections Committee Meeting - Regional Council establishes an election date between March 1 and the Thursday three weeks prior to the May Board Meeting. The Regional Council must notify the State Elections Committee of the Election Plan. *(Worksheet in Forms Section of this Handbook.)*
- ◆ October State Elections Committee Meeting - State Elections Committee reviews plans.
- ◆ One week after October State Elections Committee Meeting - Approved or rejected Plans returned to regions.
- ◆ December/January issue of the ADVOCATE mailed to members with dates, times and places of elections to be held. **The ADVOCATE notice is the official notice to IEA-NEA members who wish to participate in IEA-NEA elections.**
- ◆ At least six (6) weeks prior to election date - Notice of the vacancy or vacancies and nominating forms sent to all local association presidents and to members in non-chartered locals for distribution.
- ◆ At least two (2) weeks prior to election date - Notify the Regional Council and all candidates of the names of candidates.
- ◆ At least fifteen (15) days prior to date ballots must be received in order to be counted - Post mail ballots.
- ◆ Published election date - Conduct the election.
- ◆ Within one week of Election - Tabulation of ballots.
- ◆ Begin timeline for runoff election, if necessary.
- ◆ Within one week of tabulation - Election report sent to all candidates, local association presidents and the President of IEA-NEA.
- ◆ Next Regional Council Meeting - Verified results submitted.
- ◆ One week prior to May Board of Directors meeting, submit Certificate of Election of IEA-NEA Board Member form to the President's Office of IEA-NEA. *(Form in Forms Section of this Handbook.)*

REGION CHAIR (NEA RA STATE DELEGATE) REGION VICE-CHAIR (NEA RA SUCCESSOR DELEGATE)

NOMINATION AND ELECTION PROCEDURES

Bylaws of the Association require regional chairpersons and vice-chairpersons be elected by open nomination, secret ballot and majority vote. All active members of a local or employed within the region are entitled to seek the office, nominate and vote. The Regional Council shall elect or appoint a Regional Council Elections Committee of no fewer than three (3) active members of the region, none of whom shall be a candidate. This Committee shall elect its own Chairperson. The Committee has the exclusive responsibility for conducting the election in compliance with the elections procedures which follow. Hereinafter the Regional Council Elections Committee shall be referred to as "the Committee".

Section 1. - PARTICIPATION IN THE ELECTION PROCEDURE - No candidate in the election may participate in any way in the operational procedure of the election.

Section 2. - ESTABLISHMENT OF THE ELECTION DATE - Prior to the October State Elections Committee Meeting - The Committee establishes, with the approval of the Regional Council, an election date between March 1 and the Thursday three (3) weeks prior to the May Board Meeting. The Regional Council must submit its Election Plan to the State Elections Committee for approval. *(Worksheet in Forms Section of this Handbook.)*

Section 3. NOMINATION - At least six (6) weeks prior to election date, notice of nominations must be distributed in any manner reasonably calculated to reach all members in sufficient time to permit members to nominate the candidates of their choice. Members may nominate themselves. The nomination forms shall minimally include the name of the nominee and local, the name of the nominator and local, and the written consent of the nominee. Nominating forms shall be received by the Committee three (3) weeks prior to the election date. In the event that no nominations are received, the Committee will seek out a candidate(s). The nomination form title must be "Region Chair (NEA RA State Delegate)" and "Vice-Chair (NEA RA Successor Delegate)".

Section 4. - NOTIFICATION - Two (2) weeks prior to the election date, the Committee shall notify the Regional Council and all candidates of the names of all the candidates. Notice of election must be mailed to each member at his/her last known address no later than fifteen (15) days prior to the election. (The day the notice is mailed is not counted, but the day of the election is counted.) Information regarding runoff timelines shall be included. The ADVOCATE will publish in the December/January issue election plans that have been approved by the State Elections Committee prior to publication deadlines. The Committee may choose an appropriate method of disseminating information regarding the qualification of candidates; however, no dues money may be used to promote one candidate over another.

Section 5. - WITHDRAWAL - A candidate may withdraw his/her name at any time prior to the printing of the ballot by sending a letter of withdrawal to the Chairperson of the Committee.

Section 6. - ELECTION - The election shall be conducted on the date published. If not, notice of the change must be mailed to each member at his/her last known address no later than fifteen (15) days prior to the election. The Committee is responsible for the preparation, distribution, collection, tabulation, reporting and storing of the ballots and related election materials. The Committee shall determine the position of candidates on the ballot by lot. Provisions for write-in votes are required. The Committee shall not allow proxy voting. The ballot must minimally include office to be filled: "Region Chair (NEA RA State Delegate)" and "Vice-Chair (NEA RA Successor Delegate)", candidates' names, number to vote for, and provision for write-in candidates.

REGION CHAIR (NEA RA STATE DELEGATE) REGION VICE-CHAIR (NEA RA SUCCESSOR DELEGATE)

The Committee shall post any ballots mailed to individual members no later than fifteen (15) days prior to the date when they must be received back in order to be counted. These mail ballots must include instructions for voting and returning the ballots. A double envelope method is required and a form of voter identification must appear on the outer return envelope. All mail ballots must be returned to a Post Office Box and shall be picked up only by a member of the Elections Committee or a designee appointed by the Chairperson.

For ballots voted in the locals, the Committee will require a pre-printed signature roster system to ensure only eligible voters voted and to certify the numbers of valid votes cast. Ballots shall be distributed in such a manner as to ensure all eligible members are provided a reasonable opportunity to vote, that the secrecy of their ballot is ensured, and that a record of those voting is maintained. Ballots may not be placed in mail boxes. A manned polling place or a system of personally contacting each voter must be established. Candidates have the right to have observers present at all polling places. The overriding principle to govern every decision of the Committee is to ensure that each active member is best able to exercise his/her rights and privileges in the election process. To that end, the Committee will choose the means of distribution and collection of ballots which maximizes the probability that each member may vote in the election and that voted ballots are secured at all times. Members of regions who have not received an official ballot must notify the chairperson of the Elections Committee.

Section 7. - TABULATION - Within seven (7) days following the election date, the Committee shall count the ballots and tabulate the results. Voted ballots shall be counted as long as the intention of the voter can be clearly determined. Each candidate shall be notified as to the date, time, and location of the tally. Candidates or their designees may be present as poll watchers. Ballots, including used, unused and challenged ballots, envelopes used to return ballots in a mail ballot election, tally sheets, roster/signature sheets, and all related election documents must be sealed and kept for one year.

Section 8. - RUNOFF ELECTION - If no candidate received a majority of the valid votes cast, a runoff election will be held between the two candidates receiving the greatest number of votes. The Committee will conduct the runoff election in the same manner as the original election. The timeline will begin on the date of the tabulation of the original election and the runoff election will be held on the date published in the region's election plan.

Section 9. - REPORTING - The Committee shall prepare a report of the election results to be disseminated. Said report shall minimally include the total number of valid ballots cast, the number of votes for each candidate, the number of write-in votes, the number of spoiled ballots, and a declaration of a winner. One candidate must secure a majority of the valid votes cast to be declared elected. The report shall be sent to all candidates, all local association presidents, and the President of IEA-NEA within one week of the tally date and submitted to the Regional Council at its next meeting. Local Association Presidents shall promptly post the election results in the locals. A Certificate of Election of IEA-NEA Board Member form must be filled out by the Elections Committee Chairperson and submitted to the IEA-NEA President's Office. (*Forms in Forms Section of this Handbook.*)

Section 10. - CHALLENGE - Any member(s) desiring to challenge the conduct of the election shall file a written challenge in compliance with Article IV, Section 3, of the IEA-NEA Bylaws.

Section 11. - SPECIAL ELECTIONS TO FILL UNEXPIRED TERMS - In the event of a vacancy in the office of Chairperson, the Vice Chairperson shall serve the remainder of the term. A vacancy in the office of Vice Chairperson may be temporarily filled by a majority vote of the Regional Council for a period of time not to exceed one year. (For such cases in Single Local Regions, see IEA-NEA Bylaws, Article XII, Section C.3.b.)

Section 12. - WAIVER OF TIMELINES - A Regional Council may petition the Board of Directors for a waiver of the timelines where extenuating circumstances exist. Such waiver may be granted by two-thirds vote of the Board of Directors.

AT-LARGE ETHNIC MINORITY REGION COUNCIL REPRESENTATIVE(S)

ELECTION PROCEDURES

IEA-NEA Bylaw Article XII, Constituent Divisions, Section 2.b.1.e, Regional Council Composition, states, "In all Regions, whenever Ethnic Minority representatives are employed within a Region, that Region will ensure that there will be Ethnic Minority representation on the Regional Council at least in proportion to the Ethnic Minority membership within the Region, but in no case less than one (1) representative." The term of office for such Regional Council positions is three (3) years.

Should an election be required to comply with this Bylaw, the timelines, nomination and election procedures shall be the same as those for Region Chair and Vice Chair which can be found on pages 50-52 of this Handbook.

LOCAL ELECTIONS

LOCAL ELECTION PROCEDURES

Before setting any election procedure in place, be sure to check your local, region, state and national bylaws, as well as any other governing documents.

Local bylaws should be consistent with the region, state and national bylaws.

All local elections, including for delegates to the IEA and NEA Representative Assemblies, must be held with open nominations and a secret ballot.

For sample bylaw language, see the “Model Bylaws” document. (Available through IEA Legal Department)

Elections conducted by locals with dates established by the locals:

- **Local Officers**
- **Local Building/Association Representative (may also be appointed)**
- **Regional Council Representatives**

Other elections conducted by locals, but driven by region timelines:

- **IEA RA Local Delegates, and Regional Ethnic Minority delegate-at-large**
- **NEA RA Local Delegates**
- **Region Chair/Vice Chair positions and Regional Council Ethnic Minority Representatives**

Fair Share and Reserve members are not eligible to participate in the election process.

Candidates running for election to an office should not be involved in that particular office’s election process, such as placement of names on ballots or tallying.

No dues or other Association assets may be used in support of a candidate for any local, regional, state or national office.

- Any material printed and/or distributed by the IEA or an IEA affiliate must be informational in nature. Such materials shall be restricted to factual statements expressing a candidate’s views on issues or providing autobiographical information. Statements or messages shall be limited to objective facts. They shall not include subjective statements about candidates, shall not contain testimonials, and shall not include explicit or implicit references to or comparisons with other candidates or their campaign themes. They may contain factual information on the candidate and the office that he or she is seeking.
- Campaign activities at an IEA function (meeting, conference, social event, and so forth) must be incidental to the function and must not intrude on the planned program. Campaigning may take place before or after the function and between sessions (e.g. at meal breaks). An elected or appointed official at any association level when on assignment for the association and/or traveling at the association’s expense, while also a candidate for another position, may campaign as long as such campaigning is incidental to the assignment and does not interfere with the individual’s performance of his or her duties.
- An elected or appointed official at any association level when on assignment for the association and/or traveling at the association’s expense, while also a candidate for another position, may campaign as long as such campaigning is incidental to the assignment and does not interfere with the individual’s performance of his or her duties.

LOCAL ELECTIONS

Notice – Those offices that also serve on the state or national level must comply with a fifteen (15) day notice requirement. For other local offices, there must be reasonable written notice, unless otherwise specified by region, state or national governing documents. Be sure to provide for runoff notice and emergency school closing procedures at the same time as the notice for the original election.

Nominations Procedure – Make sure that everyone has reasonable opportunity to nominate or be nominated for a position. Email nominations may be accepted at the local's/region's option, if provided for in writing in the local's/region's governing documents. Verify that all those nominated are actually willing to serve in that capacity.

If the number of nominations equals the number of positions available, you may declare that election, provided you have made provisions for doing so in your Bylaws. Be sure to check the region, state and national bylaws before doing so. **(This does not apply to elections for local delegates to the IEA or NEA Representative Assemblies.)**

Ballots – Positioning of the names on the ballot must be determined by a lot drawing. A write-in provision is required if the number of declared candidates is less than the number of positions available. The ballot must minimally include office(s) to be filled; candidates' names; number to vote for; and provision for write-in votes if required.

Provision should be made for absentee balloting.

Proxy voting is not allowed.

A sample ballot should be posted before the election.

Distribution of Ballots – The Committee shall post any ballots mailed to individual members at least fifteen (15) days prior to the date when they must be received back in order to be counted. These mail ballots must include instructions for voting and returning the ballots. A double envelope method is required and a form of voter identification must appear on the outer return envelope. All mail ballots must be returned to a Post Office Box and shall be picked up only by a member of the Elections Committee or a designee appointed by the Chairperson.

For ballots voted in the locals, the Committee will require a pre-printed signature roster system to ensure only eligible voters voted and to certify the numbers of valid votes cast. Ballots shall be distributed in such a manner as to ensure all eligible members are provided a reasonable opportunity to vote, that the secrecy of the ballot is ensured, and that a record of those voting is maintained.

It is not recommended that you use the school mailing system. If you do so, make sure that you are not in violation of any school district policy with reference to using the district mailing system for union activities. Ballots must not be left unattended.

Conducting the Election – Make sure you have a clear, detailed procedure in place for all those actually conducting the election. If ballots are returned to a central location, they must be secured until the time of the tally.

Tally Procedures – Make sure decisions about valid ballots are consistent. If the intention of the voter is clear, the ballot should be counted. Keep all tally materials with the appropriate ballots and other election materials for that election. If you have several buildings voting, make sure that the ballots for each building are stored separately in case you need to reconstruct all, or merely a portion of an election in the event of a challenge.

Results – All candidates, and your Executive Board, must be notified of the results of the election in a timely manner. All members should have easy access to this information by way of posting the election results.

Storage – All election material must be securely stored for one (1) year. It is not necessary to purchase a lockable file cabinet. Bundling all the materials in one box, sealing the box and noting a destroy date will suffice.

LOCAL ELECTIONS

Paper Trail – A good election process can be reconstructed, if necessary in the case of a challenge. Be sure your procedures are consistent.

Challenge Procedures – Detailed challenge procedures are set forth in the IEA-NEA Elections Handbook for all those elections under the purview of the state IEA-NEA Elections Committee or the IEA-NEA Review Board. Challenges are either made to the IEA-NEA Elections Committee or the IEA-NEA Review Board. If your local or region has challenge procedures in place, you must also exhaust those avenues for resolution but not lose sight of the timeline for challenge at the state level.

Run-off Elections – If a run-off election is necessary, it must be run in the same manner as the original election. The ballot should include one more candidate than the number to be elected.

In addition to the procedures outlined in this section, please refer to the “IEA Guidelines for Local, Regional and State Elections” on Page 2 of this Handbook.

BE CONSISTENT

Resources for help:

- **Regional Elections Chairperson**
- **State IEA-NEA Elections Committee**
- **State IEA-NEA Elections Committee Staff Liaison -**
- **Debra Knox 1/800/252-8076**
- **IEA President’s Office**

ELECTION CHALLENGES

ELECTION CHALLENGES

Any member(s) desiring to challenge the conduct of any election shall file a written challenge according to the procedures set forth in Article IV, Section 3 of the IEA-NEA Bylaws and the Election Challenge Procedures contained in this Handbook.

Bylaws Article IV Section 3 - Election Challenges

A. Representative Assembly Delegate Elections - Initial challenges to nomination or election procedures of IEA-NEA Representative Assembly and NEA Representative Assembly delegates must be filed with the Elections Committee by certified mail within fourteen (14) calendar days of the issuance of the election results. The Elections Committee's decision shall be rendered within thirty (30) calendar days of receipt of the challenge and may be appealed to the Review Board within fourteen (14) calendar days of the Elections Committee's decision. Should an election be overturned pursuant to this section, the new election shall be held promptly in accordance with the procedure set out herein. (Form in Forms Section of this Handbook.)

B. Other Local Elections - Initial challenges to all other elections governed by this Article shall be filed with the Review Board in accordance with Article X, Section 4. Such challenges must be made by certified mail within fourteen (14) calendar days of issuance of the election results.

ELECTION CHALLENGES

PROCEDURES FOR ELECTION CHALLENGES BEFORE THE ELECTIONS COMMITTEE

The procedures for the Elections Committee, as established by the Bylaws for initial challenges to nomination or election procedures of IEA Representative Assembly and NEA Representative Assembly delegates, shall be as follows:

A. Challenges

1. All challenges must be filed with the Elections Committee, c/o the IEA President, 100 E. Edwards Street, Springfield, IL 62704, by certified mail no later than (or within) fourteen (14) calendar days of the issuance of the election results.
2. All challenges must contain the following information:
 - a. Challenger's name and signature,
 - b. Date challenge filed,
 - c. Date election results issued and what the election results were, if the election has already been held; if the election has not yet been held, the scheduled date of election must be included;
 - d. Challenger's region and local,
 - e. Challenger's complete home and work addresses,
 - f. Challenger's home and work telephone numbers,
 - g. A specific statement of the alleged violation(s), including supporting facts and evidence, dates, and names and telephone numbers of persons providing evidence.
3. Upon receipt of the challenge, the Elections Committee Chairperson shall determine, from the face of the challenge, whether the challenge has been timely filed, whether it alleges a violation of an NEA and/or IEA election requirement, whether the challenge is 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, whether an appropriate party has filed the challenge, whether all required information is included in the challenge, and whether the alleged violation could reasonably affect or have affected the outcome of the election.
4. If the Elections Committee Chairperson determines that the challenge either has not been timely filed, fails to allege a violation of an NEA and/or IEA election requirement, fails to include the challenger's name, signature and home or work telephone number, has not been filed by an appropriate party, or alleges a violation which could not reasonably affect or have affected the outcome of the election, the challenge will be dismissed.
5. If the Elections Committee Chairperson determines that the challenge is insufficiently supported by prima facie evidence of a violation, the party submitting the challenge shall be so informed and shall be asked to resubmit promptly by a specific date the challenge with sufficient evidence. Failure to resubmit the challenge by that date will result in dismissal of the challenge.

(Items 3-5 can be done either by or with the assistance of the Committee's legal staff liaison.)

ELECTION CHALLENGES

B. Investigation and Hearing

1. If the challenge meets the above requirements, the Elections Committee shall so notify the challenger, the challenged party or parties, and the appropriate local/regional association election official(s) and/or officer(s). A copy of the challenge shall be sent to the affected party or parties.
2. The Committee shall ask each party to submit by a specific date all information which would be of assistance to the Committee in rendering a decision.
3. The Election Committee Chairperson shall determine, in the Committee's discretion, whether an evidentiary hearing will be needed. (The legal staff liaison can either make this determination or assist in making it.) If such a hearing is necessary, all Committee members and parties to the challenge shall be contacted to set a date and location for the hearing. Such hearing shall be conducted in accordance with the IEA Board of Directors' policy regarding IEA Review Board hearings.
4. If it is determined that an evidentiary hearing is not needed, the Elections Committee shall hold a telephone conference call to discuss and decide the challenge.

C. Decision

1. The Elections Committee shall notify the parties of its decision in writing.
2. Such decision shall be sent to the parties by certified mail, return receipt requested.

D. Appeal

1. The Elections Committee decision shall be appealable in accordance with IEA and/or NEA bylaws and/or election rules.
 - a. IEA RA Delegate: The Elections Committee's decision involving IEA RA delegates may be appealed to the IEA Review Board within fourteen (14) calendar days of receipt of the decision.
 - b. NEA RA Delegate: The Elections Committee's decision involving NEA RA delegates may be appealed to the IEA Review Board within fourteen (14) calendar days of receipt of the decision. The Review Board's decision may then be appealed to the NEA Credentials Committee, pursuant to NEA's election rules.
2. Appeal of the Elections Committee's decision to the Review Board shall automatically stay the implementation of the decision. However, upon a party's request or on its own action, the Review Board may lift such stay.
3. Failure to comply with the Elections Committee's decision involving IEA RA delegate(s) may result in delegates not being seated at the IEA RA and may constitute a basis for disciplinary action before the Review Board.
4. Failure to comply with the Elections Committee's decision involving NEA RA delegates shall be reported to NEA, which shall then determine the appropriate action to be taken regarding the issuance of credentials to and the seating of delegates at the NEA RA. Furthermore, such failure may constitute a basis for disciplinary action before the IEA Review Board.

ELECTION CHALLENGES

PROCEDURES FOR ELECTION CHALLENGES BEFORE THE REVIEW BOARD

The procedures for the Review Board, as established by the Bylaws for appeals of IEA Elections Committee decisions regarding initial challenges to nomination or election procedures of IEA Representative Assembly and NEA Representative Assembly delegates, and for initial challenges to all other elections governed by Article IV of the IEA Bylaws, shall be as follows.

A. Challenges

1. All challenges must be filed with the Review Board, c/o the IEA President, 100 E. Edwards Street, Springfield, Illinois, by certified mail within 14 calendar days of the issuance of the election results or the exhaustion of any applicable and timely local association or region election challenge procedure, or within 14 calendar days of receipt of the Elections Committee's decision, whichever is applicable.
2. All challenges must contain the following information:
 - a. Challenger's name and signature
 - b. Date challenge filed
 - c. Date election results issued and what the election results were, if the election has already been held; if the election has not yet been held, the scheduled date of election must be included
 - d. If applicable, date that local or region election challenge procedure was exhausted and result of that procedure
 - e. If challenge involves an appeal of an Elections Committee's decision, the date of receipt of that decision, and a copy of that decision
 - f. Challenger's region and local
 - g. Challenger's complete home and work addresses
 - h. Challenger's home and work telephone numbers
 - i. A specific statement of the alleged violation(s), including supporting facts and evidence, dates, and names and telephone numbers of persons providing evidence
3. Upon receipt of the challenge, the Review Board Chairperson shall determine, from the face of the challenge, whether the challenge has been timely filed, whether it alleges a violation of an NEA, IEA and/or local association election requirement, whether the challenge is 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, whether an appropriate party has filed the challenge, whether all required information is included in the challenge, and whether the alleged violation could reasonably affect or have affected the outcome of the election.
4. If the Review Board Chairperson determines that the challenge either has not been timely filed, fails to allege a violation of an election requirement, fails to include the challenger's name, signature and home or work telephone number, has not been filed by an appropriate party, alleges a violation which could not reasonably affect or have affected the outcome of the election, or fails to include, if appropriate, the Elections Committee's decision and the date the challenger received a copy of that decision, the challenge will be dismissed.

ELECTION CHALLENGES

5. If the Review Board Chairperson determines that the challenge is insufficiently supported by prima facie evidence of a violation, the party submitting the challenge shall be so informed and shall be asked to resubmit promptly by a specific date the challenge with sufficient evidence. Failure to resubmit the challenge by that date will result in dismissal of the challenge.

B. Investigation and Hearing

1. If the challenge meets the above requirements, the Review Board shall so notify the challenger, the challenged party or parties, and the appropriate local/regional association election official(s) and/or officer(s). A copy of the challenge shall be sent to the affected party or parties.
2. The Review Board shall ask each party to submit by a specific date all information which would be of assistance to the Board in rendering a decision.
3. The Review Board Chairperson shall determine, in the Board's discretion, whether an evidentiary hearing will be needed. If such a hearing is necessary, all Board members and parties to the challenge shall be contacted to set a date and location for the hearing. Such hearing shall be conducted in accordance with the IEA Board of Director's Review Board policies.
4. If it is determined that an evidentiary hearing is not needed, the Review Board shall hold a telephone conference call to discuss and decide the challenge.

C. Decision

1. The Review Board shall notify the parties of its decision in writing.
2. Such decision shall be sent to the parties by certified mail, return receipt requested.
3. The decision shall issue within 30 days of the conclusion of the hearing, if no transcript is prepared, or within 30 days of the Review Board's receipt of the transcript, if one is prepared.

D. Appeal

1. A Review Board decision, including a decision to dismiss a challenge pursuant to Sections A.4 and 5 above, may be appealable in accordance with IEA and/or NEA bylaws and/or election rules.
2. Failure to comply with the Review Board's decision may result in representatives not being seated at or on the appropriate IEA governing body or bodies and may constitute a basis for disciplinary action before the Review Board.
3. Failure to comply with the Review Board's decision involving NEA RA delegates shall be reported to NEA, which shall then determine the appropriate action to be taken regarding the issuance of credentials to and the seating of delegates at the NEA RA. Furthermore, such failure may constitute a basis for disciplinary action before the Review Board.

**FORMS CONTAINED IN THIS SECTION AND THE ELECTIONS TO WHICH
THEY APPLY ARE LISTED BELOW:**

REGION ALLOCATION PLAN.....	IEA RA DELEGATE
& RATIONALE WORKSHEETS	
REGION ELECTION PLAN WORKSHEET ..	IEA RA DELEGATE
.....	NEA RA LOCAL DELEGATE
.....	REGION CHAIR & V-CHAIR
NOMINATION FORM	NEA RA STATE DELEGATE
.....	HIGHER ED COUNCIL
.....	HIGHER ED REP & ALT
.....	ESP COUNCIL
.....	ESP REP & ALT
.....	ETHNIC-MINORITY REP & ALT
RETIRED NOMINATION FORM.....	IEA RA RETIRED DELEGATE
.....	NEA RA RETIRED DELEGATE
STUDENT NOMINATION FORM	IEA RA STUDENT DELEGATE
.....	NEA RA STUDENT DELEGATE
DECLARATION OF CANDIDACY	EXECUTIVE OFFICER
.....	NEA DIRECTOR
AUTHORIZATION OF DESIGNEE	EXECUTIVE OFFICER
.....	NEA DIRECTOR
POLL WATCHER.....	EXECUTIVE OFFICER
.....	NEA DIRECTOR
CAMPAIGN EXPENSES	EXECUTIVE OFFICER
.....	NEA DIRECTOR
ELECTION RESULTS REPORT	REGION CHAIR & V-CHAIR
.....	IEA BOARD OF DIRECTORS MEMBER
CERTIFICATE OF ELECTION	EXECUTIVE OFFICER
.....	NEA DIRECTOR
.....	ESP COUNCIL CHAIR & V-CHAIR
.....	ESP REP & ALT
.....	HIGHER ED COUNCIL CHAIR & V-CHAIR
.....	HIGHER ED REP & ALT
.....	RETIRED COUNCIL CHAIR & V-CHAIR
.....	ETHNIC-MINORITY REP & ALT
.....	REGION CHAIR & V-CHAIR
ELECTION CHALLENGE	ALL ELECTIONS

WORKSHEET
IEA-NEA REPRESENTATIVE ASSEMBLY
REGIONAL ELECTION ALLOCATION PLAN
 20____

Region No. _____

Chairperson _____

No. of Delegates _____

<u>District # and Name of Non-clustered Locals</u>	<u>No. of Members</u>	<u>Ratio</u>	<u>No. of Delegates</u>
--	---------------------------	--------------	-----------------------------

(Exclude Chair, Vice Chair
E/M delegate at large)

1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____

<u>Clusters/District # and Name of Locals</u>	<u>No. of Members</u>	<u>Total</u>	<u>Ratio</u>	<u>No. of Delegates</u>
---	---------------------------	--------------	--------------	-----------------------------

Cluster Name _____	_____	_____	_____	_____
_____	_____			
_____	_____			
_____	_____			
_____	_____			
_____	_____			
_____	_____			

WORKSHEET
Region No. _____

<u>Clusters/District # and Name of Locals</u>	<u>No. of Members</u>	<u>Total</u>	<u>Ratio</u>	<u>No. of Delegates</u>
Cluster Name _____		_____	_____	_____

	<u>No. of Members</u>	<u>Total</u>	<u>Ratio</u>	<u>No. of Delegates</u>
Cluster Name _____		_____	_____	_____

	<u>No. of Members</u>	<u>Total</u>	<u>Ratio</u>	<u>No. of Delegates</u>
Cluster Name _____		_____	_____	_____

Date of Region Council Approval

If you have more than four clusters, please duplicate this worksheet.

WORKSHEET
RATIONALE

(Reason for Deviation from Acceptable Ratio)

WORKSHEET
REGION _____ ELECTION PLAN

	IEA RA DELEGATE ELECTION RUN OFF		NEA RA LOCAL DELEGATE ELECTION RUN OFF		(if applicable) REGIONAL OFFICES ELECTION RUN OFF	
PART A:						
NOMINATIONS SENT		N/A		N/A		N/A
NOMINATIONS DUE		N/A		N/A		N/A
ELECTION DATE						
TIME OF ELECTION						
PLACE OF ELECTION						
DATE OF TALLY (within 7 days of election)						
TIME OF TALLY	* _____	* _____	* _____	* _____	* _____	* _____
PLACE OF TALLY	* _____	* _____	* _____	* _____	* _____	* _____

_____ Check here if no ballots are returned by mail by individual members or by locals.

_____ Check here if ballots are returned by mail by individual members and/or by locals. If so, please complete Part B also.

PART B:

DATE BALLOTS MAILED (at least 15 days prior to tally date)						
LATEST DATE BALLOTS MAY BE RECEIVED FOR TALLY						
RETURNED BALLOTS MAILED TO (must be a P. O. Box)	* PO Box _____ City _____	* PO Box _____ City _____	* PO Box _____ City _____			

RETIRED NOMINATION FORM FOR
(Indicate Position Sought)

_____ Chairperson*
 _____ Vice Chairperson**
 _____ Council Member at Large
 _____ Northern Section Council Member
 _____ Suburban Section Council Member
 _____ Central Section Council Member
 _____ Southern Section Council Member

____ At Large Delegate
____ Ethnic Minority Delegate

** NEA RA Retired Successor Delegate

[illegible]

Fax _____ E-Mail _____

[illegible]

68

(Indicate Position Sought)

____ Delegate to IEA RA
____ Delegate to NEA RA

[illegible]

Fax _____ E-Mail _____

Name of College/University

Date and Seal

[illegible]

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**DECLARATION OF CANDIDACY
FOR
IEA-NEA EXECUTIVE OFFICER OR NEA DIRECTOR**

I, _____, hereby declare my intention to run for the following office:

_____	President	_____	Vice-President
_____	Secretary-Treasurer	_____	NEA Director

Signature of Candidate

Date

THE OFFICIAL NOMINATION OF CANDIDATES OCCURS AT THE IEA-NEA RA

RETURN TO: IEA PRESIDENT'S OFFICE
 100 E. Edwards
 Springfield, IL 62704

**IEA-NEA EXECUTIVE OFFICER
OR
NEA DIRECTOR**

AUTHORIZATION OF DESIGNEE

I, _____, candidate for the position of _____,
appoint _____ to serve as my Designee for the purpose of drawing lots for
order of nominations presentation and for ballot position. My Designee is authorized to speak
for me in giving information to the Elections Committee and to receive instructions for me from
the Elections Committee. I understand that this authorization may be revoked by me only by
written statement delivered to the Elections Committee Chairperson.

Signature of Candidate

Date

IEA-NEA EXECUTIVE OFFICER OR NEA DIRECTOR

POLL WATCHER FORM

Dear Candidate:

You are allowed to have up to two poll watchers to observe the IEA Election in which you are a candidate. Please make sure that you and your poll watchers sign the POLL WATCHER credentials. The POLL WATCHER must verify these credentials with the Chairperson of the Elections Committee in order to be allowed to observe the election.

Sincerely,

IEA Elections Committee

Rights of the POLL WATCHER: Once the POLL WATCHER has verified his/her credentials with the Elections Chairperson on the day of the election, he/she has the following rights.

1. Poll watchers are allowed to be present in the polling place before the polls are open, throughout the election, and after the polls close.
2. Poll watchers may challenge a person's right to vote. The Elections Committee acts as a board in the hearing of a challenge. A majority vote of the Committee decides to sustain or overrule a challenge.
3. The poll watchers may remain through the canvassing of the ballots. Once the canvassing has begun, then he/she may leave only after the election results have been reported.

POLL WATCHER Credentials

Date

_____ is certified as a POLL WATCHER for _____
(POLL WATCHER) (Candidate)
who is seeking the office of _____

(Signature of POLL WATCHER)

(Signature of Candidate)

POLL WATCHER Credentials

Date

_____ is certified as a POLL WATCHER for _____
(POLL WATCHER) (Candidate)
who is seeking the office of _____

(Signature of POLL WATCHER)

(Signature of Candidate)

FINAL REPORT OF CAMPAIGN REVENUES AND EXPENSES

SOURCES OF REVENUE:

Cash

Individuals Within the State \$ _____

Groups Within the State \$ _____

Groups Outside the State \$ _____

Individuals Outside the State \$ _____

Income from Raffle or Similar Fund-Raising Activity \$ _____

Donations In Kind \$ _____

TOTAL \$ _____

EXPENSES

Printing \$ _____

Mailing \$ _____

Other Media Materials \$ _____

Hospitality and Entertainment \$ _____

Campaign Committee Expenses \$ _____

Giveaways \$ _____

Raffle or Similar Fund-Raising Activity \$ _____

TOTAL \$ _____

Will fund-raising activities continue beyond the deadline for submission of this report?

YES _____

NO _____

Date: _____

Signature of Candidate _____

Candidate for Office of _____

Mailing Address _____

Complete and return to the IEA Elections Committee no later than thirty (30) days following certification of the election results.

ELECTION RESULTS REPORT FORM

(To be disseminated within one week of the tally date.)

This is to certify that the individual(s) noted has(have) been duly elected to the office of:
(check one)

- _____ A. Regional Chair/NEA RA State Delegate (Requires a majority vote)
- _____ B. Regional Vice-Chair/NEA RA Successor Delegate (Requires a majority vote)
- _____ Total number of valid ballots cast. _____ Total number of spoiled ballots.

(List ALL candidates and total votes received.)

_____ Votes	_____ (Name of Candidate)	_____ Votes	_____ (Name of Candidate)
_____ Votes	_____ (Name of Candidate)	_____ Votes	_____ (Name of Candidate)
_____ Votes	_____ (Name of Candidate)	_____ Votes	_____ (Name of Candidate)
_____ Votes	_____ (Name of Candidate)	_____ Votes	_____ (Name of Candidate)
_____ Votes	_____ (Name of Candidate)	_____ Votes	_____ (Name of Candidate)
_____ Votes	_____ (Name of Candidate)	_____ Votes	_____ (Name of Candidate)

_____ Election Chairperson	_____ Region Number
_____ Date of Election	_____ Date of Report

Copies of this report are to be sent to the following:

1. All Candidates
2. All Local Presidents
3. IEA President

(LOCAL PRESIDENTS - PLEASE POST)

CERTIFICATE OF ELECTION OF IEA-NEA BOARD MEMBER

This is to certify that _____ has been duly elected by majority vote consistent with IEA-NEA requirements set forth in Bylaw Article IV and (check appropriate one)

- ____ a. Article XII, Section 2-C (REGION CHAIRPERSON/V-CHAIR)
- ____ b. Article XII, Section 3-B (SECTIONAL ETHNIC MINORITY REPRESENTATIVE/ALT)
- ____ c. Article XII, Section 3-B (SECTIONAL ESP REPRESENTATIVE/ALT)
- ____ d. Article XII, Section 3-B (SECTIONAL HIGHER ED. REPRESENTATIVE/ALT)
- ____ e. Article XII, Section 4-B (EDUCATIONAL SUPPORT PROFESSIONAL CHAIRPERSON/V-CHAIR)
- ____ f. Article XII, Section 4-B (HIGHER EDUCATION CHAIRPERSON/V-CHAIR)
- ____ g. Article XII, Section 4-B (RETIRED CHAIRPERSON/V-CHAIR)
- ____ h. Article VI (NEA DIRECTOR)
- ____ i. Article V (EXECUTIVE OFFICER)

The newly elected Board member shall (**complete a, b, or c**)

- ____ a. Serve a regular term of THREE years beginning July 15, 20____.
- ____ b. Fill the vacancy of the unexpired term of _____(office) for _____ years (assumes office immediately).
- ____ c. Serve a term of _____ years in accordance with reorganization procedures duly adopted by the Board of Directors.

ADDRESS OF NEW BOARD MEMBER:

Name (Region #)

Street

City/State Zip

Home Phone

Cell Phone

E-Mail

SIGNED:

Fax

Elections Committee Chair
(State Or Region, as applicable.)

School

Date

School Phone

(Attach a copy of the election results)

ELECTION CHALLENGE

Any challenge of election shall be filed according to the IEA-NEA Bylaws, Article IV, Section 3 - Election Challenges.

Challenges to Representative Assembly Delegate Elections must be directed to the Elections Committee, Illinois Education Association-NEA, 100 E. Edwards, Springfield, IL 62704, 800/252-8076. Challenges to all other local elections must be directed to the Review Board, Illinois Education Association-NEA, 100 E. Edwards, Springfield, IL 62704, 800/252-8076.

FROM: Challenger's Name _____

Region _____

Complete Address:

Home Phone: (____) _____

Work Phone: (____) _____

Cell Phone: (____) _____

SPECIFICALLY STATE THE ALLEGED VIOLATION OF ELECTION PROCEDURES.

Date

Signature of Challenger

TO: IEA Board of Directors

FROM: 2011-2012 IEA Campaign Review Committee

DATE: February 21, 2012

RE: **IEA Campaign Review Committee Report**

The 2011 IEA Representative Assembly passed a new business item that directed IEA to review our state officer election campaign activities and their financial implications, and make recommendations to the IEA Board of Directors for alternatives that would streamline and facilitate the process:

The RA directs the president to establish an ad hoc committee to review the campaign practices and procedures for candidates elected at the RA. The committee shall review pre-election campaign activities, the length of the campaign term and the financial implications of such activities and make a recommendation to the IEA Board of Directors for alternatives which will streamline and more efficiently facilitate the process. The committee shall consider the integration and utilization of the various technologies and social networks available today. This committee shall investigate opportunities for a candidates' forum during existing IEA events to reduce the physical and financial impact on candidates. The committee shall make its recommendation to the IEA Board of Directors no later than February 2012.

2011 RA NBI #22. The stated rationale for the new business item was as follows:

The campaign season for candidates aspiring to be elected to IEA offices is too long, too time consuming and too costly.

Id.

To carry out this task, the 2011-2012 IEA Campaign Review Committee was created and charged as follows:

1. To review campaign practices and procedures for candidates elected at the IEA-RA;
2. Review pre-election campaign activities, the length of the campaign term and financial implications of such activities and make a recommendation to the IEA Board of Directors for alternatives which streamline and more efficiently facilitate the process;
3. Consider the integration and utilization of the various technologies and social networks available today;

4. Investigate opportunities for a candidates' forum during existing IEA events to reduce the physical and financial impact on candidates; and
5. Make recommendations to the IEA Board of Directors no later than February 2012.

The members of the committee were selected from the IEA Elections and IEA RA Planning Committees, and are: Bob Bradish (Region 15, IEA RA Planning Committee); Jack Casey (Retired, IEA Elections Committee); Laura Cuchra (Region 15, IEA Elections Committee); Allen Monts (Retired, IEA Elections Committee); Yousef Matariyeh (Region 31, IEA RA Planning Committee); and Beverly Stewart (Region 67, IEA RA Planning Committee). Staff liaisons to the committee are: Mitchell Roth, IEA General Counsel; Debra Knox, IEA Personnel Director and Staff Liaison to the IEA Elections Committee; and Tim Crawford, IEA Director of Program Development and Staff Liaison to the IEA RA Planning Committee.

The committee held 2 telephone meetings. At our first meeting, the committee decided to survey online the 2011 IEA RA delegates for whom we have email addresses, current members of the IEA Board of Directors (BOD) and candidates for IEA office over the past 7 years (going back to the 2005 RA elections). That survey is attached to this report as addendum A. In developing the survey, committee members relied upon their own experiences and thoughts, and focused on the use of technology to supplement and possibly replace current campaign options.

One thousand four hundred and sixty-four (1464) emails were sent. Over 120 were returned due to incorrect email addresses. Some of the 1464 email addresses were duplicate addresses for the same individuals. There were 287 attempts to take the online survey; however, a few of the surveys were blank. Additionally, some respondents misunderstood the survey and completed it as if it dealt with State of Illinois elections, as opposed to internal IEA elections. Those responses were not counted or analyzed. A total of 249 responses were actually counted and analyzed, for a return rate of close to 20%. [An analysis of the responses](#) is posted on the IEA MOSS BOD area in the 2012 February Board meeting folder.

At our second meeting, the committee carefully considered the responses we received, our charge, our experiences with IEA's election procedures, IEA's finances, the state of technology and IEA's present capability to utilize it, prior IEA campaign review committee reports from the [1999-2000](#) and [2002-2003](#) years [also available on the IEA MOSS BOD area in the 2012 February Board meeting folder], IEA's and NEA's governing documents, and the Landrum-Griffin Act, its rules and decisions implementing it. In looking at the survey responses, not surprisingly, respondents found candidate printed literature and face-to-face interactions with the candidates, either at their regions, RA, or other events, the most valuable aspects of campaigns. The 2 things which respondents found least valuable and disliked the most were candidate communications, other than printed materials, directly to them, such as phone calls and emails, and the RA gauntlet (lining the hallways leading to the RA business meetings with candidate supporters handing out literature, holding signs, etc.). The responses regarding the gauntlet echo the

complaints reported in the 2 prior campaign review committee reports. A good number of respondents felt that the campaign period is too long! Respondents also found that the knowledge and experience of candidates was the thing which influenced their vote the most, with the image candidates' portray, their vision and positions on issues next in rank. Candidate campaign speeches and face-to-face interactions other than at their regions and the RA, followed in importance. Respondents overwhelmingly supported interacting with candidates through videoconferencing, live streaming (video/audio interaction over the Internet) and at IEA statewide conferences. Substantially fewer respondents supported interactions through tele-town hall meetings, which IEA first used last August and September to share information regarding SB 7. A large number of respondents also thought that using one or more of the foregoing electronic or statewide conference options in place of candidates physically traveling to region or multi-region meeting was a good idea.

In deciding what to do with the information gathered through the survey, we must keep in mind that the IEA's ability to use both its own funds in an election and restrict the activities of candidates is legally limited. Association funds can be used to distribute nonpromotional information about all candidates and for notices, factual statements of issues not involving candidates, and "other expenses necessary for the holding of an election." It is this latter phrase that provides us with some degree of flexibility in looking at alternatives to streamline and facilitate our current election process. This flexibility is tempered, however, by the IEA's organizational resources and our ability to make use of current technology. Furthermore, the law governing our elections specifically intends to place every member, whether he/she be new or veteran, officer or rank-in-file, on an equal playing field when it comes to participating and being a candidate in an election. This is a fundamental right and protection provided under the Landrum-Griffin Act, which can only be limited for very compelling reasons. In addition, every member in good standing is eligible to be a candidate, subject to uniformly imposed reasonable qualifications, and has the right to vote for or otherwise support the candidate or candidates of his/her choice. Thus, expenditure limits and restrictions on a candidate's right to communicate about his/her candidacy are prohibited, except under reasonably compelling circumstances. With all of these considerations in mind, the committee proposes the following recommendations and suggestions, as ways to streamline and facilitate our current process for elections held at the IEA RA.

SUMMARY OF RECOMMENDATIONS

1. **Hold Multiple Videoconferences for Candidates to Interact with Delegates**
 - **Pilot single-region office and multi-region office candidate videoconferences for the next 2 IEA election cycles and assess their viability**
2. **Provide Candidates with Their Own Webpages on the IEA Members-only Website**

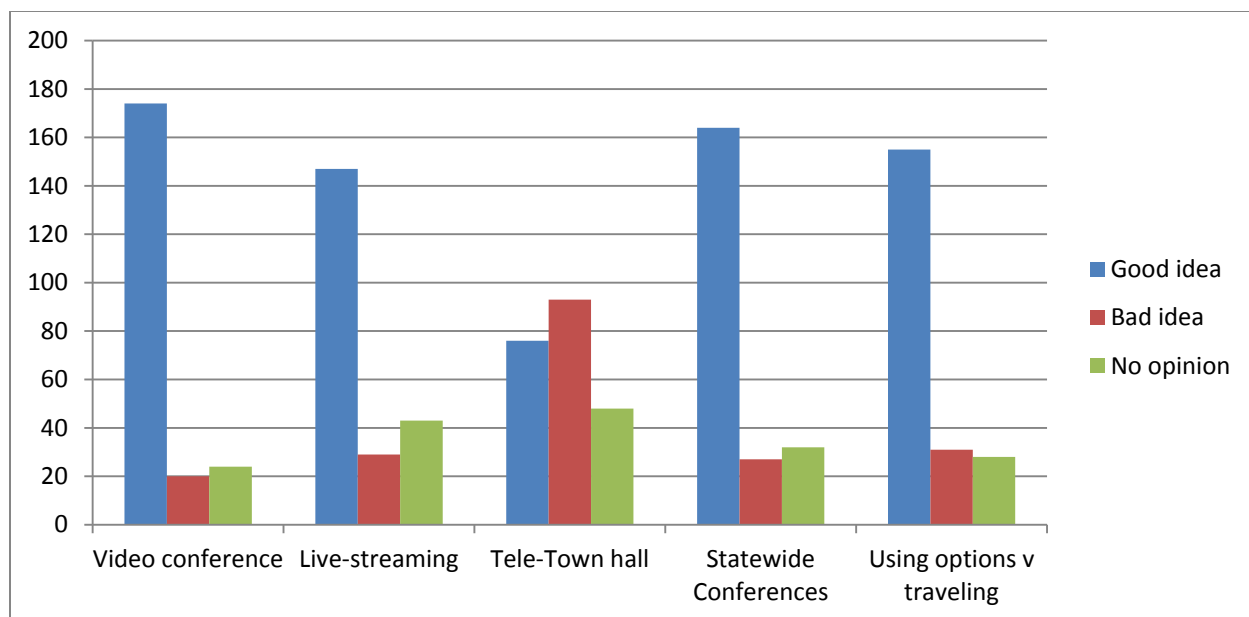
- Provide each candidate with his/her own webpage on IEA members-only website, where they can post nonpromotional campaign materials and have links to personal campaign websites and social media sites
3. **Limit the Number of Questions Included on Constituency-group Candidate Questionnaires**
 - Restrict the number of questions in questionnaires from major IEA constituency groups to no more than 3
 4. **No Modification to the Candidate Forums at the RA, Candidate Videos or Candidate Booklet and Advocate Information on the IEA Members-Only Website**

RECOMMENDATIONS AND RATIONALE

1. **Hold Multiple Videoconferences for Candidates to Interact with Delegates**

Survey respondents indicated that the opportunity to interact with candidates and learn about their experience and positions on issues either through those interactions or through the candidates' printed materials were the most liked and valuable campaign activities. The same number found face-to-face interactions at the RA and in their regions valuable, while a few more found face-to-face interactions at other events, such as statewide conferences, and candidate campaign materials valuable. On the other hand, an overwhelming number of respondents thought that interacting with candidates through video conferencing, live streaming and statewide conferences was a good idea, and a significant number of them thought that it was a good idea to use one or more of these methods of interacting with candidates in place of face-to-face region or multi-region meetings:

	Good idea	Bad idea	No opinion
Video conference	174	20	24
Live-streaming	147	29	43
Tele-Town hall	76	93	48
Statewide Conferences	164	27	32
Using options v. traveling	155	31	28



Currently, IEA has videoconference equipment in the following 11 offices: Bloomington; Carterville; Champaign; Chicago; Edwardsville; Elgin; Lombard; Matteson; Moline; Springfield – PDC; Springfield – HQ. While over ½ of these offices have full-size, dual-screen equipment, others have smaller, desktop videoconferencing equipment. Currently, due to system limitation, plans to provide such equipment to the remaining region offices is on hold. While almost ½ of IEA offices currently have such equipment, over ½ do not and likely will not in the near future. Therefore, a significant number of IEA members and delegates do not have access to videoconferencing in their home region offices. And while the technology does exist to connect personal computers to videoconferences in areas whose offices do not have videoconference equipment, concerns exist regarding the quality and capacity of the connections and how that might impede the interaction between candidates and delegates. Currently, we can handle no more than 5 to 6 connections for a single videoconference, so that all participants would be able to see and hear each other. A decision to replace face-to-face region meetings with candidates with videoconferences across the state would require delegates from region offices without videoconference equipment to travel to offices which did. We do not believe that is a fair burden to place on delegates. Nor do we recommend replacing face-to-face region meetings with videoconferences in those region offices which do have videoconference equipment, at least at this point in time. We recommend that over at least the next 2 election cycles (2013 and 2014 IEA RA elections), IEA “pilot” the use of videoconference candidate meetings. We recommend that both single-region office and multiple-region office videoconferences be tested. The quality of the videoconference connections and the interactions between candidates and delegates should be assessed, as well as whether face-to-face region meetings were also needed. While it is our hope that these candidate videoconferences will be able to cut down on the number of face-to-face region meetings which occur, we believe that this option must be tested before any state election rule is established.

2. Provide Candidates with Their Own Webpages on the IEA Members-only Website

As mentioned earlier in this report, we must keep in mind that the IEA's ability to use its own funds and other assets ("resources") in an election is legally limited. Association resources can be used to distribute nonpromotional information about all candidates and for notices, factual statements of issues not involving candidates, and "other expenses necessary for the holding of an election." Among our resources is the IEA website. For several years, candidates' **Advocate** statements and photographs and the Candidate Booklet have been placed on the website. We recommend that use of the members-only section of the website be expanded for candidates. This would include providing each candidate with his/her own webpage, posting of IEA and candidate-produced videos, posting of information regarding the candidates' positions on issues, posting of the candidates answers to the various IEA questionnaires, and links to the candidates' personal campaign websites and Facebook and other social media sites. Any things posted on the IEA members-only website, including candidate-produced videos, would need to be reviewed by IEA to assure that it were nonpromotional in order to be legally permissible. Furthermore, IEA would need clearly to warn those who used the members-only website to access the candidates' personal websites and social media sites of the prohibition on doing so through use of IEA or IEA-reimbursed electronic equipment or services, including Internet.¹

¹ During the last contested election cycle in 2010-2011, IEA issued the following alert to staff and IEA Board members regarding use of IEA or IEA-reimbursed equipment and services:

Please remember that under IEA Policy, your IEA computer, IEA email system and IEA-reimbursed Internet connection/provider may not be used to correspond with "candidates" or members regarding any candidate or campaign promotional activities or to develop promotional campaign materials. "Candidate" is defined as "the candidate and anyone acting on his or her behalf, or at this or her direction." It is okay for candidates to email you at your IEA email address from their own computer, using their own Internet Service Provider. This is analogous to snail mailing campaign information to you at your school or association address. However, if you respond from your IEA email address to the candidate, or from your own, personally funded email address but using IEA-provided/funded equipment, and your response directly or indirectly indicates your support/nonsupport for their candidacy, you are then using IEA resources and a violation has occurred.

Furthermore, you need to be careful when it comes to using IEA or IEA-reimbursed electronic equipment or services to follow or communicate through **Facebook**, **Twitter** or other social media with an IEA member who has become a candidate or the candidate's campaign committee. Being/becoming a "Friend" or "Fan" of a member who has a **Facebook** page (i.e., "Jane Doe") and has become a candidate is not by itself a violation of the IEA Policy. If, however, while you are using IEA or IEA-reimbursed electronic equipment or services, you post an initial or responsive message on that candidate's individual **Facebook** page that is supportive of his/her candidacy or non-supportive of his/her opponent's candidacy, a violation will occur. Also if you 1) become a "Friend" or "Fan" of a candidate (i.e., "Jane Doe for IEA President") or candidate campaign committee (i.e., "Jane Doe for IEA President Campaign Committee") **Facebook** page or 2) send a direct message or response to or "re-tweet" a posting from a candidate's **Twitter** account that is supportive of his/her candidacy or non-supportive of his/her opponent's candidacy while using IEA or IEA-reimbursed electronic equipment or services, a violation will occur. Merely following a candidate on **Twitter** without any other action by you, however, is not a violation of the IEA Policy.

3. Limit the Number of Questions Included on Constituency-group Candidate Questionnaires

Despite the fact that the 1999-2000 and 2002-2003 campaign review committee reports both recommended the use of a unified candidate questionnaire which included questions from the various constituency groups within IEA, we have drifted away from such a questionnaire to where, once again, candidates are requested to fill out separate questionnaires from several different groups. While this committee believes that a unified questionnaire continues to be preferable, we realize that whether there is one unified questionnaire or a questionnaire for each major IEA constituency group, the number of questions should be limited. No delegate enjoys reading through and no candidate enjoys filling out a questionnaire or questionnaires which include too many questions! Therefore, we recommend that the number of questions from each major constituency group be limited to no more than 3. The IEA Elections Committee questionnaire, which is directed to overall IEA issues as opposed to issues of importance to a specific constituency within IEA, may contain more than 3 questions.

4. No Modification to the Candidate Forums at the RA, Candidate Videos or Candidate Booklet and Advocate Information on the IEA Webpage

Although not directly surveyed, there was no significant level of responses which suggest any appreciable changes to the candidate forums at the RA, the candidate videos or the posting of the candidate booklet and **Advocate** information on the IEA website.

SUGGESTIONS

While not arising, for legal reasons, to the level of recommendations, the committee makes the following suggestions, based upon the survey responses, as guidance to candidates and their campaigns.

You should be aware that using the resources of your school district, other employers or other unions to directly or indirectly support any candidate is also a violation.

Remember, IEA or IEA-reimbursed electronic equipment or services are resources of the IEA, paid for by dues money and may not be used to promote anyone's candidacy.

Finally, BOD Policy 17.5 specifically states that any BOD member who involves any staff member in internal political affairs, including internal political campaigns, "shall be subject to censure by the Board."

1. “Giveaways,” Campaign Literature, Candidate-to-Member Communication Other than Campaign Literature and the “Gauntlet”

The good number of those who responded to the survey expressed concern about the amount of money expended, including “giveaways,” candidate-to-member contacts, such as phone calls and emails, and the gauntlet of campaign workers that delegates must walk through in order to get to the RA meeting room. In regard to giveaways, the most often made complaints were that too much is being given out and expended, and that many see these as an attempt to “buy” votes. This sentiment was also expressed but to a lesser degree about hospitality suites, which raised some delegate concerns over alcohol consumption and IEA liability. As for campaign literature, most of those who responded expressed that there is just too much campaign material distributed. The committee sensed that many of these comments indicated that this overabundance of campaign literature was actually counterproductive, and possibly frustrated delegates about the whole election process. Clearly, focused literature, detailing a candidate’s experience, background and positions on issues is most valuable to the delegates. Candidate contact of members by phone or email was particularly disliked by a significant number of respondents. Finally, the “gauntlet” engendered some very strong feelings, as it did in the prior campaign review committee surveys and reports, among many delegates. They feel harassed and inundated. It does not appear to have a positive impact on many if any delegates. The committee believes that IEA could not totally prohibit the gauntlet. However, while the committee does believe that IEA could legally prohibit the gauntlet from its location at the entrance to the RA meeting room, the gauntlet might just move itself to another location, causing the same aggravation for delegates at that location. Therefore, we strongly urge candidates to seriously consider the negative impact the gauntlet has on delegates, and take steps to correct this problem, such as limiting the number of people they have staffing the gauntlet, keeping in mind the delegates’ strong sentiments. Finally, the committee concludes that the survey responses, when they come to expenditures, indicate that candidates should watch what they spend, don’t spend a lot on “giveaways”, don’t oversaturate delegates with campaign materials, and don’t overdo hospitality suites.

2. Length of Campaign

IEA policy permits the campaign period for offices elected at the IEA RA to begin at the end of the previous year’s RA. NEA rules provide the same campaign period for candidates for NEA Director. The sentiment gleaned by the committee and expressed by a number of survey responses is that the campaign period is too long. While the committee is concerned about being able to legally shorten the campaign period such that non-incumbent candidates are disadvantaged, we believe that candidates need to take heed of delegates’ feelings that the process is too long and may be counterproductive.

Attachment

2011-2012 Campaign Review Committee Report.doc

A publication of the

PERSONNEL DEPARTMENT

July 2013

Illinois Education Association-NEA

100 E. Edwards Street
Springfield, IL 62704-1999

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