

**CALIFORNIA TEACHERS ASSOCIATION  
ELECTIONS AND CREDENTIALS COMMITTEE**

**REQUIREMENTS  
FOR  
CHAPTER ELECTION  
PROCEDURES**

**2007-2008**



## **PREFACE**

It is the purpose of these requirements to ensure the integrity of the electoral process. The principle of voting is to determine the mandate or choice as expressed by those voting. This requires that election procedures, both for candidates and for policy issues, must afford every member the opportunity to vote. These requirements must be followed if the chapter's bylaws and/or standing rules do not address these issues.



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# **CALIFORNIA TEACHERS ASSOCIATION ELECTION PROCEDURES**

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

Chapter presidents must provide members an opportunity to vote in all elections. Chapter presidents do not have the option of deciding that such elections shall not be held.

The Elections Committee shall be appointed at the beginning of each school year in accordance to the chapter's adopted bylaws and standing rules. In the absence of such a document, the president of the unit should appoint an Elections Committee and chairperson to be approved by the appropriate governance body to which it is responsible. The Committee should be composed of at least three members who are not on the Executive Board, who are familiar with the unit operations and who are not seeking election.

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

## **I. Election Timeline and Procedural Components**

1. The timeline, procedural components, voting by mail procedure and the challenge procedure must be established prior to the election. If the unit has year-round schools, more time is needed because mail balloting may be required.
  2. A Timeline for Elections shall include the following:
    - a. Announcement of vacancy(ies) and term(s) of office using a method that will ensure each member is aware of the opportunity to file a declaration of candidacy;
    - b. At least fifteen (15) calendar days between the announcement date of the vacancy(ies) and the date of the election;
    - c. Place, time and date of receipt (date received, not post-marked date) for declaration of candidacy forms;
    - d. Final date to acknowledge candidates' declaration of candidacy;
    - e. Date for preparation of ballots;
    - f. Date on which ballots will be distributed;
    - g. Date by which to request a ballot;
    - h. Date(s) when voting will take place;
    - i. Deadline date (date received, not post-marked date), time and place for return of ballots;
    - j. Date, time and place where ballots will be counted, which should be immediately following the deadline for receipt of voted ballots;
    - k. Date that announcement of results will be made to leadership, candidates, members, and posted at each work site, which date shall be not later than five (5) calendar days following the counting of ballots;
    - l. Dates and timelines for run-off election, if necessary; and,
    - m. Deadline for filing of challenges (date received, not post-marked date).
- [Revised 6/04, 6/06, 06/07]*
3. Procedural Components should include the following:
    - a. Method by which Declaration of Candidacy(ies) are submitted (mail, hand delivered, fax);

- b. Procedure for distributing election guidelines/rules to candidates;
- c. Campaign statement of candidates (decide on limit of number of words, and what to do if limitation is exceeded);
- d. Method of distribution of ballots;
- e. Whether declarations of candidacy must be accompanied by a campaign statement, or whether the statement will be solicited later. If later, a deadline date must be established;
- f. Provision for elections committee chairperson or designee to be present to receive declaration of candidacy by filing deadline;
- g. Announce that the names are to be listed according to CTA alphabet; *[Revised 6/05]*
- h. If not provided in governance documents, election will be decided by majority vote. If a candidate does not receive a majority vote, a run-off election shall be conducted between the candidates receiving the highest number of votes. The names on the ballot will be one (1) more than the number of vacancies to be filled;
- i. Decide on the number of observers per candidate to be allowed when ballots are counted. *[Revised 7/03]*

## **II. Open Nomination**

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

## **III. Term**

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

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

## **IV. Campaign Finances and Use of Unit Resources**

- 1. Monies received by a unit by ways of dues, assessment or similar levy must not be used to promote any candidate.
- 2. A unit may not state or indicate its preference for a candidate in the unit's publications.
- 3. Each candidate shall have the right to a list of the work site names and work site addresses with the number of Active members at each site for the purposes of campaigning.

*[Revised 7/03, 6/04, 6/05, 6/07]*

- 4. A unit will honor all reasonable requests by a candidate to distribute campaign literature at his/her expense to all members in good standing, whether the distribution is by mail or other means. However, if distribution of campaign literature for one candidate is without charge, then distribution for all candidates must be without charge. Treating all candidates the same by refusing to honor any and all reasonable requests for distribution of campaign literature at the candidate's expenses is not permitted. The unit should inform all candidates of rules in this regard.
- 5. A candidate may not accept direct contributions from a unit's treasury or indirect contributions in the form of use of a unit's assets, facilities, staff, equipment, mailings, good will or credit.
- 6. A candidate may not use the official logo of the unit or official Association title in a way that suggests that the candidate has the support of the unit, CTA or any of its affiliates.

7. All campaign flyers/materials must include a disclaimer stating that the view and opinions expressed are those of the candidate and not necessarily those of the unit, CTA or any of its affiliates. [Revised 6/04]

## V. Candidates' Statements

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

## VI. Ballot

The CTA alphabet should be used to determine the order of the candidate's names. In the event that the last name of more than one candidate begins with the same letter or more than one candidate has the same last name, the CTA alphabetical order shall continue to be applied throughout the name including the first name.

The ballot shall state the name of the office, the term, and the name for each office/position of the candidate(s) who have filed declarations of candidacy within the timeline. The ballot shall include space for a write-in candidate for each office/position, except in a run-off election. [Revised 6/04, 6/07]

## VII. Voting Methods

All Active members must have an opportunity to vote. Active members who are off-track or on a dues paying leave shall be notified by mail in order to provide them an opportunity and right to vote. Active members on Association/Affiliate business may request a ballot by mail. Provisions must be made for members to cast a ballot in such a manner that the person casting the vote cannot be identified with the vote cast. Voting by mail may be used at sites where it is difficult to contact each member individually to secure a signature on the official voter roster/sign-up sheet. Any Association member who is either a candidate on the ballot or whose immediate family member is a candidate shall abstain from all election committee activities on that particular ballot. [Revised 6/04, 6/07]

### 1. On Site Voting.

- a. Each voter must sign or initial a voter roster/sign-up sheet before receiving a ballot.
  - 1) Voter Roster – List of eligible voters.
  - 2) Voter Sign-up Sheet – List of eligible voters which includes a place for a signature.
- b. The marked ballot must be returned to a designated site representative or ballot box.
- c. Campaign materials are not allowed in or near the polling area nor should campaign materials be distributed with ballots. [Revised 6/04]
- d. Site representatives must return all voter roster/sign-up sheets and ballots to the Elections Committee by the designated date and time.  
*Refer to Section IX for the Counting of Ballots procedures.*

### 2. Vote by Envelope at School/Work Site/Specified Site

The following procedure may be used to conduct an election at sites where it is difficult to contact each member individually to secure a signature on the official voter sign-up sheet upon issuance of the ballot. The additional cost of using inner and outer envelopes shall be borne by the unit.

- a. A list of current members shall be prepared, which includes each member's name and work address.
- b. The voter shall be provided with the following:

1. A ballot;
  2. Instructions on folding of the ballot in the inner envelope; placement of the ballot in the unsigned inner envelope; signature on the outer envelope addressed to the chapter; and deadline date for receipt of the voted ballot at the chapter office;
  3. A small envelope (inner envelope) in which to place the voted ballot; and,
  4. A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
- c. Prior to the counting of the ballots, the names on the outer envelope shall be checked against the official list of voters. The name on the official list shall be marked to show that the voter has returned a ballot.
  - d. The outer envelope shall then be opened and put in a separate stack for safekeeping.
  - e. All inner envelopes shall be placed in a separate receptacle.
  - f. The inner envelopes shall be slit and the ballots removed from the envelopes, stacked and then counted.
  - g. Refer to Section IX for the Counting of Ballots procedures.

### **3. Voting by Mail**

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

- a. A list of current official members shall be prepared, which includes the following: name, work and home address.
- b. A determination shall be made prior to the election whether the ballots shall be sent to the school/work site or to the home of the member.
- c. The voter shall be provided with;
  1. A ballot
  2. Instructions on:
    - a.) Folding and placing of the ballot in the unsigned inner envelope;
    - b.) Placing of the unsigned inner envelope into the outer envelope;
    - c.) Signature and school/work site on the outer envelope addressed to the chapter; and
    - d.) Deadline date for receipt of the voted ballot at the chapter office.
  3. A small envelope (inner envelope) in which to place the voted ballot;
  4. A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
- d. At the time of counting, the names on the outer envelope shall be checked against the official list of voters.
- e. The name on the official list should be marked to show that the voter has returned a ballot.
- f. The outer envelopes shall then be opened and put in a separate stack for safekeeping.
- g. All inner envelopes shall be placed in a separate container.
- h. All inner envelopes shall be opened and the ballots removed from the envelopes, stacked, and then counted.
- i. The elections committee shall prepare a CTA Official Teller's Report with the results of the mail ballot.
- j. The chapter shall arrange to have the results announced.

*[Revised 6/04]*

## VIII. Vote Requirement

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

1. Majority means more than half of the legal votes cast.
2. A plurality vote means the largest number of votes to be given any candidate or issue. When there is a tie in a plurality election and it is not feasible to conduct the election again because of the time factor, the following procedure shall be followed:
  - A. When there is a tie, the ballots shall be recounted.
  - B. If the result is still a tie, the elections committee chairperson shall:
    - 1) Call the candidates (according to the CTA alphabet) and inform them of the tie and that a coin toss shall be used to determine the winner.
    - 2) If the first candidate called wishes to remain in the race, the chairperson shall ask that candidate to choose "heads" or "tails" in the coin toss.
    - 3) The elections committee chairperson shall designate the time and place for the coin toss and inform the candidates, who may have an observer present. The observer may be the candidate.
    - 4) The elections committee shall note the coin toss on the CTA Official Teller's Report.
    - 5) The elections committee shall follow the established procedure in notifying the candidates of the results.
3. A two-thirds (2/3) vote means at least two-thirds (2/3) of the legal votes cast.
4. For unit officers, the election will be by majority vote.
5. For State Council: *[See the Election Timelines, Procedures, and Guidelines in section IV-9.2 of the CTA Elections Manual.]*
  - A. If a unit is a single electoral district or a multiple unit electoral district, the election for State Council Representative will be by majority vote.
  - B. If the unit is within a multiple unit electoral district, results must be sent to the Service Center Council Elections Committee to determine if a candidate has received a majority vote.
6. If a candidate does not receive a majority vote, a run-off election shall be conducted among the candidates receiving the highest number of votes. The names on the ballot will be one (1) more than the number of vacancies to be filled. When there are only two candidates for an office, the candidate receiving the higher number of legal votes cast shall be declared elected. **There shall be no provisions for write-in candidates in run-off elections.**
7. For NEA Local Delegates, the election will be by majority or plurality vote, as defined in the unit's governance documents. Results must be sent to the CTA Governance Department and to the Service Center Council.
8. An election for NEA Delegates may be waived and the candidate(s) declared elected if, following a period of open nominations, the number of candidates is equal to or less than the number of delegate positions to be filled. An affiliate utilizing this provision must have adopted a governing provision or election policy allowing such a practice. This election practice will not generate successor delegates unless the nomination process requires candidates for both regular and successor delegate positions.
9. For NEA State Delegates, the election will be by majority or plurality vote as defined in the unit's governance documents. Successor delegates (alternates) are ranked in the order of votes received. Results must be sent to the Service Center Council, which will forward the results to CTA.
10. For additional CTA/NEA election guidelines refer to the official CTA Elections Manual.

## **IX. Counting of Ballots**

1. Each candidate may designate one observer, who may be the candidate, to observe the vote counting process. The observer shall not interfere with the work of the Elections Committee and must remain in the room where the vote count is taking place.  
[Revised 6/04, 6/05]
2. The Elections Committee shall count the ballots, which should be immediately following the deadline for receipt of voted ballots.  
[Revised 6/04]
3. Blank and/or illegal ballots for each office/position shall be set aside. Examples include the following:
  - a. More ballots than signatures;
  - b. Ballot(s) submitted after deadline;
  - c. Member not listed on the voter roster;
  - d. Voter's intent unclear;
  - e. Votes cast for more than number allowed;
  - f. Votes cast on unofficial ballot (probably reproduced); and,
  - g. Voting envelopes without a signature.
4. The Elections Committee should categorize each illegal ballot, make a determination on whether the vote(s) in that category should be counted separately, and make a note of the decision. The ballots should remain separate.
5. If the illegal vote(s) would affect the outcome, the chairperson of the Elections Committee should report this to the unit president so that the appropriate governance body can decide how the ballots should be recorded.
6. The Elections Committee will prepare the Teller's Report, recording information on the total number of votes cast, the number needed to win/pass, the number of votes received by each candidate/issue and the number of blank and illegal ballots for each office/position with an explanation of illegality, and signed by each Elections Committee member. A listing of school(s)/work site(s) whose ballots were set aside and not counted shall be included with an explanation of illegality.
7. The Chairperson of the Elections Committee will deliver the report of the election results to the president and interested parties. The election results shall be posted at each work site as soon as possible following the election.
8. The ballots and voter sign-up sheets should be retained by the unit for one year after the election.

## **X. Challenge Procedure**

If a method for challenging elections is not provided in the unit's governance documents the following will apply:

1. A challenge cannot be initiated until after the results of the election have been posted at each work site.
2. Challenging party(ies) must notify the unit president of a challenge in writing within ten (10) calendar days after the announcement of the results of the election.

[Revised 7/03]

The notification must:

- a. Specify which unit bylaw(s) and/or standing rule(s) have been violated.
- b. Attach evidence of the violations, insofar as possible.
- c. List names and addresses of parties who can give evidence.

3. Within ten (10) calendar days after receipt of the challenge, the unit's Elections Committee shall, in accordance with the unit's bylaws and standing rules, conduct an investigation and determine whether or not the challenge:
  - a. Is a violation of the unit's election requirement(s).
  - b. Is supported by the appropriate documentation.
  - c. Requires more information. The information will be obtained via the most feasible method.
  - d. Identified violation(s) that may have affected the outcome of the election.
4. The unit's Elections Committee shall submit a written report including issues, findings, and recommendations, within the same 10 day period, to the Chapter President and the Governance Board.
5. The Governance Board shall act on the report no later than 10 days following receipt of the written report of the Elections committee in accordance with CTA Challenge Procedures as described in Appendix O – CTA Challenge Procedures – Local Elections of CTA Elections Manual. The Governance Board must issue its findings in writing to the challenger.

*[Revised 6/05, 6/06]*

6. Any member of the Governance Board who was a candidate on the ballot, or whose immediate family member is a candidate on the ballot, shall abstain from voting on the report. If in the case where the majority of the Governance Board is unable to act on the challenge the decision shall move to the next highest decision making body according to the unit's governance documents. *[Adopted 6/05]*
7. If an individual wishes to appeal the decision of the unit's governance body, he/she may file an appeal in writing within ten (10) calendar days from the date of the decision of the unit's governance body to the CTA President. The appeal shall be the original challenge filed at the unit level, and shall include:
  - a. Specifically which unit bylaw(s) and/or standing rule(s) have been violated.
  - b. Attached evidence of the violations, insofar as possible.
  - c. List names and addresses of parties who can give evidence.
  - d. Written response of unit's governance body to original challenge.
8. If the Governance Board fails to act within ten (10) calendar days of the initial challenge, the individual may file an appeal as described in 7 (a-c) above by writing to the CTA President.
9. In the circumstance where an election has been conducted to elect one or more officers, and the elections results are challenged, the winner(s) of the election shall hold office until such time as the challenge is resolved. *[Revised 6/04]*
10. The challenge procedure for election of State Council Representatives and Alternates, and State or Local Delegates to the NEA Representative Assembly is outlined in the CTA Elections Manual.

*[Revised 07/02]*

### **CTA Challenge Procedures – Local Elections**

#### **Local Level**

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

**CTA Level**

If an individual wishes to appeal the decision of the unit's governance body, he/she may file an appeal in writing within ten (10) calendar days from the date of the decision of the unit's governance body to CTA President who shall refer the challenge to Chairperson of CTA Elections and Credentials Committee.

If the Governance Board fails to act within ten (10) calendar days of the initial challenge, the individual may file an appeal in writing to CTA President who shall refer the challenge to Chairperson of CTA Elections and Credentials Committee.

**CTA Elections Committee Level**

The CTA Elections and Credentials Committee investigates challenge, determines actions to be recommended to the President.

At the direction of the CTA President, the CTA Elections and Credentials Committee initiates appropriate action and submits a report of findings and recommendations to the CTA President and the CTA Board.

**CTA Board of Directors Level**

CTA Board shall send approved recommendations to the Local President/ Service Center Council Chairperson, to the challenging party(ies), and to members who provided information to the CTA Elections and Credentials Committee

**Monitoring**

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

**CTA Geographic Director Level**

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

**Follow-Up Contacts**

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

**CTA President and CTA Board of Directors**

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

*[Revised 6/04, 6/06]*

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

**XI. Initiative Procedures**

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

2. A member shall file a notice of the intent to circulate a petition with the chapter president by including a copy of the petition to be circulated, and the names of at least three persons supporting the proposed measure and responsible for its circulation.
3. The chapter president shall register the receipt of the notice of the intent to circulate, and acknowledge such registration in writing with the member filing the notice.
4. The timeline for gathering signatures will commence the day that the notice of intent is registered. A maximum of fifteen (15) calendar days shall be permitted to obtain the signatures of at least sixty percent (60%) or more of the active members of the chapter. The petition shall contain the question proposed to be placed on the ballot.
5. The circulators shall present to the chapter president the petition(s) containing original signatures.
6. The chapter president shall have thirty (30) calendar days in which to verify the membership of the signers of the petition.
7. If there are insufficient signatures, the petition circulator will be notified within three (3) calendar days, that the petition failed for a lack of signatures.
8. The chapter president shall cause a ballot to be furnished to the members no less than fifteen (15) calendar days after verification of membership, provided that the period that school is officially not in session shall not be included in this count.
9. Regular election procedures (e.g., election of officers) shall be followed including voting times.
10. The proposal shall take effect immediately upon receipt of the required number of votes, unless otherwise specified.

## **XII. Referendum Procedures**

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

## **XIII. Recall Procedure**

If a method for the recall of a unit officer is not provided in the unit's governance documents the following procedures will apply:

1. Any Active member(s) desiring to recall a unit officer must file a copy of a petition with the chairperson of the Elections Committee before it can be circulated. *[Revised 6/05]*
2. The petition must include the following information:
  - a. Name of individual who is the subject of the recall;
  - b. Office of individual;
  - c. Date of petition;
  - d. Name(s) of person(s) filing petition;
  - e. Notation that "Each signature must be in ink"; and,
  - f. Space must be provided for the printed name, signature, work site and date of signing for each name on the petition.

3. Within fourteen (14) working days after receipt, the chairperson of the Elections Committee shall determine whether the petition contains the necessary information.
  - a. If the petition does not contain the necessary information, the Chairperson of the Elections Committee shall so notify the petitioner(s). (See number two (2) above.)
  - b. If the petition contains the necessary information, the Chairperson of the Elections Committee shall inform the petitioner(s) of the rules, procedures and timeline (beginning date and deadline for gathering of signatures), and the need for protection of due process rights of the parties.
  - c. The Chairperson of the Elections Committee shall send written notification to the unit officer whose recall is being proposed and shall also notify the other officers of the unit. A copy of the petition shall be enclosed.
4. Monies from a unit's treasury or indirect contributions in the form of use of a unit's assets, facilities, staff, equipment, mailings, good will and credit, or in-kind services must not be used in the recall process.
5. No unit may state or indicate its preference in the unit's newspaper, newsletter or communications to its members.
6. The timeline for gathering of signatures will commence the day that the notice of intent is registered. *[Revised 6/05]*
7. A maximum of sixty (60) calendar days shall be permitted to obtain the signatures of at least twenty-five percent (25%) or more of the Active members of the chapter. *[Revised 6/05]*
8. The signed petitions must be received by the chairperson of the Elections Committee by the specified deadline date.
9. The Elections Committee shall have ten (10) calendar days after receipt of the petition to verify signatures.
10. If there are insufficient signatures, the chairperson of the Elections Committee shall notify the petition circulator(s) by mail that the petition failed for a lack of signatures. *[Revised 6/05]*
11. Immediately upon verification of the signatures, the chairperson of the Elections Committee shall notify the president/designee of the fact that a recall has been initiated.
12. The chapter president, or the chapter vice president if the chapter president is the person being recalled, shall cause a ballot to be furnished to Active members no less than twenty (20) calendar days after verification of membership. The period that school is officially not in session shall not be included in this count. *[Revised 6/05]*
13. The election must be concluded within fifteen (15) calendar days of distribution of the ballots.
14. The election must be conducted with provisions for a secret ballot and voter sign-up sheets.
15. The election shall be certified in accordance to the unit's bylaws.
16. The Chairperson of the elections committee will deliver the report to the president of the unit who will immediately notify all interested parties of the election results. The election results shall be posted at each work site as soon as possible following the election.

### **XIII. Staff Involvement**

Elections and elections procedures are the responsibility of the Association membership, in particular the elections committees. Association staff provides support and assistance to the local and service center council membership and elections committee in meeting these responsibilities. Associate staff assistance shall be in the areas of maintaining a reference copy of the election calendar established by the elections committee,

preparing drafts of the various elections documents, and based on the decisions of the elections committee, preparing those documents selected for use by the elections committee for distribution. Professional staff responsibility shall be commensurate with their consultant role to either the local chapter or the service center council. Neither Associate staff nor Professional staff shall take on responsibility for the decision-making or physical handling of the actual elections procedures and processes.

*[Revised 07/03]*

## Appendix A- Sample Timeline for Elections

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

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

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

## **Appendix B - Sample Announcement**

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

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

### ***Sample Announcement***

#### **ANNOUNCEMENT OF ELECTION**

The CTA/XYZ Unit will be holding its election for the offices of Unit President, Unit Vice President, Unit Secretary and Unit Treasurer during the second week of May. Nominations are open (which means that anyone who is a unit member is eligible to nominate any other unit member, including himself/herself for office). The term for each office is from September 1, 200\_, to August 31, 200\_. Anyone wishing to run for office should file a declaration of candidacy form so that it is received at the unit office, 123 Main Street, Anytown, **no later than 5:00 p.m. on** Wednesday, April 25, 200\_.  
(Post-marked date not accepted.)

## Appendix C - Sample Declaration of Candidacy Form

### CTA/XYZ UNIT DECLARATION OF CANDIDACY FOR OFFICE

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

<u>OFFICE</u>	<u>TERM OF OFFICE</u>
_____ CTA/XYZ Unit President	_____
_____ CTA/XYZ Unit Vice President	_____
_____ CTA/XYZ Unit Secretary	_____
_____ CTA/XYZ Unit Treasurer	_____

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

Date \_\_\_\_\_ Signed \_\_\_\_\_

Please print:

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

School/Work Address \_\_\_\_\_ Home Address \_\_\_\_\_

City/Zip \_\_\_\_\_ City/Zip \_\_\_\_\_

School/Work Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

This declaration must be received at the CTA/ABC Unit, 123 Main Street, Anytown, **no later than 5:00 p.m. on Wednesday, April 25, 200\_**. (Post-marked date not accepted.)

## **Appendix D- Sample Acknowledgment of Declaration of Candidacy Letter**

To: Candidate's Name  
From: CTA/XYZ Unit  
Re: Election  
Date: April 28, 200\_

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

The unit will publish campaign statements of candidates to members via a newsletter. Each candidate is eligible to submit a statement of no more than 25 words regarding his/her candidacy. The statement must be received in the CTA/XYZ Unit office, 123 Main Street, Anytown, no later than 5:00 p.m. on Friday, May 5. Please note that the unit will print only the first 25 words (not including your name) of the statement; in the event there are more than 25 words, words 26 and on will be omitted.

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

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

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

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

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

## **Appendix E- Sample Cover Letter to Association Representatives**

To: Association Representatives

From: CTA/XYZ Unit

Re: Unit Elections

Date: May 10, 200\_

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

Campaign Statement - one for each member

Ballot - one for each member, plus 3 extra\*

Voter Registration Roster/Sign-in Sheet(s) - appropriate number on which work site members may sign

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

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

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

Enclosures

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

## **Appendix F- Sample of Statements from Candidates**

Names are listed in the order of the CTA Alphabet:

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

*(Please note: the CTA Alphabet changes annually.)*

CTA/XYZ Unit

Campaign statements have been received from candidates for office for 200\_ - 200\_.

### **CTA/XYZ Unit President**

BROWN, MARY - (statement here)

BLUE, JOHN - (statement here)

### **CTA/XYZ Unit Vice President**

BLACK, ELIZABETH - (statement here)

PURPLE, DAN - (statement here)

### **CTA/XYZ Unit Secretary**

WHITE, BEN - (statement here)

GREEN, DAVID - (statement here)

### **CTA/XYZ Unit Treasurer**

GRAY, LETITIA - (statement here)

RED, HERMOINE - (statement here)

ORANGE, BRIGETTE - (statement here)



## Appendix H- Sample Ballot

CTA/XYZ UNIT  
200\_ BALLOT FOR OFFICERS

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

CTA/XYZ UNIT PRESIDENT	VOTE FOR
Term of Office:	ONE
BROWN, MARY	<input type="checkbox"/>
BLUE, JOHN	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	
CTA/XYZ UNIT VICE PRESIDENT	VOTE FOR
Term of Office:	ONE
BLACK, ELIZABETH	<input type="checkbox"/>
PURPLE, DAN	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	
CTA/XYZ UNIT SECRETARY	VOTE FOR
Term of Office:	ONE
WHITE, BEN	<input type="checkbox"/>
GREEN, DAVID	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	
CTA/XYZ UNIT TREASURER	VOTE FOR
Term of Office:	ONE
GRAY, LETITIA	<input type="checkbox"/>
RED, HERMIONE	<input type="checkbox"/>
ORANGE, BRIGETTE	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	

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

## Appendix I – Sample Teller’s Report

CTA/XYZ UNIT – Teller’s Report Teller’s Report		CTA/XYZ Unit President	CTA/XYZ Unit Vice President	CTA/XYZ Unit Secretary	CTA/XYZ Unit Treasurer
Total Ballots Cast	300	300	300	300	300
Blank & Illegal Ballots	17	6	0	11	289
Legal Votes Cast	283	294	300	146	146
Number of Votes Needed to Elect	Majority	143 Majority	148 Majority	151 Majority	Majority
Candidates	Brown, Mary Blue, John Yellow, Kitty (Write-in)	175 Black, Elizabeth 102 Purple, Dan 6 Mustard, Colonel (Write-in)	146 White, Ben 145 Green, David 3	200 Gray, Letitia 100 Red, Hermione Orange, Brigitte	109 146 34
Date	Teller	Teller	Teller	Teller	Teller

## Appendix J- Sample Announcement of Results

The CTA/XYZ Unit Elections Committee is announcing the results of the election held between May 15-18, 200\_, for Unit Officers for 200\_.

### CTA/XYZ UNIT PRESIDENT:

Total Ballots Cast	300
Blank and Illegal Ballots	17
Legal Votes Cast	283
Number of Votes Needed to Elect	143
Mary Brown	175
John Blue	102
Kitty Yellow (write-in)	6

### CTA/XYZ UNIT VICE PRESIDENT:

Total Ballots Cast	300
Blank and Illegal Ballots	6
Legal Votes Cast	294
Number of Votes Needed to Elect	148
Elizabeth Black	146
Dan Purple	145
Colonel Mustard (write-in)	3

A run-off election will be held between Elizabeth Black and Dan Purple since no candidate received a majority of the votes cast on the first ballot.

The run-off election will be held between June 1-5 at the individual school/work sites.

### CTA/XYZ UNIT SECRETARY

Total Ballots Cast	300
Blank and Illegal Ballots	0
Legal Votes Cast	300
Number of Votes Needed to Elect	151
Ben White	200
David Green	100

### CTA/XYZ UNIT TREASURER:

Total Ballots Cast	300
Blank and Illegal Ballots	11
Legal Votes Cast	289
Number of Votes Needed to Elect	146
Letitia Gray	109
Hermione Red	146
Brigette Orange	34

## Appendix K – Sample Recall Petition

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

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

<b>Name</b>	<b>Chapter Affiliate</b>

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

**Each signature must be in ink.**

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