



## Bylaws and Standing Rules

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# **BYLAWS**

## **Oceanside Teachers Association/OTA/NEA**

### **I. NAME AND LOCATION**

The official name of this Association shall be the Oceanside Teachers Association/CTA/NEA in San Diego County (OTA)

### **II. PURPOSES**

**The primary purposes** of this Association shall be:

- A. To represent its members in their relations with their employer, and to seek to be the exclusive representative of appropriate units of school employees in all matters relating to employment conditions and employer-employee relations including, but not limited to, wages, hours, and other terms and conditions of employment;
- B. To form a representative body capable of developing group opinion on professional matters to speak with authority for members;
- C. To provide an opportunity for continuous study and action on problems of the profession;
- D. To provide a means of representation for its ethnic-minority members;
- E. To promote professional attitudes and ethical conduct among members;
- F. To encourage cooperation and communication between the profession and the community;
- G. To foster good fellowship among members;
- H. To engage in political action for the benefit of its members and students; and
- I. To promote cooperation and communication between education support professionals and certificated educators.

### **III. AFFILIATION WITH CTA/NEA**

- A. The Oceanside Teachers Association shall be a chartered chapter of the California Teachers Association (CTA).
- B. The Oceanside Teachers Association shall be an affiliate local association of the National Education Association (NEA).

#### **IV. MEMBERSHIP**

- A. Categories of Membership. The primary category of membership shall be Active members.
- B. Active membership shall be open to any person who is engaged in, or who is on limited leave of absence from, professional educational work, is an employee of Oceanside Unified School District, and whose primary assignment is such as not to hold evaluatory responsibility over other employees to such an extent as not to be represented in the negotiations process by the bargaining unit. (If further options for membership classes are necessary to fit local needs, refer to OTA Membership Dues Schedule.)
- C. Membership may be granted upon initiation of payroll deduction or upon payment of annual Association/CTA/NEA dues.
- D. The right to vote and to hold elective office or appointive position within the Association shall be limited to Active members.
- E. Active members shall be eligible to vote in all elections, hold elective office or appointive positions, receive special services, obtain assistance in the protection of professional and civil rights, and receive reports and publications of the Association.
- F. An individual who is serving as a negotiator for a public school employer shall not be eligible for membership in the Association.
- G. Active members shall adhere to The Code of Ethics of the Education Profession.
- H. The rights to and privileges of membership shall not be abridged in any way because of age, sex, race, color, ethnic group, marital status, national origin, or sexual orientation.
- I. No member of the Association may be disciplined without due process. Due process includes the right to select representation, to present evidence on his/her behalf, to confront and cross-examine his/her accuser(s) and any other witnesses against him/her, and to examine and refute all evidence considered by the hearing panel, whether or not such evidence is presented at a hearing. The member has the right to appeal the decision of the hearing panel to the governing body.
- J. The membership year shall be that period of time from September 1 of any given calendar year through August 31 of the following calendar year, inclusive.
- K. Members have the right to be present at open sessions of meetings at which business of the Association is to be transacted.
- L. Members have the right to present matters of individual concern to the Representative Council or Executive Board.

#### **V. DUES, FEES, AND ASSESSMENTS**

- A. The basic annual dues level for Active members shall be sufficient to cover the operation expenses of the Association, the dues of CTA, and the NEA.
- B. The Association's portion of the basic annual dues shall be established by action of the active membership of the Association at the last regular meeting of the school year.
- C. The Association shall apportion any negotiated representation fee on the same percentage basis as the full Association/CTA/NEA dues.
- D. Membership shall be continuous after initial enrollment until delinquent or until a change in professional status shall make the member ineligible for membership. If by October 31 of any calendar year, a member has neither paid the established annual membership dues for the current membership year nor made satisfactory arrangements for payment, then that person's membership shall be considered delinquent and the name dropped from the rolls.

## **VI. POLICY-MAKING BODY**

- A. The policy-making body of the Association shall be a Representative Council. The Representative Council, comprised of Active members of the Association, derives its powers from and shall be responsible to the Active membership. Under certain circumstances, it may be necessary for the Executive Board to establish certain policies at times when it is not feasible for the Representative Council to be called. If such circumstances arise, it is understood that the policy/policies are to be considered temporary and will be brought to the Representative Council no later than its next regularly scheduled meeting.
- B. The Representative Council shall be composed of the following Active members:
  - 1. Voting members of the Executive Board, ex-officio;
  - 2. Member/Site Representatives elected on the basis of one-person-one-vote;
  - 3. The following additional representatives:
    - a. Elected Service Center Council Representatives, when not already serving on the Representative Council in another capacity;
    - b. Committee Chairperson, ex officio non-voting
    - c. OTA State Council Representatives; and
    - d. Any members of the Association who hold CTA/NEA offices or committee appointments, ex-officio non-voting.
- C. The Representative Council shall:
  - 1. Establish Association policies and objectives;

2. Adopt the annual budget of the Association on or before the first meeting of the fiscal year and raise additional funds required to carry on the work of the Association;
  3. Approve the establishment or discontinuance of committees recommended by the Executive Board; and
  4. Establish the annual dues of the Association.
- D. The Representative Council shall meet at least once during each month September through May (December optional); the number, place, and time of meetings to be decided by the Executive Board.
  - E. Special meetings of the Representative Council may be called by the President, the Executive Board, by petition containing the signatures of twenty percent (20%) of the Representative Council, or by the petition containing the signatures of twenty percent (20%) of the Active membership.
  - F. Special meetings of the Representative Council shall be called for a specific purpose and no business other than that for which the meeting is called may be transacted.
  - G. Notices and agendas for all meetings of the Representative Council shall be sent to all members of the Representative Council at least two days prior to the date of the meeting.
  - H. For emergency meetings of the Representative Council during crisis situations, the Executive Board shall adopt procedures to notify representatives of meeting dates, places, and times.
  - I. A quorum for all meetings of the Representative Council shall consist of a majority of all voting members of the Representative Council.
  - J. Members of the Representative Council shall serve a term of two terms (2) except for the CTA State Council whose terms are set by CTA. Each school site shall select its representatives every other year by the end of the academic year.

## **VII. MEMBER/SITE REPRESENTATIVES**

- A. Member/Site Representatives ~~representatives~~ shall be elected by and from the Active membership for each ~~faculty group~~ school site. Such elections shall be by open nominations and by secret ballot.
- B. Each shall be entitled to at least one representative and shall have one representative for each 20 Active members on the faculty, or a major fraction thereof.
- C. Active members who are not represented through an individual school faculty group shall be counted as a special Member/Site Representative entitled to the same representation on the Representative Council as individual school faculty groups. Where school district organizational structure does not make a single

grouping convenient, then adapt to two or more groups, as your local situation requires.

- D. Vacancies in the office of Member/Site Representative for whatever cause may be filled by properly elected replacements.
- E. Member/Site Representatives shall:
  - 1. Conduct regular and ongoing liaison between the Representative Council and the Active members of the site;
  - 2. Serve as the official channel through which written communications and publications can be easily and quickly transmitted between the Association and the members they represent and report actions of the Association to the members they represent;
    - a) The official Association communication channel travels from President to Executive Board to Representative Council to Members and vice versa.
    - b) Deviation from officially approved messaging may be subject to censure and/or removal from office by a majority vote of the Executive Board.
  - 3. Represent the views and input of the Active membership of the faculty in votes taken in the Representative Council, conducting frequent and regular polls of such membership for this purpose;
  - 4. Exercise their considered judgment on matters of immediate action in the Council; and
  - 5. Perform such additional duties as prescribed by the Executive Board.
- F. A Member/Site Representative may not conduct an election in which he/she is a candidate.

## **VIII. OFFICERS**

- A. The officers of the Association shall be a President, a First Vice President, a Second Vice-President, a Third Vice President, a Secretary, and a Treasurer.
- B. These officers shall be and remain currently paid-up local, state, and national (Active) members as a condition for nomination to and service in their respective positions during their terms of office.
- C. These officers shall be elected by and from the Active membership of the Association. Such elections shall be by open nominations and secret ballot.
- D. Officers shall be elected for a term of 3 year(s), commencing on July 1 of any calendar year.

- E. A vacancy shall be deemed to exist in the case of death, resignation, or inability to serve in any of the offices of the Association. If there is a vacancy occurring in the office of the President, the First Vice-President shall assume the office until such time as a special election can occur. In the event a vacancy occurs in the other offices, the Executive Board, at its next regular meeting, shall appoint a member of the Association to fill the office vacated. This appointment must then be approved by the Representative Council at its next regular meeting. This appointment is for the duration of the terms of the vacated office.
1. A person may not be reelected to the office of president for a maximum service of two full consecutive terms.
- F. The President shall be the chief executive officer of the Association and its policy leader. The President shall:
1. Preside at all meetings of the Association, the Representative Council and the Executive Board;
  2. Prepare the agenda for the meetings of the Association, the Representative Council, and the Executive Board;
  3. Be the official spokesperson for the Association;
  4. Adhere to the governance documents of the Association, CTA, and NEA;
  5. Appoint all Chairpersons and members of committees with the approval of the Executive Board as needed;
  6. Appoint the chairperson and members of the bargaining unit with the approval of the Executive Board by the beginning of each school year;
  7. Call meetings of the Association, Representative Council and the Executive Board;
  8. Propose the procedures for grievance processing for ratification by the Executive Board and the Representative Council;
  9. Suggest policies, plans, and activities for the Association and be held responsible for the progress and work of the Association;
  10. Attend meetings of the Service Center Council of which the Association is a part;
  11. Attend other CTA/NEA meetings as directed by the Representative Council;
  12. Be responsible for a Newsletter;
  13. Contact School Board Members;
  14. Attend Mutual Interest Meetings;
  15. Visit sites where Active members are employed;

16. Participate in Community Public Relations and Communications;
17. Attend and officially represent the Association at meetings of the local Board of Education, citizen committees, and other meetings so designated by the president or the Representative Council;
18. Be authorized to cosign checks, with the treasurer, drawn upon the treasury;
19. Perform such other duties as may be directed by the Executive Board or the Representative Council;
20. Be permitted to attend bargaining sessions, pre, post, and planning meetings as a non-voting member of the bargaining team;
21. Appoint a parliamentarian for meetings of the Representative Council and the Executive Board;
22. Serve as a non-voting member of all committees, except in the event of a tie vote; and
23. Meet with the first vice president to determine roles and responsibilities not otherwise specified below.

G. The First Vice-President shall:

1. Serve as assistant to the President in all duties of the President;
2. Assume the duties of the President in the absence of the President;
3. Be responsible for the formation and distribution of the Association's calendar of activities in coordination with the Member Engagement Chair;
4. Serve as coordinator of committee activities at the direction of the President;
5. Be authorized to cosign checks in the absence of the president or at the direction of the Executive Board;
6. Be responsible for Grievance Proceedings;
7. Accept the president's appointment to the Bargaining Committee and or the Insurance Committee, if offered;
8. Act as liaison to the Elections Committee, when not up for reelection;
9. Meet with the President to determine roles and responsibilities; and
10. Attend school board meetings on a rotating basis which will be determined each year at the Executive Board Retreat. Frequency to be determined at the annual Executive Board Retreat.

H. The Secretary shall:



1. Keep an accurate record of the proceedings of each meeting, regular or special, of the Association, Representative Council, and the Executive Board;
2. Be responsible for the distribution of minutes, notice of meetings, and agendas for all meetings to members of the Representative Council and Executive Board; and to the membership when appropriate;
3. Keep an accurate roster of the membership of the Association and of all committees in coordination with the uniserv office.
4. Carry on the correspondence pertaining to the affairs of the Association as directed by the President; and
5. Accept the president's appointment to the Catastrophic Leave Committee, if offered.
6. Attend school board meetings on a rotating basis which will be determined each year at the Executive Board Retreat. Frequency to be determined at the annual Executive Board Retreat.

I. The Treasurer shall:

1. Receive all funds belonging to the Association and be responsible for their safekeeping and accounting;
2. Pay out such funds upon orders of the President and cosign with the President all checks drawn upon the treasury;
3. Provide a written financial report for each regular meeting of the Representative Council and Executive Board;
4. Be responsible for an annual audit of the books of the Association and distributing a summary of this audit to the membership;
5. Submit membership and financial reports to CTA, NEA, and other agencies as required by law;
6. Chair the annual budget review for the next fiscal year; and
7. Attend Mutual Interest Meetings as needed.
8. Attend school board meetings on a rotating basis which will be determined each year at the Executive Board Retreat. Frequency to be determined at the annual Executive Board Retreat.

J. The Second Vice President shall:

1. In the absence of the President and First Vice President, attend and officially represent the Association at meetings of the local Board of Education, citizen committees, and other meetings so designated by the president or the Representative Council;

2. Assist the First Vice President with Committees;
3. Accept the President's appointment to the Bargaining Committee and/or the Insurance Committee, if offered;
4. Attend Mutual Interest Meetings as needed.
5. Attend school board meetings on a rotating basis which will be determined each year at the Executive Board Retreat. Frequency to be determined at the annual Executive Board Retreat.

K. The Third Vice President shall:

1. Accept the President's appointment to the District Calendar Committee, if offered;
2. Assist with special committees as directed by the president;
3. Attend Mutual Interest Meetings as needed;
4. Attend school board meetings on a rotating basis which will be determined each year at the Executive Board Retreat. Frequency to be determined at the annual Executive Board Retreat.; and
5. Be responsible for providing the "Know Your Contract" excerpts for monthly newsletters.

## **IX. EXECUTIVE BOARD**

- A. The Executive Board shall be composed of 1) the elected officers of the Association 2) members elected at large and 3) appointed, non-voting chairs from the Active membership (in compliance with the "one-person-one-vote" rule.)
  1. Elected Officers:
    - a) President
    - b) First Vice President
    - c) Secretary
    - d) Treasurer
    - e) Second Vice President
    - f) Third Vice President
  2. Elected At-Large Members:
    - a) High School (1)
    - b) Middle School (1)

- c) Elementary (2)
  - d) Support Services (1)
- 3. Appointed, Non-voting Chairs to Include But Not Limited To:
  - a) Political Action Committee Chair
  - b) Scholarship Committee Chair
  - c) Elections Committee Chair
  - d) Membership Engagement Committee Chair
  - e) Bargaining Committee Chair
  - f) LCAP Committee Chair
  - g) Budget Committee Chair
  - h) Organizing Committee Chair
  - i) Human Rights Committee Chair
  - j) Insurance Committee Chair
  - k) Grievance Committee Chair
  - l) Calendar Committee Chair
  - m) Catastrophic Leave Committee Chair
  - n) Grants and Awards Committee Chair
- B. All members of the Executive Board shall be Active members as a condition for nomination and service.
- C. All members of the Executive Board will attend school board meetings on a rotating basis which will be determined each year at the Executive Board Retreat. Frequency to be determined at the annual Executive Board Retreat.
- D. The At-Large members of the Executive Board shall be elected with open nominations and by secret ballot.
- E. The At-Large members of the Executive Board shall be elected for a term of 3 years, commencing on July 1 of any calendar year.
  - 1. The duties and responsibilities of the At-Large members of the Executive Board are to act as an intermediary party between the Executive Board and the At-Large member's representative constituency in order to bring forth concerns and issues to the Executive Board and to assist in the dissemination of information to its representative groups from the Executive Board.

- F. Vacancies in the position of At-Large members of the Executive Board shall be deemed to exist in the case of death, resignation, transfer or reassignment to a different level from that which they were elected, or other inability to serve in this position. If there is a vacancy occurring in this position, the President shall appoint an Acting At-Large replacement, contingent upon the majority approval of the Executive Board. This appointment shall remain in effect for the remainder of the term until the next regular election.
- G. The Executive Board shall meet prior to each regular meeting of the Representative Council and at such other times as the President may deem necessary, or upon written petition of a majority of the members of the Executive Board.
- H. The duties and responsibilities of the Executive Board are:
  - 1. Coordinate the activities of the Association;
  - 2. Act for the Representative Council when school is not in session;
  - 3. Direct the bargaining activities and grieving processing of the Association subject to policies established by the Representative Council;
  - 4. Recommend to the Representative Council the Association budget for the fiscal year at the first meeting of each school year;
  - 5. Approve by majority vote the President's committee appointments;
  - 6. Remove by two-thirds (2/3) vote committee appointments, including chairpersons;
  - 7. Adopt the Standing Rules for the Association;
  - 8. Adopt grievance procedure;
  - 9. Exercise all the business and organizational powers and duties for the Association as prescribed by law and these bylaws, subject to any restrictions that may be imposed by the Representative Council;
- I. A quorum for all meetings of the Executive Board shall consist of a majority of the elected members of that body. A member of the Executive Board shall not be permitted to exercise the right to vote or any other power and duty of office through proxy or alternate.
- J. Any Executive Board member who fails to attend two consecutive meetings of the Executive Board, without just cause, shall be deemed ineligible to continue to serve. That office shall be declared vacant by the President.

## **X. MEETINGS OF THE GENERAL MEMBERSHIP**

- A. Meetings of the Association may be called by the President, the Executive Board, or by written petition of twenty percent (20%) of the Active membership.

- B. Notices of the Association meetings including date, place, time, and purpose of the meeting shall be made available to all members of the Association at least two days before the meeting except during crisis situations.
- C. For emergency meetings during crisis situations, the Executive Board shall adopt procedures to notify the Association membership of meeting dates, places, and times.

## **XI. BARGAINING TEAM**

- A. The duties of the Bargaining Team are to represent and bargain for the bargaining unit members as determined by the SpringSpring Membership Survey.
- B. The President shall appoint all members, alternates, and the chairperson of the Bargaining Team with the approval by a majority of vote of the Executive Board.
- C. Vacancies created by resignation or inability to serve shall be filled by the Executive Board from the list of alternates.
- D. The Executive Board, by a two-thirds (2/3) vote, may remove a member of the Bargaining Team.
- E. The Bargaining Team shall be under the direction of the Executive Board and shall report its activities to the Executive Board, as the Board requires.
- F. The Bargaining Team is empowered to reach tentative agreements with the direct subject to ratification by the Active
- G. Responsibility and authority for directing the bargaining process on behalf of the Association are vested in the Executive Board subject to policies established by the Representative Council. The Executive Board is distinct from the Bargaining Team.
- H. Employees in the bargaining unit shall be surveyed to determine the contents of the proposed contract demands, and the Sunshine Proposal will be approved by the Executive Board prior to presentation to the District.
- I. The President, in cooperation with the Bargaining Team, shall provide for the dissemination of information regarding bargaining and the activities of the Bargaining Team to the general membership.
- J. Agreements reached between the Bargaining Team and the School Board or its representatives shall be considered tentative and not binding upon the Association until such agreements have been ratified by the Active membership unless such ratification shall have been specifically waived or otherwise delegated by that Active membership.
- K. The bargaining team, its chairperson, and such alternatives as the Executive Board deems necessary, shall be nominated by the president and approved by a majority vote of the Executive Board.

## **XII. GRIEVANCE PROCESSING**

- A. The Executive Board shall adopt, with the approval of the Representative Council, the procedures for grievance processing.
- B. These procedures shall include, but not be limited to, the following:
  - 1. Provide representation to assist all bargaining unit members in processing grievances;
  - 2. Ongoing training for handling grievances; and
  - 3. Evaluation of the Association's grievance policies and procedures.

## **XIII. NOMINATIONS AND ELECTIONS**

The Chapter shall follow and members are entitled to the rights contained in the CTA Requirements for Chapter Election Procedures published annually with the CTA Elections Manual. The chapter president must provide Active members an opportunity to vote in all elections.

- A. The Elections Committee and Chairperson shall be appointed by the President and approved by the Executive Board to which it is responsible at the beginning of each school year. The duties of the Elections Committee shall be to:
  - 1. Ensure that all Association/CTA/NEA election codes and timelines are followed;
  - 2. Establish, develop, and carry out election timelines and procedures;
  - 3. Prepare ballots for election of officers and such other elections as may be necessary;
  - 4. Provide certified results; and
  - 5. Process initial challenges.
- B. Elections shall be conducted with:
  - 1. Open nomination procedure;
  - 2. Secret ballot;
  - 3. All Active members vote;
  - 4. Record of voters receiving or casting ballots; and
  - 5. Majority vote, unless otherwise specified.

- C. State Council Representative elections shall be conducted in accordance with OTA guidelines after the chapter or service center council has been notified to do so by the OTA Elections Committee.
- D. NEA State Delegate elections shall be conducted in accordance with CTA guidelines.
- E. NEA Local Delegate elections shall be conducted in accordance with CTA/NEA guidelines.
- F. The Executive Board shall adopt Standing Rules setting forth the procedures for conducting elections.
- G. NEA State Delegate elections shall be conducted in accordance with CTA/NEA rules.
- H. NEA Local Delegate elections shall be conducted in accordance with CTA/NEA.

#### **XIV. COMMITTEES**

- A. Committees, except as otherwise provided in these bylaws, may be established and discontinued by the Executive Board, subject to approval by the Representative Council.
- B. Each committee shall submit periodic reports to the Executive Board and Representative Council.
- C. The working OTA Committees are Bargaining, Political Action, Insurance, Elections, Scholarship, Grievance, Organizing, Communications, Calendar, Catastrophic Leave, and Mutual Interest.
- D. The Executive Board will serve as any committee as a whole when appointed by the President, subject to approval by the Executive Board and Representative Council.

#### **XV. PARLIAMENTARY AUTHORITY**

- A. Robert's Rules of Order, Newly Revised, latest edition, shall be followed at all meetings of the Association, the Representative Council, and the Executive Board.

#### **XVI. AMENDMENTS/PROCEDURES:**

- A. These Bylaws may be amended by a two-thirds (2/3) vote of the representatives at any regular or special meeting of the Representative Council. Notice in writing of a proposed Bylaws amendment shall have been submitted to the Secretary (Secretary) and provided to members of the Representative Council at the meeting preceding the one at which it is to be voted upon.
- B. Amendments to the bylaws may be proposed by any member of the Representative Council.

# OTA Standing Rules

The rules in this section are taken from the [CTA Election Procedures and Requirements for Chapters and Service Center Councils](#). Updates to that document will be automatically included in this document.

## I. NOMINATIONS AND ELECTIONS

### A. Elections Committee

1. There shall be an Elections Committee.
2. The Elections Committee and Chairperson shall be appointed by the president and approved by the executive board to which it is responsible at the beginning of each school year.
3. The Committee shall be composed of at least three members who are not on the Executive Board, who are familiar with the unit operations, and who are not seeking election.
4. The Elections Committee is charged with ensuring that elections are conducted in a fair and impartial manner.
5. Any Association member who is either a candidate on the ballot or whose immediate family member is a candidate shall abstain from all election committee activities on that particular ballot.

### B. Appointment of Elections Committee

1. The Elections Committee and Chairperson shall be appointed by the president and approved by the Executive Board to which it is responsible at the beginning of each school year.
2. It will be composed of at least three members and two alternates:
  - a) who are familiar with the unit operations;
  - b) who are not seeking election themselves;
  - c) who are not related to someone seeking election (immediate family); and
  - d) who are not voting members of the unit's governing body (i.e.: Executive Board).
3. If an appointed member of the elections committee is unable to fulfill their duty for any reason, the alternate(s) will assume those duties.
4. The Elections Committee is charged with ensuring that elections are conducted in a fair and impartial manner.

### C. Election Requirements



1. Association Nominations. Nominations for office shall be made as follows:
  - a) Any active member, at his/her request, shall have their name placed upon the ballot for an office of the Association;
  - b) The name of the Active member may be placed in nomination by any other Active member with the consent of the nominee;
  - c) Notices and requests for nominations will be given to the general membership so information about the candidates can be disseminated within a
2. Every Active member shall be assured of voting by secret ballot.
3. There shall be at least a fifteen (15) calendar day period between notice of the election and the actual voting.
4. There shall be an all Active member vote. A member who is off-track shall be sent election information by mail to his/her last known residence.
5. The Association shall provide means for all Active members to vote (including vote by mail), and it shall be the responsibility of the member to notify the chapter if s/he desires a ballot at a site other than the regularly scheduled voting place.
6. An Active member shall acknowledge receipt of a ballot by signature on a registration sheet at the time of issuance of the ballot or on an envelope when returning the voted ballot. If a roster of members is prepared for a school site ahead of time, the initials of the member may be accepted.

#### D. Procedural Components

The Elections Committee must determine the following prior to setting the election timeline:

1. Method for the distribution of the Announcement of Vacancy(ies) and Timeline to all members.
  - a) The method must ensure each member is aware of the opportunity to file a declaration of candidacy.
2. Method for the distribution and submission of Declaration of Candidacy(ies):
  - a) Electronic forms are permitted

- b) If using paper forms, provision for the elections committee chairperson or designee to be present to receive a declaration of candidacy by the filing deadline.
- 3. Decide if campaign statements will be distributed by the chapter. If yes, determine the method for submission of Campaign and word/character limit (CTA suggests no less than 30 words).
- 4. Decide if electronic flyers will be distributed by the chapter. If yes, decide on flyer distribution parameters.
- 5. Method for distribution of election guidelines/rules to candidates.
- 6. Method for the distribution of ballots to all eligible voting members, including members on leave, members who work at multiple locations, and members who are off track (year-round system).
- 7. Method for the distribution of election results to leadership, candidates, and members.

E. Announcement

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

F. Timeline

- 1. Schools/Worksites on alternative calendars shall be considered when setting election timelines.
- 2. The timeline for the election shall include dates for:
  - 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 postmarked 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 postmarked 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 shall be made to leadership, candidates, and members, and posted at each work site, which date shall be not later than five (5) calendar days following the counting of ballots;
- l) Dates and timelines for run-off election, if necessary; and,
- m) Deadline for filing of challenges to initial election and run-off if held (date received, not postmarked date).

#### G. Nominations

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

#### H. Withdrawal of Candidacy

- 1. In order for his/her name not to appear on the ballot, any person withdrawing from candidacy may do so only by written request to the chapter's elections committee chairperson prior to the ballots being printed.

#### I. Candidate's Rights

- 1. Privileges extended to one candidate shall be extended to all candidates.
- 2. Each candidate shall receive a copy of the election timeline, procedures, and guidelines.
- 3. Each candidate shall have the right to a list of the names and addresses of work sites and the number of Active members at each site for the purposes of campaigning.

## APPENDIX

## **I. POLITICAL ACTION COMMITTEE**

In order to participate in local school board elections and/or bond elections, any funds donated for such purposes must be collected separately from association dues and held in a separate account. The Fair Political Practices Commission has strict guidelines regarding campaign donations. Correct procedures for forming and operating political action committees can be found in the OTA Guide to Local Political Action Committees, available through the CTA Governmental Relations Division, Sacramento, Telephone: 916/325-1500.

## **II. REPORTING ALLEGATIONS OF SUSPECTED IMPROPER ACTIVITIES**

A person or entity making a protected disclosure is commonly referred to as a whistleblower. Whistleblowers may be bargaining unit members. The whistleblower's role is as a reporting party. They are not investigators or finders of fact, nor do they determine the appropriate corrective or remedial action that may be warranted.

### **Filing a Report**

1. Any person may report allegations of suspected improper activities. Knowledge or suspicion of improper activities may originate from bargaining unit members. Allegations of suspected improper activities may also be reported anonymously.
2. Reports of allegations of suspected improper activities are encouraged to be made in writing so as to assure a clear understanding of the issues raised but may be made orally. Such reports should be factual rather than speculative or conclusory and contain as much specific information as possible to allow for proper assessment of the nature, extent, and urgency of preliminary investigative procedures.
3. Reports may be made to the President, Executive Board Members, or the CTA Executive Director for the Uniserv office.

## **III. WRITTEN DOCUMENT DESTRUCTION POLICY**

Payroll documents will be shredded after five years.

Personal tax auditing documents will be shredded after 7 years.

## **IV. DISCLOSURES OF POTENTIAL CONFLICTS OF INTEREST**

All OTA Executive Board Members will disclose any potential Conflicts of Interest and provide a written statement of certification that none exist.

## **V. OTA SCHOLARSHIPS**

Dependents of OTA members who are contributing to the OTA Scholarship Fund are eligible to apply for an OTA Scholarship for their first year of college education.