

# Irvine Teachers Association Standing Rules

*Adopted December 6, 2016*

## I. Office Procedures

### A. Reimbursements

All requests for reimbursement shall be signed by the President of ITA or his/her designee.

### B. Checking/Savings Accounts

Two (2) signatures shall be required on all ITA checks. The authorized signatures shall be the ITA President, Vice President, Secretary and Treasurer. No signer shall sign a check made out to himself or herself.

### C. Mileage Reimbursement

ITA shall pay the current CTA mileage rate.

## II. Nominations and Elections of Chapter-Wide Elections

### A. Elections Committee

1. There shall be an ITA Elections Committee.
2. The ITA Elections Committee and Chairperson shall be appointed by the ITA President and approved by the Executive Board to which it is responsible, at the beginning of each school year.
3. The Committee should be composed of at least ~~three~~ two 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 ITA member who is either a candidate on the ballot or whose immediate family member is a candidate shall abstain from all election committee activities on that particular ballot.
6. For online votes, the Elections Chair and one committee member shall verify results and count any paper ballots.

### B. Election Requirements

1. The chapter shall ensure that an open nomination procedure is in place (i.e., any member may nominate any member, including himself or herself). The only qualification for office shall be ITA membership.
2. Every ITA member shall be assured of voting by secret ballot.
3. There shall be at least a fifteen (15) calendar day period between notice of election and the actual voting.

4. All ITA members can vote. A member who is off-track or on dues-paying leave shall be sent election information by mail to his/her last known residence and can request a ballot by mail.
5. An ITA voter shall acknowledge receipt of a ballot by signing the voter sign-in sheet at the time of issuance of the ballot, or on an envelope which contains his or her voted ballot.

C. Announcement

1. The announcement of election shall include the offices, length of terms, and the election timeline.
2. The announcement shall be publicized in a manner that ensures every member has an opportunity to file a declaration of candidacy.
3. For NEA-RA Local Delegates Only: An election or secret ballot may be waived and the candidate(s) declared elected, if following a period of open nominations, the number of candidates is equal to or less than the number of positions to be filled.

D. Timeline

1. Schools/Work sites on alternative calendars shall be considered when setting election timelines.
2. The timeline for the election shall include dates for:
  - 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 to publish the list of candidates and the offices sought;
  - f. Date for preparation of ballots;
  - g. Date on which ballots will be distributed;
  - h. Date by which to request a ballot;
  - i. Date(s) when voting will take place;
  - j. Deadline date (date received, not post-marked date), time and place for return of ballots;
  - k. Date, time and place where ballots will be counted, which should be immediately following the deadline for receipt of voted ballots;
  - l. Date that announcement of results shall be made to leadership, candidates, members, and posted at each work site, which date shall be not later than five (5) calendar days following the counting of ballots;

- m. Dates and timelines for run-off election, if necessary; and,
- n. Deadline for filing of challenges to initial election and run-off if held (date received, not post-marked date).

E. Finances and Use of Unit Resources

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

F. Candidate's Rights

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

G. Ballot

- 1. The names of the candidates shall be printed on the ballot in CTA alphabetical order. The name of each candidate shall be as printed on the declaration of candidacy. When a candidate's last name is hyphenated, the name before the hyphen shall be used for placement on the ballot.

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.

- 2. The ballot shall state the name of the office/position, the term, and the names of the candidates.
- 3. The ballot shall include space for as many write-in candidates as there are positions available except in run-off elections.

H. Distribution of Ballots and Methods of Voting

1. Each member shall receive a ballot. Active members who are off-track or on a dues-paying leave shall be notified by mail that they have the opportunity to vote.
2. Voting shall be by one or a combination of the following methods:
  - a. Chapter-wide elections require a locked ballot box.
    1. Each voter must sign a voter sign-in sheet before receiving a ballot. There can be more than one sign-in sheet if ballots are distributed in more than one location.
    2. The marked ballot must be returned to a designated ITA site ballot box.
    3. ITA site representatives must return all voter sign-in sheets and locked ballot boxes to the Elections Committee by the designated date and time. Voter sign-in sheets and ballots from each site must be kept in the locked box until verified by Elections Committee.
  - b. Voting By Mail
    1. A list of current ITA members on leave shall be prepared, which includes name, work site, and home address.
    2. A determination shall be made prior to the election whether the ballots shall be sent to the school/work site or to the home of the member.
    3. Each member on leave who requests a ballot shall be provided
      - A ballot;
      - Instructions for
        - Folding and placing the ballot into the unsigned inner envelope;
        - Placing the unsigned inner envelope into the outer envelope;
        - Signature and school on the outer envelope addressed to the chapter;
      - Deadline date for receipt of the voted ballot at the ITA office
      - A small envelope (Inner envelope) in which to place the voted ballot;
      - A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
    4. At the time of counting, the names on the outer envelope shall be checked against the official list of eligible voting members.
    5. The name on the official list should be marked to show that the voter has returned a ballot.
    6. The outer envelopes shall then be opened and put in a separate stack for safekeeping.

7. All inner envelopes shall be placed in a separate container.
8. All inner envelopes shall be opened and the ballots removed from the envelopes, stacked, and then counted.
9. Refer to section K for the "Counting of Ballots" procedure.

I. Electronic Voting

Electronic voting ~~is only permitted through~~ shall follow the guidelines of the CTA Elections and Credentials Committee and shall have CTA Board approval. See *Requirements for Chapter Elections Procedures*, Section VII.4., page 7 for requirements.

J. Vote Requirements

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

1. A majority vote means the candidate or issue receiving more than half of the legal votes cast.
2. A plurality vote means the candidate or issue receiving the largest number of votes to be given any candidate or issue.
3. A two-thirds (2/3) vote means at least two thirds (2/3) of the legal votes cast,
4. For unit officers, the election will be by majority.
5. For State Council: The election will be by majority vote and will follow the requirements set forth in the CTA Elections Manual. The election for ITA State Council Representatives will be counted and reported by the ITA Elections Committee.
6. If no candidate receives a majority vote, a run-off election shall be conducted among the candidates receiving the highest number of votes. The names on the ballot will be one (1) more than the number of vacancies to be filled.
7. For NEA Local Delegates, the election will be by plurality vote. Results must be sent to the CTA Governance Support Department.
8. An election for NEA Local 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.
9. For NEA State Delegates, the election will be overseen by the Service Center Council. The ITA Elections Committee shall submit to the Service Center Council the official CTA/NEA state delegate election Teller's Report, ballots, Tally Sheets and voter sign-in sheet. The Service Center Council will forward the results to CTA.
10. For additional CTA/NEA election guidelines refer to the official CTA Elections Manual.

#### K. Counting of Ballots

1. The Elections Committee shall verify signature sheets with ballots received, count the ballots, which should be completed immediately following the deadline for receipt of voted ballots.
2. Each office/position on the ballot shall be treated as a separate race.
3. Blank and/or illegal ballots for each office/position shall be set aside. Examples include the following:
  - a. Member not listed on the voter roster;
  - b. Voter's intent unclear;
  - c. Votes cast for more than number allowed;
  - d. Votes cast on unofficial ballot (probably reproduced);
  - e. Candidate is not a member.
4. All of a site's ballots shall be set aside and not counted-when
  - a. there are more ballots than signatures;
  - b. ballot(s) are submitted after deadline;
  - c. there is a voting envelope without a signature; and/or
  - d. ballots that are separated from Roster/Sign-up sheet.
5. The Elections Committee should categorize each illegal ballot, determine whether the vote(s) in that category should be counted separately, as listed in 4 above, and make a note of the decision. The ballots should remain separate.
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. The Teller's Report shall not contain a school-by-school or site-by-site breakdown report.
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-in sheets shall be retained by the unit for one year after the election.

#### L. Observers

1. Each candidate shall be allowed to have one observer, who may be the candidate, at the vote counting site. The candidate shall provide the name of the observer to the Elections Committee before the votes are counted.

2. An observer shall not interfere with the counting and shall stay in the counting area until the President or designee has been notified of the results and has notified each candidate of the results. The observer must maintain the confidentiality of the election process.

#### M. Challenge Procedures

1. A challenge cannot be initiated until after the results of the elections have been posted at each work site.
2. Challenges for election of State Council Representatives, Alternates, State, and Local delegates to NEA RA follow procedures in the CTA Elections Manual.
3. The challenging party(ies) must notify the ITA president and ITA Elections Chair of a challenge in writing within ten (10) calendar days after the announcement of the results of the election. (If the ITA President is a candidate on the ballot, please see item number 5 below.) The notification must be on the official CTA Challenge Form.
4. Upon receipt of the challenge, the ITA Elections Committee will notify all the candidates in the election being challenged that a challenge has been filed. Within ten (10) calendar days after receipt of the challenge, the ITA Elections Committee shall, in accordance with the ITA's bylaws and standing rules, conduct an investigation and determine whether or not the challenge:
  - a. Is a violation of the ITA'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.
  - e. Within the same 10 calendar day period, ITA's Elections Committee shall submit a written report including issues and recommendations to the ITA President and the Executive Board.
5. Any member of the Executive Board who was a candidate in a race that is challenged, or whose immediate family member is such a candidate, shall abstain from voting on the report. If, in the case where the majority of the ITA Executive Board is unable to act on the challenge, the decision shall move to the ITA Representative Council.
6. The ITA Executive Board shall act on the report no later than ten (10) calendar days following receipt of the written report of the Elections Committee in accordance with CTA Challenge Procedures as described in the CTA Elections Manual. The Executive Board must issue its decisions in writing to the challenger and the Elections Committee Chair.
7. If the ITA Executive Board fails to act within ten (10) calendar days of the initial challenge, the individual may file an appeal as described below by writing to the CTA President.
8. If the challenging party(ies) wish(es) 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 governance body to the CTA President. The appeal shall be the original challenge filed at the unit level, and additionally shall include the ITA Elections Committee report and the ITA Executive Board's decision.

9. 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.

#### N. Initiative Procedures

1. The ITA membership shall have the authority to make decisions on any matters affecting the Association or its activities through the initiative process.
2. An ITA 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 ITA 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 ITA members. The petition shall contain the question proposed to be placed on the ballot.
5. The circulators shall present to the ITA President the petition(s) containing original signatures.
6. The ITA 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 3 calendar days that the petition failed for a lack of signatures.
8. The ITA President shall cause a ballot to be furnished to the ITA 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.

#### O. Referendum Procedures

1. Any action or proposed action of the ITA Representative Council or the ITA Executive Board shall be referred to a vote of the ITA membership upon two-thirds vote of the referring body at any valid meeting.
2. The referendum action shall prescribe the exact wording of the question to be posed to the ITA membership on the ballot.

3. The ITA president shall cause a ballot to be furnished to the Active members no less than 15 calendar days after action by the referring body, provided that the period that school is officially not in session shall not be included in this count.
4. Regular election procedures (e.g., election of officers) shall be followed including voting times.
5. The proposal shall take effect immediately upon receipt of the required number of votes, unless otherwise specified.

P. Recall Procedures

1. The ITA membership shall have the authority to recall from office any person or persons having been elected thereto by the ITA members.
2. Any Active member(s) desiring to recall an ITA or other elected office holder must file a copy of a petition with the chairperson of the ITA Elections Committee before it can be circulated.
3. The petition must include the following information:
  - a. Name of individual who is the subject of the recall;
  - b. Office of individual;
  - c. Date of petition;
  - d. Name(s) of person(s) filing petition;
  - e. Notation that "Each signature must be in ink"; and,
  - f. Space must be provided for the printed name, signature, work site and date of signing for each name on the petition.
4. Within fourteen (14) working days after receipt, the chairperson of the ITA 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 ITA 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.
5. The Chairperson of the ITA Elections Committee shall send written notification to the ITA officer whose recall is being proposed and shall also notify the other ITA officers and other members of the ITA Executive Board. A copy of the petition shall be enclosed.
6. Monies from ITA's treasury or indirect contributions in the form of use of a unit's assets, facilities, staff, equipment, mailings, good will and credit, or in-kind services must not be used in the recall process.

7. No unit may state or indicate its preference in the unit's newspaper, newsletter or communications to its members.
8. The timeline for gathering of signatures will commence the day that the notice of intent is registered.
9. A maximum of sixty (60) calendar days shall be permitted to obtain the signatures of at least twenty-five percent (25%) of the Active members of the chapter. If the person subject to the recall was not elected by the general membership, then the signature requirement is twenty-five percent (25%) of the members of the electing constituency.
10. The signed petitions must be received by the chairperson of the ITA Elections Committee by the specified deadline date.
11. The ITA Elections Committee shall have ten (10) calendar days after receipt of the petition to verify signatures.
12. If there are insufficient signatures, the chairperson of the ITA Elections Committee shall notify the petition circulator(s) by mail within five (5) calendar days of verifying the signatures that the petition failed for a lack of signatures.
13. 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.
14. The ITA President, or the ITA Vice President if the ITA President is the person being recalled, shall cause a ballot to be furnished to ITA members no less than twenty (20) calendar days after verification of signatures. The period that the IUSD Traditional School Calendar is officially not in session shall not be included in this count.
15. The election must be concluded within fifteen (15) calendar days of distribution of the ballots.
16. The election must be conducted with provisions for a secret ballot and voter sign-up sheets.
17. The election shall be certified in accordance to the unit's bylaws.
18. The Chairperson of the ITA Elections Committee will deliver the report to the ITA President 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.

#### Q. Contract Ratification Election

1. Upon determination by the Executive Board that a tentative contract agreement has been reached, the Board shall decide by which of the following two (2) methods the ratification election shall be conducted:
  - a. Site voting
  - b. Vote by mail
2. The election shall be held at the first opportunity after tentative agreement is reached when both traditional and year-round schools are in session.

3. There shall be a minimum of fifteen (15) days between the notice of election and the voting. During this period, ITA shall hold at least one general meeting for the bargaining unit to discuss the tentative agreement.
4. The method of election shall comply with established election procedures.
5. Ratification shall require a 50% + 1 vote of the votes cast.

### III. Site Elections for Site Representatives

#### A. Election Requirements

1. Site Representatives shall be elected yearly following an open nomination procedure. Any member may nominate any other member, including himself or herself. The only qualification is that the Site Rep must be an ITA member.
2. Every member shall be assured of voting by secret ballot.
3. There shall be at least a fifteen (15) calendar day period between the notice of the election and the actual voting.
4. All ITA members can vote. A member who is on dues-paying leave shall be notified of an upcoming election. Upon request, members on leave can vote by mail.
5. The election will be run by the current Site Rep unless that rep is running for re-election. In that case, any other member at the site can host the election.

#### B. Announcement

1. The announcement of the election shall be publicized in a way to ensure every member has an opportunity to declare his or her candidacy.
2. The dates and location(s) for voting should be publicized. There should be at least 3 days of voting opportunities.
3. Election or secret ballot may be waived and the candidate(s) declared elected if following a period of open nominations, the number of candidates is equal to or fewer than the number of positions to be filled.

#### C. Voting

1. The ballot should contain as many write-in lines as there are openings.
2. ITA can prepare and copy the ballots for the site upon request. Also, upon request, a site can use its locked ballot box for a site rep election. The vote administrators can then come to the ITA office to have the box opened and to count ballots.

3. ITA will provide the sign-in sheet for each member to sign upon receiving a ballot.
4. The votes will be counted by at least two members, neither of whom is a candidate, and the results will be announced to the staff and the ITA office within a day of the counting.
5. The ballots and sign-in sheet will be submitted to the ITA office with the tally sheet of results.
6. The newly elected site rep(s) will complete and send to the ITA office a form with contact information provided.
7. As an option, a site can use the double-envelope method of voting.
  - a. A list of current ITA members shall be prepared, which includes each member's name and school/work address.
  - b. The voter shall be provided with the following:
    - A ballot;
    - Instructions
      - Folding and placing of the ballot into the unsigned inner envelope;
      - Placing of the unsigned inner envelope into the outer envelope;
      - Signature and school on the outer envelope addressed to the chapter;
    - Deadline date for receipt of the voted ballot at the ITA office
    - A small envelope (inner envelope) in which to place the voted ballot;
    - A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
  - c. At the time of counting of the ballots, the names on the outer envelope shall be checked against the official list of voters. The name on the official list shall be marked to show that the voter has returned a ballot.
  - d. The outer envelope shall then be opened and put in a separate stack for safekeeping as a record of voters.
  - e. All inner envelopes shall be placed in a separate receptacle.
  - f. The inner envelopes shall be slit and the ballots removed from the envelopes, stacked and then counted.
  - g. Refer to Article II, section K for the "Counting of Ballots" procedure.

#### IV. ITA PAC

##### A. Interview Process

1. A letter shall be sent to school board candidates inviting them to set an appointment for an interview.
2. All interested candidates shall be interviewed.
3. The Committee shall report the interview results to the Executive Board and make a recommendation to the ITA Representative Council.
4. Approval of the Committee's recommendation by the Representative Council shall require a minimum of 60% of the total votes cast, favoring the recommendation for the endorsement to be ratified.
5. Upon approval by the Representative Council, the ITA PAC may issue recommendation letters or statements of recommendation, including rationale for the recommendation, for press releases, campaign materials, and member education. The preceding interview process may be waived in the event that the ITA PAC makes a recommendation to the Executive Board to do a friendly endorsement of incumbent candidates.

##### B. Friendly Endorsement of Incumbent Candidates

1. Approval of the Committee's recommendation by the Representative Council shall require a minimum of 60% of the total votes cast, favoring the recommendation.
2. Upon approval by the Representative Council, the ITA PAC may issue recommendation letters or statements of recommendation, including rationale for the recommendation, for the purposes of press releases, campaign materials, and member education.

##### V. Conference Attendance

Any member who fails to attend a conference, as well as its workshops and sessions, for which he/she has registered shall reimburse ITA for any expenses incurred by ITA.