

## **STANDING RULES**

**Revised & Adopted by SDEA Board on May 22, 2024**

(Unless otherwise noted, Board of Directors refers to the SDEA Board of Directors)

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STANDING RULE 1.0

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STANDING RULE 1.1

HEADQUARTERS

The Headquarters office of the San Diego Education Association shall be located at 10393 San Diego Mission Road, Suite 100, San Diego, California. (8/15/73) (11/8/78)

STANDING RULE 1.2

ELECTRONIC SIGNATURES

- a. The use of electronic signatures shall be authorized on all disbursement warrants.
- b. The authorized electronic signatures shall be two of the three positions: President, Treasurer and Executive Director. (8/21/68) (11/8/78) (6/7/23)

### STANDING RULE 1.3

#### FISCAL YEAR

The fiscal year of the Association shall commence on September 1 and end on August 31. (8/6/75)  
(11/8/78)

### STANDING RULE 1.4

#### BONDING OF OFFICERS AND EMPLOYEES AND AUDIT

- a. The Executive Director, corporate officers and all employees of the Association shall be placed under a bond in such amount as the Board of Directors may determine. (8/6/75)
- b. The accounts and other financial records of the Association shall be audited annually by an independent certified public accountant or accounting firm, to be designated by the Board of Directors. (8/6/75)

### STANDING RULE 1.5

#### ATTENDANCE AT OUT-OF-TOWN CONFERENCES AND FUNCTIONS

- a. The Board of Directors shall authorize official membership attendance at all out-of-town functions and meetings. (9/1/68)
- b. Any SDEA delegate to a conference whose expenses have been partially or fully paid by the Association shall make an oral or written report at the request of the Board of Directors. (7/27/66) (3/9/88)
- c. Committees sending delegates to out of town conferences must show such decisions in official committee minutes. Such decisions shall be within the committees' budgets subject to 1.6.a. (3/9/88) (11-28-07)

### STANDING RULE 1.6

#### **EXPENSE REIMBURSEMENT**

- a. It is policy of the San Diego Education Association to reimburse members and employees who represent the Association in an official capacity for actual and necessary expenses not to exceed the Board of Directors adopted amounts for reimbursement. (9/1/65) (11/28/07)
- b. All expenses shall be itemized, in detail, on claim forms furnished by the Association. (9/1/65)

- c. Meals - actual amounts paid; not to exceed \$40 per meal including tax and tips. No alcoholic beverages will be reimbursed. (3/9/88) (9/27/23)
- d. Receipts must accompany claims for plane, train, bus, hotel or motel and meals. (3/9/88) (3/16/70)
- e. Reimbursement shall be made in the following:
  - 1. Travel
    - Plane: Actual coach fare. (3/16/70) (3/9/88)
    - Train or Bus: Actual coach fare. (3/16/70) (3/9/88)
    - Auto: Current IRS approved rate, roundtrip by the shortest highway route; however, mileage reimbursement cannot exceed the cost of plane fare. (3/16/70) (11/8/70) (3/9/88) (11-28-07)
    - Actual costs of transportation to and from the airport. (3/16/70) (3/9/88) (9/27/23)
  - 2. Lodging (hotel/motel)
    - Actual cost of-room. (6/7/23)

If travel by private car means an extra hotel or motel charge, such charge is not reimbursable. (11-28-07)

Personal charges, such as tips to hotel staff, laundry, portage, valet, telephone calls and entertainment are not reimbursable. (3/9/88) (9/27/23)
- f. Any exceptions or variations from the rules covering travel and other expenses shall be allowed only by authorization within supplemental policies adopted by the Board of Directors.
- g. All persons traveling for the Association shall carpool whenever this is possible in order to receive mileage reimbursement. (11/8/78)(3/9/88)
- h. All out-of-state travel, which is reimbursable from Association funds, shall be approved in advance by the Board of Directors. (10/12/68) (3/9/88)
- i. The President and Treasurer shall review and authorize the expenses of the Executive Director. The Executive Director shall review and authorize the expenses of the staff. (9/25/68) (3/9/88) (11/28/07) (6/7/23)

## STANDING RULE 1.7

### FISCAL POLICY FOR EXPENDITURE OF FUNDS

- a. It shall be the policy of the San Diego Education Association to secure prior approval from the Board of Directors for non-budgeted general fund expenditures that exceed \$500.00.
- b. The Executive Director and President shall be empowered to approve general fund expenditures of less than \$500.00. However, said expenditures shall be brought to the next regularly scheduled SDEA Board of Directors' meeting for general ratification.

In cases of emergency, the Executive Director and the Treasurer are empowered to make non-budgeted general fund expenditures in an amount not to exceed \$1,000.00. Said expenditures shall be brought to the next regularly scheduled SDEA Board of Directors' meeting for ratification. (3/12/80) (11-28-07)

## STANDING RULE 1.8

### SDEA BUDGET

- a. Budget hearings will be held yearly with the Treasurer serving as chair. Hearings will be open to all members for input. Hearings may be held at various locations. Hearings will be concluded in time for a preliminary budget to be presented to Representative Council for adoption on or before the last Representative Council meeting of the school year. (11-28-07)
- b. The budget shall be sent to the Representative Council Representatives two weeks prior to the May meeting. (3/12/80) (11-28-07)

## STANDING RULE 2.0

### PERSONNEL, OFFICERS, BOARD OF DIRECTORS AND STAFF

#### 2.1 Release Time for SDEA Officers

#### 2.2 Duties of the President

#### 2.3 Duties of the Vice President

#### 2.4 Duties of the Secretary

#### 2.5 Duties of the Treasurer

#### 2.6 Board of Directors Meeting Procedure

#### 2.7 Powers and Duties of the Board of Directors

## 2.8 Equal Employment Opportunity

## 2.9 Conditions of Employment for Professional Staff

## 2.10 Executive Director

### STANDING RULE 2.1

#### RELEASE TIME AND COMPENSATION FOR SDEA OFFICERS

- a. The President shall be a full time twelve-month President, released from responsibilities with the San Diego Unified School District. The President shall be paid at the daily pro-rata salary pursuant to their placement on the teachers' salary schedule times 248 days. The President shall receive health and welfare benefits and retirement benefits at least at the same level as those provided to twelve-month District employees within the Association bargaining unit.

The President shall receive twenty days of vacation per year, and all holidays granted to twelve-month District employees within the Association bargaining unit.

The President shall suffer no loss in benefits, salary, sick leave, or other employment guarantees as a result of his/her service as President of the Association. (11-28-07)

- b. The Vice President shall be paid a monthly stipend of no less than \$200 per month as determined by the budget process. (11-28-07)

The Vice President may be released at the discretion of the Board of Directors. (3/9/70)  
(11-28-07)

The Vice President shall suffer no loss in benefits, salary, sick leave, or other employment guarantees as a result of his/her service as Vice President of the Association. (11-28-07)

- c. The Secretary shall be paid a monthly stipend of no less than \$100 per month as determined by the budget process. The Secretary shall suffer no loss in benefits, salary, sick leave, or other employment guarantees as a result of his/her service as Secretary of the Association. (11-28-07)

- d. The Treasurer shall be paid a monthly stipend of no less than \$100 per month as determined by the budget process. The Treasurer shall suffer no loss in benefits, salary, sick leave, or other employment guarantees as a result of his/her service as Treasurer of the Association. (11-28-07)

### STANDING RULE 2.2

#### DUTIES OF THE PRESIDENT

- a. The President shall serve as Chairperson of the Representative Council and Board of Directors, and shall preside at all meetings of these bodies. (3/11/64)
- b. The President shall call special meetings of the Board of Directors, Representative Council and the Association as provided in the Constitution and Bylaws. (8/15/73)
- c. The President shall be an ex-officio member of all Association committees, whether continuing or temporary, except the Election Committee, and shall receive notice of all committee meetings. (10/12/68) (11/8/78) (11-28-07)
- d. Upon election to office, the President shall immediately begin to secure nominations from the general membership toward filling committee vacancies. This shall be done in accordance with policies and procedures governing standing committees as contained in the Constitution, Bylaws and Standing Rules. (8/21/74) (11/8/78)
- e. The President shall appoint a parliamentarian and alternate parliamentarian for the Representative Council. (11/8/78) (3/9/88)
- f. The President shall regularly report to the Board of Directors and Representative Council, accomplishments and status of current issues and submit an annual report of Association activities at the last regularly scheduled meeting of the Representative Council. (3/11/64) (11/8/78)
- g. The President shall deliver an annual State of the Association report.
- h. The President may delegate, as needed, to other officially constituted members of the Association, the authority to speak or act on the President's behalf, but the President remains responsible for the stands taken by the president's representatives when they are acting on the President's behalf. (3/11/64) (11/8/78)
- i. The President shall appoint chairpersons of the Association action bodies with the concurrence of the Board of Directors. (9/21/74) (11/8/78) (11-28-07)
- j. The President shall develop a yearly visitation schedule to schools. (8/21/74) (11/8/78) (3/9/88)
- k. The President shall enunciate new policies and programs of the Association as directed by the Board of Directors. (3/11/64) (11/8/78)
- I The President, or designated representative, shall serve as the official representative of the Association, along with the Executive Director. (4/26/69) (11/8/78)
- m. The President shall, in consultation with the Executive Director, nominate SDEA members to joint district and community committees with the concurrence of the Board of Directors. (3/11/64) (11/8/78)
- n. The President shall be authorized to countersign checks with the Executive Director and/or Treasurer of SDEA. (3/11/64) (11/8/78)
- o. The President shall perform such other duties as may be directed by the Board of Directors, or provided for elsewhere in the Constitution, Bylaws and Standing Rules of the Association. (3/11/64) (11/8/78)
- p. The President shall coordinate, in conjunction with the Executive Director, the activities of

- the Association. (8/21/74) (11/8/78)
- q. Communications and Public Relations:
1. The President shall present, represent and interpret the Association and its program to the membership and the public. (2/11/69) (11/8/78)
  2. The President is responsible for all official Association publication and press releases. (2/11/69) (11/8/78)
  3. The President shall be responsible for the planning and execution of the Public Relations Program of the Association. (2/11/69) (11/8/78)
  4. The president may designate staff or SDEA members as ad hoc public spokespeople. (6/7/23)
- r. The President shall perform all duties as described in the Bylaws. (11-28-07)
- s. The president shall bring recommendations to the Board of Directors of members to serve on Labor Council. (6/7/23)

### STANDING RULE 2.3

#### DUTIES OF THE VICE PRESIDENT

- a. The Vice President of SDEA shall be an ex-officio member of the Membership Committee. (8/21/74) (11-28-07)
- b. The Vice President shall serve as ex-officio without right to vote on all Association Committees. The Vice President shall not be a member of the Elections Committee. (8/21/74) (11/8/78) (3/9/88) (11-28-07)
- c. The Vice President shall serve as a member of any subgroup of the Board of Directors in negotiations with the professional staff or their representative. (8/21/74) (11/8/78).
- d. The Vice President shall perform all duties as described in the Bylaws.

### STANDING RULE 2.4

#### DUTIES OF THE SECRETARY

- a. The Secretary shall be responsible for reading and editing the minutes of all the proceedings of the Association as soon as possible after each meeting. (4/26/69) (11/8/78)
- b. The Secretary shall perform all duties as described in the Bylaws. (4/26/69) (11-28-07)
- c. The Secretary shall be responsible for a quarterly report to the Board of Directors

regarding the status of motions. (8/21/74) (11/8/78) (3/9/88)

- d. The Secretary shall be responsible for reporting to the proper body any inconsistencies between SDEA documents. (2/13/80) (3/9/88)
- e. The Secretary shall be responsible for the minutes of each meeting to be typed and submitted to the SDEA office for filing and. (5/20/75) (11/8/78) (3/9/88) (11-28-07)
- f. The Secretary shall be responsible for minutes to reflect any vote to send any delegate to a conference. (3/9/88)
- g. The Secretary shall serve as a member of any subgroup of the Board of Directors in negotiations with the professional staff or their representative. (8/21/74) (11/8/78)

#### STANDING RULE 2.5

##### DUTIES OF THE TREASURER

- a. The Treasurer shall perform all duties described in the Bylaws. (08/24/74)
- b. The Treasurer shall serve as a member of any subgroup of the Board of Directors in negotiations with the professional staff or their representative. (8/21/74) (11/8/78)

#### STANDING RULE 2.6

##### BOARD OF DIRECTORS MEETING PROCEDURES

- a. The President, in consultation with the Executive Director, shall prepare the agenda for Board of Directors' and Representative Council meetings. (5/31/89)
- b. Members of the Board of Directors may submit agenda items for any regularly scheduled Board of Directors meeting by submitting such items to the President or Executive Director no later than 5:00 PM Monday preceding the meeting date. Items submitted after this deadline shall require a two-thirds vote of the Board of Directors for consideration. (5/31/89) (11-28-07)
- c. Minutes of the SDEA Board of Directors shall be made available to the Secretary for editing as soon as practical, after each meeting, and distributed to the members of the SDEA Board of Directors along with the Agenda for the next regularly scheduled meeting. (10/12/68) (11/8/78)
- d. Except by a two thirds vote, meetings of the Board of Directors shall commence at 4:30 PM unless a meeting announcement setting forth alternative starting times has been received by board members forty-eight hours in advance of the meeting. (5/31/89)

- e. The reports by the President, Secretary, Treasurer and Executive Director are to be informational reports and not require action. (9/1/65)
- f. Action items, which are not acted upon during a meeting, shall appear as on the next agenda. (9/1/65)
- g. Requests for action from any SDEA committee shall be placed as an item of business on the next regularly scheduled or special Board of Directors meeting agenda. Such items must be considered by the Board of Directors at the meeting for which the item has been scheduled. (11/8/78)
- h. Generally, before the SDEA Board of Directors take action on any of the following types of motion, they refer such items to the Political Action Committee for consideration:
  - 1) Endorsement of candidates in political campaigns;
  - 2) Seeking of funds for candidates in political campaigns;
  - 3) Support or opposition of legislation and ballots propositions. (1/16/74)
- i. The President shall appoint Board of Director Liaisons to the standing committees. (3/9/88)
- j. Board of Director Liaisons shall serve as official members of the committee to which they are appointed. (3/9/88)

STANDING RULE 2.7  
 POWERS AND DUTIES OF THE BOARD OF DIRECTORS

The powers and duties of the Board of Directors shall be as set forth.

- a. The duties and the responsibilities of the Board of Directors 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 of the Association, subject to policies established by the Representative Council;
  - 4. Approve appointment and removal of bargaining team members;
  - 5. Recommend a budget for the Association to the Representative Council;
  - 6. Approve all appointments to committees, including chairpersons;
  - 7. Adopt the Standing Rules for the Association;
  - 8. Adopt grievance procedure;
  - 9. Direct the grievance activities of the Association;
  - 10. Hire, direct the evaluation of staff, direct and terminate staff in accordance with negotiated contracts and standing rules;

11. Prepare and submit to the Representative Council the annual budget for the coming year no later than the last regular meeting of the Representative Council for the current school year;
12. Direct the negotiations between the Association and its staff;
13. Ratify the negotiated Agreement between the Association and the Staff;
14. Be responsible for the formation and distribution of the Association's calendar of activities in conjunction with the Vice President;
15. Perform such other duties and responsibilities as are appropriate and in conformance with the governance documents.
16. The Board of Directors may conduct executive sessions during which discussions shall be exclusively limited to:
  - 1) Hiring, firing and/or evaluation of Association staff;
  - 2) Personnel cases or grievances involving members and the District;
  - 3) Strategy and tactics related to bargaining;
  - 4) Litigation;
17. Shall direct all representation to the administration and Board of Education.
18. 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.

#### STANDING RULE 2.8

#### EQUAL EMPLOYMENT OPPORTUNITY

The San Diego Education Association hereby affirms its belief that every person regardless of race, color, creed, national origin, gender, sexual orientation, political affiliation, marital status, age, or membership and participation in any activities of a union has the right to equal opportunity for employment. To this end, the Association pledges its active commitment to operating its own employment practices to insure itself as an equal opportunity employer and actively seeks under represented group candidates for Association staff vacancies as they occur. (11/14/73) (11/8/78)

#### STANDING RULE 2.9

#### CONDITIONS OF EMPLOYMENT FOR PROFESSIONAL STAFF

##### Negotiation Rights:

- a. The San Diego Education Association agrees to negotiate with representatives of the professional staff in good faith and on all subjects that are related to employment conditions. (2/11/69) (11/8/78)

- b. The Executive Director shall be designated the representative of the SDEA Board of Directors in negotiating with the staff, and shall meet with representatives of the professional staff at reasonable times and places. He/she will be held accountable for the administration and enforcement of this Standing Rule. (2/11/69) (11/8/78)
- c. In the event negotiations reach an impasse, the issues in dispute shall be submitted to mediation pursuant to the Agreement between the SDEA/CTA/NEA and the SDEA staff organization CSO/NSO (SDEO) (11-28-07)
- d. In the event mediation fails, representatives of the professional staff may appeal their case directly to the Board of Directors. (2/11/74) (11/8/78)
- e. Upon favorable adoption by both parties, the agreements shall be reduced to writing and shall become contractually binding and operable for the ensuing fiscal year. Negotiations shall be automatically resumed in the event the professional staff or a majority of the Board of Directors fail to adopt the agreements. (2/11/69) (11/8/78)

STANDING RULE 2.10

EXECUTIVE DIRECTOR

- a. The Executive Director of SDEA shall serve as the Executive officer of the Association, and shall be responsible for implementing all Association policy under the direction of the Board of Directors. He/she does not make policy, but provides appropriate guidance in its establishment. Once policy has been made, he/she is responsible for its implementation. (2/11/69) (11/8/78) (11-28-07)
- b. Guidance and Leadership:
  - 1. The Executive Director shall provide leadership and guidance in the development and execution of the entire program of the Association. This shall include a master calendar for the Association. (4/26/69) (11/8/78) (11-28-07)
  - 2. The Executive Director is responsible for providing resources and research assistance to the Board of Directors, Representative Council and Committees of the Association. (2/11/69) (11/8/78) (11-28-07)
  - 3. The Executive Director shall propose to the Board of Directors and Representative Council such activities and programs as he/she considers pertinent to the advancement, welfare and objectives of the Association. (2/11/69) (11/8/78) (11-28-07)
  - 4. The Executive Director shall assist in the development of in-service training for actual, and potential leaders, when in-service training is being planned or implemented (2/11/69) (11/8/78) (11-28-07)
- c. Business and Office Management:
  - 1. The Executive Director shall be responsible for the management of the office and staff. (2/11/69) (11/8/78) (11-28-07)
  - 2. The Executive Director is responsible for the expenditure of Association funds under

direction of the Board of Directors. He/she shall keep the Board of Directors and Representative Council informed of the organization's financial standing. (2/11/69) (11/8/78)

3. The Executive Director is responsible for the employment of the clerical staff. He/she recommends for professional staff appointments and reappointments. (2/11/69) (11/11/8/78) (11-28-07)
4. The Executive Director, in consultation with the treasurer, shall prepare the preliminary annual budget of the Association. (2/11/69) (11/8/78)

d. Representation of the Association:

1. The Executive Director shall coordinate, in coordination with the President and the Board of Directors, all representation to the SDUSD administration and Board of Education. (2/11/69) (11/8/78) (11-28-07)
2. The Executive Director shall be responsible for developing and implementing a negotiations program in conjunction with the Board of Directors. (2/11/69) (11/8/78) (11/28/07)
3. The Executive Director shall serve or provide liaison with professional education organizations, including state and national meetings. (2/11/69) (11/8/78)

e. Communications and Public Relations:

1. The Executive Director, in conjunction with the President, is responsible for all official Association publications and press releases. (2/11/69) (11/8/78)
2. The Executive Director, in consultation with the President, shall be responsible for the planning and execution of the public relations program of the Association. (2/11/69) (11/8/78) (11/28/07)

f. Counselor (Member):

1. The Executive Director shall provide counsel, advice and representation to individual members. (2/11/69) (11/8/78)

STANDING RULE 3.0

MEMBERSHIP AND DUES

- 3.1 Membership Year
- 3.2 Membership Assessments — Solicitations
- 3.3 Dues Refund
- 3.4 Economic Services
- 3.5 Dues Collection Procedures

#### STANDING RULE 3.1

##### SDEA MEMBERSHIP YEAR

The membership year of the Association shall begin September first (1) and continue through August thirty-first (31<sup>st</sup>) of the following year. Dues shall be delinquent for a member on December thirty-first (31<sup>st</sup>) of the current membership year unless fully paid in cash or being paid under a valid payroll deduction authorization that the member has executed and filed with the employer or SDEA that will result in the collection of full dues prior to the end of the membership year. Members whose dues are declared delinquent shall be dropped from the membership rolls and, as of that date, membership rights will cease. (5/14/80)

#### STANDING RULE 3.2

##### MEMBERSHIP ASSESSMENTS —SOLICITATIONS

The membership shall be solicited for funds only when it is established that the use of the funds is directly connected with the business of SDEA, CTA or NEA. (6/10/67) (11/8/78)

#### STANDING RULE 3.3

##### DUES REFUND

There shall be no refund on a member's dues at any time. (9/1/65) (11/8/78)

#### STANDING RULE 3.4

##### ECONOMIC SERVICES

SDEA shall not support any economic service in whole or in part by SDEA dues. (10/23/68)  
(11/8/78)

#### STANDING RULE 3.5

##### DUES COLLECTION PROCEDURES

- a. Any member of the bargaining unit may join the United Teaching Profession (SDEA/CTA/NEA) by full cash payment or by signing the proper dues deduction authorization cards. (5/14/80)
- b. During the year teachers who are enrolling for the first time may join the UTP by full cash payment or payroll deduction. The dues must be prorated for the balance of such membership year. (5/14/80)
- c. All membership services are available immediately upon joining SDEA other than those needed for preexistent conditions. Services for such conditions shall be determined on an individual case basis by the Board of Directors of SDEA. (5/14/80)

#### STANDING RULE 4.0 COMMITTEES

##### AND TASK FORCES

##### 4.1 Duties of Chairpersons

##### 4.2 AR/CR Duties

##### 4.3 Grievance Steering Committee

##### 4.4 Guidelines for SDEA Committee Expenditures

#### STANDING RULE 4.1 COMMITTEE

##### CHAIRPERSONS

- a. Duties of Committee Chairperson:
  1. Establish meeting dates and cause each member to be notified one to two weeks in advance of each meeting. (5/20/75) (11/8/78)
  2. Prepare an agenda for each meeting. (5/20/75) (11/8/78)
  3. Shall receive prior approval from the President or Executive Director to schedule room facilities in the SDEA building. Notify the SDEA staff at least two weeks in advance of the time and place for each meeting. (5/20/75) (11/8/78)
  4. Maintain a file of sign-in sheets of members and guests at each meeting. (5/20/75) (11/8/78)
  5. Bring official actions and recommendations of the committee to the Board of Directors: (5/20/75) (11/8/78) (3/9/88)

6. By the end of May, provide a summary report on committee activity for the year to be filed with the official minutes. (5/20/75) (11/8/78)
7. Include with the summary report an official list of all members with the number of meetings held and the number of meetings attended by each member. (5/20/75) (11/8/78)
8. Prepare articles for the Advocate when appropriate. (12/7/77) (11/8/78)

#### STANDING RULE 4.2

#### ASSOCIATION REPRESENTATIVE/COUNCIL REPRESENTATIVE

- a. The primary duty of the Association Representative (AR) and the Council Representative (CR) is that of an informational link between SDEA and the school faculty. It is the AR's and CR's responsibility to communicate individual and collective interests and concerns of the faculty to SDEA. Likewise, it is the responsibility of the AR and the CR to relay SDEA's actions and decisions that are crucial to our profession.
- b. AR Duties
  1. Shall be the official Grievance representative for site enforcement of the contract for teachers. (11/8/78)
  2. Shall assure due process for teachers in the Grievance procedure. (11/8/78)
  3. Shall undergo extensive training to understand the contract and teachers' rights. (11/8/78)
  4. Shall file a Level One (level 2, if appropriate) Grievance when requested. (11/8/78) (05/25/11)
  5. Shall represent all bargaining unit members at his/her site/program in accordance with SB 160 (Rodda). (11/8/78)
  6. Shall attend meetings of the Representative Council and workshops relating to their function. (10/10/79)
  7. Conduct monthly site meetings

8. Develop and update SDEA bulletin board at site.
  9. Supervise SDEA mandated elections.
  10. Distribute information items:
    - a. SDEA Advocate
    - b. Bargaining Updates
    - c. Election Information
  11. Recruitment of new members
  12. Be an advocate for the Association
  13. Serve as a member of site governance team, and other assignments required by the Collective Bargaining Agreement.
  14. Assist site in determining if a contract waiver is needed for a restructuring plan.
- c. CR Duties
1. Shall attend all regular and special meetings of the Representative Council and shall notify their designated alternate if they cannot attend.
  2. Shall present to the Representative Council all matters referred to them by members at their work location.
  3. Shall promote good public relations in matters pertaining to the SDEA/CTA/NEA.
  4. Shall interpret the SDEA/CTA/NEA position to members at their work location.
  5. Shall call meetings at their work location in order to report and discuss all Association business.
  6. Shall be responsible at their work location for the performance or delegation to others of the following duties:
    - a. Posting of materials from the SDEA/CTA/NEA teaching profession.
    - b. Handling of Association business at the site.
  7. Shall serve as liaison between their constituents and the Representative Council.
  8. Shall report to their constituents all actions and policies of the Representative Council.

9. At work locations having two (2) or more representatives, one (1) shall be designated to carry the primary responsibility for the performance of duties listed in 5 and 6 above.
10. Involve SDEA members in Association activities and actively recruit members.

d. AR's and CR's Additional Involvement

1. Conduct constant and ongoing liaison between the Representative Council and the Active members of the faculty unit;
2. Serve as the official channel through which written communications and publications can be easily and quickly transmitted between the Association and the members;
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. Perform such additional duties as prescribed by the Board of Directors;
5. Join and participate in SDEA committees; and
6. Utilize SDEA staff for information and problem solving.

STANDING RULE 4.3

GRIEVANCE STEERING COMMITTEE

- a. The Committee shall be appointed by the President, subject to concurrence by the Board of Directors. The Chairperson votes only in case of a tie. (11/8/78) (10/10/79) (11/28/07)
- b. The Committee shall assist in surfacing Level One grievances and shall serve in an advisory capacity to the Association Representatives. (11/8/78)
- c. The Committee shall plan and provide for Association Representatives training and may excuse attendance from the training sessions. (11/8/78)
- d. The Committee shall be made aware of all arbitration cases and joint recommendations should be made to the Board of Directors whenever feasible. (11/8/78)

- f. The Committee shall have access to officially filed grievances, which shall be maintained, at the SDEA office. Records shall be available for scheduled meetings so long as the right of privacy of grievant(s) shall not be violated. (11/8/78)
- g. The Committee shall identify inadequate sections of the contract so that recommendations for corrections can be made to the Bargaining Committee. (11/8/78)
- h. The Committee shall provide input in support of the publicity for the contract enforcement program as requested by the Executive Director. (11/8/78)

#### STANDING RULE 4.4

#### GUIDELINES FOR SDEA COMMITTEE EXPENDITURES

- a. At the annual SDEA budget hearings, each SDEA committee for which a specific budgeted amount is to be considered in the budget establishment process shall present an outline of the committee's standing responsibilities and proposed goals and objectives for the subsequent Association fiscal year. Accompanying the outline shall be a funding proposal request delineating estimated expenditures to carry out the proposed committee responsibilities, goals and objectives for the subsequent fiscal year. (2/13/80)
- b. In the fiscal year for which a final budgeted amount has been adopted, SDEA committees, before making any expenditures, shall file for approval from the Board of Directors an outline of standing responsibilities, goals and objectives for which the budgeted amount may be expended within the fiscal year. (2/13/80)
- c. The Board of Directors retains the right to control funding of expenditures, which are contrary to the interests of the Association. (2/13/80)
- d. Committee requests for funding which have not been budgeted shall be made directly to the Board of Directors in accordance with the timeline identified in Standing Rule 2.6. (1/13/80)

## STANDING RULE 5.0 SDEA

### INTERNAL MATTERS

- 5.1 Election Rules
- 5.2 SDEA Recognition

## STANDING RULE 5.1

### ELECTION RULES

- a All elections will be conducted according to the SDEA Election Procedures , and every candidate for an SDEA or affiliate election position will be furnished a copy of these rules by the Elections Chairperson (or his/her designee) (3/20/74) (2/13/80) (5/25/11)

## STANDING RULE 5.2 (11/28/07)

### SDEA RECOGNITION

- a. The Recognition Committee is responsible for planning and organizing the following activities:
  - Day of the Teacher Celebration
  - SDEA Awards Banquet
  - Recognition activities at the Representative Council meetings
- b. The Recognition Committee is responsible for the publication and dissemination of information about the SDEA Scholarship program. The committee organizes the activities involved in the selection of the scholarship winners and presentation of the awards.
- c. The committee is responsible for the selection of the award recipients for the following awards:
  - Who Awards
  - Crystal Apple
- d. The President is responsible for selecting the recipient(s) of the SDEA President's Award.
- e. The Board of Directors is responsible for selecting the recipient(s) of the SDEA Board of Directors' Award.
- f. The Executive Director is responsible for selecting the recipient(s) of the Executive Director's Award.

STANDING RULE 6.0

CTA MATTERS

6.1 SDEA REPRESENTATIVES ON STATE COUNCIL OF EDUCATION

STANDING RULE 6.0

CTA MATTERS

a. SDEA Representative(s) on State Council of Education

STANDING RULE 6.1

SDEA REPRESENTATIVES ON STATE COUNCIL OF EDUCATION

- a. Is a member of the State Council and is expected to attend Service Center Council meetings. (1/22/65) (11/28/07)
- b. Will familiarize himself/herself with the governing documents, Standing Rules, and Major Policies of SDEA (1/22/65) (11/28/07)
- c. Informs the SDEA President at least 48 hours in advance, where possible, in the event he/she is unable to attend a State Council and or Service Center Council meeting. (1/22/65)
- d. The President or chairperson is responsible for transmitting to the delegation SDEA mandates on Major Policies. (1/22/65) (11/28/07)
- e. Alternates to CTA State Council of Education shall be elected by the SDEA membership in the following manner: candidates not elected as State Council Representatives shall become alternates to State Council in chronological order based on the number of votes received for the position of State Council Representative. In the event that the Association does not have the number of appropriate alternates, a special election shall be held to fill the vacancies. (8/15/73) (11/8/78) (3/9/88)

STANDING RULE 7.0

NEA MATTERS

7.1 Election of NEA-RA Delegates

7.2 NEA-RA Delegate Reimbursement

7.3 NEA-RA Chairperson

## STANDING RULE 7.1

### ELECTION OF NEA DELEGATES

Delegates to the NEA-RA shall be elected at-large in accordance with NEA election guidelines. (10/18/78) (11/8/78) (11/28/07)

## STANDING RULE 7.2

### NEA-RA DELEGATE REIMBURSEMENT

SDEA delegates to the NEA-RA shall receive reimbursement for attendance at the NEA. (11.8.78) (5.22.23)

## STANDING RULE 7.3

### NEA-RA CHAIRPERSON

- a. The ballot for SDEA President shall include the designation NEA-RA delegate. (10/13/78)
- b. The President shall assume the position of chairperson of the SDEA delegation to the NEA Convention. (12/13/78)

## STANDING RULE 8.0

### COLLECTIVE BARGAINING

#### 8.1 Association Representatives

#### 8.2 Bargaining Procedure

#### 8.3 Reports to the Board of Directors

#### 8.4 The Bargaining Commission

## STANDING RULE 8.1

## ASSOCIATION REPRESENTATIVES

- a. The President shall be responsible for the appointment of members to the Bargaining Team subject to concurrence of the Board of Directors. He/she shall also be responsible for maintenance of a list of available alternates to serve in the absence of a regular member. In selecting members of the Bargaining Team, the President shall attempt to maintain a balance of expertise and to establish equal representation to all Association members. (3/1/71) (12/13/78)
- b. Association members on the Bargaining Team shall be responsible to the SDEA Board of Directors. Such members may be recalled for just cause by a two-thirds (2/3) vote of the membership of the SDEA Board of Directors. (3/11/71) (12/13/78)
- c. The President shall appoint Association Representatives, subject to the approval of the SDEA Board of Directors to any consultation committees that rise out of the bargaining process. Such representatives shall be properly instructed by the Executive Director concerning applicable Major Policies and shall be required to report to the SDEA Board of Directors when necessary to receive guidance. (3/1/71) (12/13/78) (11/28/07)

## STANDING RULE 8.2

### BARGAINING PROCEDURE

Bargaining between the San Diego Education Association and the Board of Education of the San Diego Unified School District shall be conducted pursuant to the Government Code, the current contract between SDEA and the District pursuant to the Association Governance Documents. (3/1/71) (12/13/78) (11/28/07)

## STANDING RULE 8.3

### REPORTS TO THE BOARD OF DIRECTORS

The Executive Director shall support and assist the Bargaining Team in keeping the Board of Directors informed on the negotiating process whenever the situation makes it desirable. (3/1/71) (12/13/78)

## STANDING RULE 8.4

### THE BARGAINING COMMISSION

- a. At least nine months prior to the expiration of a collective bargaining agreement, the President shall appoint with the concurrence of the Board of Directors, a Bargaining Commission composed of a minimum of twenty (20) Association members representing a broad cross section of the Association bargaining unit. (11/28/07)

The Bargaining Commission as composed shall assume the tasks and responsibilities:

- b. Participate in negotiations training activities.
- c. Develop, distribute and tabulate a survey of the Bargaining Unit to determine issues of concern to the membership during the upcoming round of negotiations.
- d. Conduct hearings for members and interest groups among the membership regarding issues of concern during the upcoming round of negotiations.
- e. Conduct research to support potential Association bargaining proposals.
- f. Participate, as requested by the Bargaining Commission, in developing the Association's proposals for the upcoming round of negotiations.
- g. In cooperation with and at the request of the Bargaining Team, serve as rotating members of the bargaining team during negotiations with the district.
- h. Interested Bargaining Commission members will be considered for vacancies on the Bargaining Team; however, nothing herein shall prevent the Association from selecting bargaining team members from other sources, based upon the needs of the Association.

#### STANDING RULE 9.0

#### AFFILIATIONS

#### 9.1 SDEA/SDEA-R

#### STANDING RULE 9.1

AFFILIATION BETWEEN THE  
SAN DIEGO EDUCATION ASSOCIATION (SDEA) AND THE  
SAN DIEGO EDUCATION ASSOCIATION—RETIRED (SDEA-R)

- a. Recognition: The SDEA recognizes that the SDEA-Retired is a continuation of the SDEA and is united with the SDEA in solidarity towards improving the working conditions of teachers and the learning conditions of students. (5/25/11)

## **SDEA ELECTION GUIDELINES NOMINATIONS AND ELECTIONS**

Revised and Adopted by SDEA Board of Directors on 12-2-2016

### **A. Election Committee**

1. There will be an Election Committee. (12/2/16)
2. The Election Committee and Chairperson will be appointed annually by the President with the concurrence of the Board of Directors at the beginning of each school year. (12/2/16)
3. The Committee will be composed of at least three (3) members who are not on the Board of Directors, who are familiar with the unit operations, and who are not seeking election. (12/2/16)
4. The Elections Committee is charged with ensuring that elections are conducted in a fair and impartial manner. (12/2/16)
5. A member will abstain from participation in all Election Committee activities during the period in which s/he or her/his immediate family member is a candidate. (12/2/16)

### **B. Election Requirements**

1. The chapter will 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 will be active membership in the chapter. (12/2/16)
2. Every active member will be assured of voting by secret ballot. (12/2/16)
3. There will be an all active member vote. (12/2/16)
4. All active members will be provided election information by mail and/or by last known private e-mail. A member who is off-track, at a Child Development Center, within a special program and/or a Visiting Teacher will be sent election information by U.S. mail to his/her last known residence and/or by last known private e-mail. (5/25/11) (12/2/16)
5. A chapter will provide means for all active members to vote by paper or online ballot, and it will be the responsibility of the member to notify SDEA if s/he desires a ballot at a site other than the regularly scheduled voting place. (12/2/16)
6. The Election Committee will determine, and cause to be created, lists needed for elections. (5/25/11) (12/2/16)
7. When voting at sites, if a roster of active members is prepared for a school site ahead of time, initials of members may be accepted. (5/25/11) (12/2/16)
8. An active member will acknowledge receipt of a paper ballot by signature on a registration Sheet at the time of issuance of the ballot or on an envelope when returning the voted ballot. (5/25/11) (12/2/16)
9. Members voting online are required to use unique number(s) as determined by the Election Committee. (5/25/11) (12/2/16)

### **C. Timeline**

1. Schools on alternative calendars will be considered when setting election timelines.
2. An election begins with the announcement of vacancy(ies) and terms of office and cannot be stopped until the conclusion of the election, including run-offs if necessary. (5/25/11) (12/2/16)
3. The timeline for elections will include the following: (5/25/11) (12/2/16)

- a. Announcement of vacancy(ies) and term(s) of office will be publicized using methods that provide all members the opportunity to file a declaration of candidacy. The term(s) of office will be clearly stated on the following documents:
  1. Announcement.
  2. Declaration of Candidacy form.
  3. Ballot
- b. There must be at least fifteen (15) calendar days between the announcement date of the vacancy(ies) and the date of the election;
- c. Place, time, and date of receipt (date received, not date post marked) for Declaration of Candidacy forms;
- d. Final date to acknowledge candidates' Declaration of Candidacy forms;
- e. Date(s) for preparation of ballots;
- f. Date on which ballots will be distributed;
- g. Final date by which to request a ballot;
- h. Date(s) when voting will take place;
- i. Date(s), time, and place where ballots will be counted/certified;
- j. Date that announcement of results will be made to leadership, candidates, members, and posted at each work site (which will not be later than four [4] calendar days following the counting/certifying of ballots);
- k. Dates and timeline for a run-off election, if necessary;
- l. Deadline for filing of challenges (date received, not date post-marked). (12/2/16)

#### **D. Procedures**

1. Declaration of Candidacy Form(s) will be available at SDEA and on the website following the announcement of vacancy(ies). ([www.sdea.net](http://www.sdea.net)) (12/2/16)
2. It is the candidates' responsibility to make certain that the Declaration of Candidacy forms will be submitted to the designated SDEA staff either by email, fax, US mail or by hand delivery (between the hours of 8:00 a.m.-5:00 p.m., Monday through Friday) to the SDEA office by the announced deadline.
  - a. Designated SDEA staff verifies by signature receipt of the Declaration of Candidacy forms prior to the deadline. (12/2/16)
3. Candidates will receive confirmation either by e-mail, U.S. mail, or written receipt (when hand-delivered) from the SDEA office that their Declaration of Candidacy form has been received. Designated staff will make three (3) copies of the Declaration of form within two (2) work days: the original goes to the Election Chair, and copies to the staff election liaison, the nominee, and the SDEA receptionist/secretary. (12/2/16)
4. Election Guidelines will be provided to the candidate upon receipt of Declaration of Candidacy form by either email, U.S. mail, or in person. Candidates must confirm receipt of Election Guidelines by contacting the office through email, fax, or by signature. (12/2/16)
5. Written campaign statements must be received at SDEA by 5:00 p.m. of the announced deadline.
  - a. Campaign statements for SDEA Officers and SDEA Board of Directors will be limited to 250 words.
  - b. Campaign statements for CTA State Council and NEA Delegate will be limited to 30 words.
  - c. SDEA or the Election Chair will not edit statements. Any word(s) exceeding the limitations will not be printed. (12/12/16)
6. If the SDEA Board of Directors determines that photos will be used in the election, each candidate may submit a photo to be run with the candidate statement. (12/2/16)

7. Each candidate may, at his/her expense, submit one flyer in sufficient quantity to provide one (1) copy per site (at least 300 copies). Provided that the flyer is submitted by the announced and approved by the election committee deadline, it will be packaged and distributed to each site to be posted. All campaign flyers/materials must include a disclaimer stating: "The views and opinions expressed are those of the candidate and not necessarily those of the unit, CIA, or any of its affiliates." (12/2/16)
8. Flyers provided by the candidates will not be edited. However, in the event that a flyer has verifiable inaccurate information, SDEA will allow the candidate a three (3) day extension to correct and reprint flyers to be distributed.
9. The distribution of any additional campaign materials is the responsibility of the candidate in accordance with SDEA and District guidelines. (12/2/16)
10. Except for the process stated in 7 above, Association and Council Representatives will not be required to distribute a candidate's materials. (District procedures prohibit the use of school mail for this purpose.) (12/2/16)
11. Candidates' Rights:
  - a. Privileges extended to one candidate will be extended to all candidates.
  - b. Each candidate will receive a copy of the election timeline, procedures, and guidelines.
  - c. Each candidate will have the right to a list of names and addresses of work sites and the number of active members at each site within their purposed constituencies for the purpose of campaigning. (12/2/16)

#### **E. Campaign Finances and the Use of Unit Resources (5125111) (12/**

1. Unit monies received through dues, assessment or similar levy will not be used to promote any candidate.
2. A unit may not state or indicate its preferences for a candidate in the unit's publications.
3. The use of links to any Association website and/or social media sites by a candidate is prohibited.
4. The Association will not make personal emails available to candidates.
5. District email addresses and/or systems will not be used for campaigning.
6. Candidates cannot campaign on any affiliated chapter/service center social networking sites created for Association members to communicate with each other.
7. A candidate cannot accept direct contributions from a unit's treasury or indirect contributions in the form of use of a unit's assets, facilities, staff, equipment, mailings, goodwill or credit.
8. A candidate cannot use the official logo of the unit or the official Association title in a way that suggests that the candidate has the support of the unit, CTA or any of its affiliates. This prohibition includes candidate email addresses.
9. It is the candidates' responsibility to adhere to these guidelines on any personal website or link used in campaigning for any unit, CTA, or affiliate position. Such websites and/or links should be germane to the office being sought. (12/2/16)

#### **F. Ballot (5/25/11)**

1. The names of the candidates will be listed on the ballot in CTA alphabetical order. The name of each candidate will be printed on the Declaration of Candidacy form. When a candidates last name is hyphenated, the name before the hyphen will be used for placement on the ballot. (12/2/16)
2. The ballot will state the name, office, term, number of candidates to vote for, and names of the candidates. (12/2/16)
3. The ballot will include space for write-in candidates except in run-off elections. (12/2/16)
4. Method(s) to receive ballots are by site, by mail, at a specified voting site, or online. (12/2/16)
5. Refer to section **H** for the "Counting of Ballots" procedure. (12/2/16)

## G. Voting Methods and Distribution of Ballots (5/25/11)

- i Each active member will receive instructions and a ballot(s) either by paper or online. (12/2/16)
  - a. Active members who are off-track or on a dues-paying leave will be notified by mail in order to provide them an opportunity to vote. (12/2/16)
  - b. Visiting Teachers who are active members as defined in SDEA Bylaws, Article **II** Membership, Section 2, and have paid dues during the time the ballots were prepared (excluding winter and spring breaks) will receive their ballots by U.S. mail or e-mail in order to provide them an opportunity to vote. (12/2/16)
  - c. A new unit member (six [6] months or less) is excluded from paying back dues prior to voting but must become a dues-paying member at that time. (12/2/16)
  - d. A non-dues-paying member who has been with the District more than six (6) months must reconcile membership dues prior to voting. (12/2/16)
- i Voting will be by one or a combination of the following methods: (12/2/16)
  - a. By site (12/2/16)
    - 1) Voting at school site(s)/specified voting site (ballot only). 12/2/16)
      - a. Each voter must sign a voter roster/sign-up sheet before receiving a ballot.
        - 1) Voter roster-list of eligible voters. (12/2/16)
      - b. If a Site Representative is a candidate, he/she will not oversee the voting. (12/2/16)
      - c. Campaign materials are not allowed in or near the polling area nor will campaign materials be distributed with ballots. (12/2/16)
      - d. The marked ballot must be returned to the designated Site Representative or ballot box. (12/2/16)
      - e. Site Representatives must return all voter rosters/sign-up sheets and ballots to the Election Committee by the designated date and time. (12/2/16)
      - f. Preliminary counts will not be completed at school/work sites. (12/2/16)
    - 2) Voting at school site(s)/specified voting sites using envelopes: (12/2/16)
      - 1) A list of current active members, which includes each member's name and school address shall be prepared. (12/2/16)
      - 2) The voter shall be provided with the following: (12/2/16)
        - a. A ballot;
        - b. Instructions: (12/2/16)
          - 1. Fold and place the voted ballot in the inner envelope; (12/2/16)
          - 2. Place the unsigned inner envelope into the outer envelope; (12/2/16)
          - 3. Print and sign his/her first and last name and employee ID number on the SDEA addressed envelope; (12/2/16)
          - 4. Ballots must be returned to SDEA by U.S. mail deadline. (12/2/16)
    - 3) Voting using US mail: (12/2/16)
      - a. Special care should be taken in all phases of handling the ballots to ensure the accuracy and the secrecy of voting by mail. (12/2/16)
      - b. A list of current active members will be prepared, which includes the following: name, home address, or cost center address (if the home address is not included in the SDEA data base). (12/2/16)
      - c. The mailing list will exactly correspond to the current official active member list of voting members. (12/2/16)

- d. Members who are off-track during the time of the election, at Child Development Centers, with a special program, a Visiting Teacher in active status, or a member on dues-paying leave will receive ballots through the US mail. Members in the categories above whose home addresses are not in the data base will have ballots mailed to their cost center. (12/2/16)
- 1) Each voter will be provided with: (12/2/16)
  - a. A ballot;
  - b. Instructions on
    - 1. Fold and place the voted ballot in the inner envelope;(12/2/16)
    - 2. Place of the unsigned inner envelope into the outer envelope; (12/2/16)
    - 3. Print and sign his/her first and last name and employee ID number on the SDEA addressed envelope. (12/2/16)
    - 4. Ballots are returned to SDEA by U.S. mail by deadline.

**(Moved to new H. Counting Ballots) (12/2116)**

- 4) Online voting: (12/2/16)
  - a. Voting instructions will be mailed to homes or sent via personal a-mails to eligible active members and will be available on approved websites. (12/2/16)
  - b. Access to an on-line ballot will be through personal e-mail or on approved website(s). (12/2/16)
  - c. A paper ballot(s) option will be available at the SDEA office. The ballot must be completed on site and put into the ballot box. (12/2/16)
  - d. A data file of eligible active members, approved by the Election Committee will be provided to the approved election vendor. That vendor will prepare all requested lists which must be approved by the Election Chair. (12/2/16)
  - e. The approved election vendor will count on-line ballots and the Election Committee will verify all results. (12/2/16)
  - f. All paper ballots will be processed, verified, and counted by the Election Committee as Listed in section H. Counting Ballots. (12/2/16)
  - g. The Election Committee will verify and combine the totals from steps 5 and 6 above. (12/2/16)

**H. Counting Ballots (5/25/11)**

- 1. Each candidate may be present during the counting and verification of the ballots, or may designate an observer to be present. The candidate or observer must notify the Election Committee by e mail at least 24 hours prior to the start of the counting of ballots. Observers will not interfere verbally or physically with the counting and must remain in the counting room until dismissed by the Election Committee Chair. Observers may not use any electronic devices while present nor engage in conversations. (12/2/16)
- 2. The Election Committee will verify signatures either on envelopes with the list of active members or signature sheets with ballots received, and count the ballots, on the date(s) designated in the election. (12/2/16)
- 3. Each office/position on the ballot will be treated as a separate race. (12/2/16)
- 4. The signed envelope containing the ballot when received in the SDEA office will be put in a locked ballot box (sealed and witness by at least three [3] people including the Election Chair) until the votes are counted. The Election Chair will hold the only key to the ballot box. Ballots received after the deadline will be date-stamped and set aside. (12/2/16)
- 5. At the time of counting, prior to opening, the names on the outer envelopes will be checked against the official active member list of eligible voting members. The active member list and signed envelopes will be marked to show that the voter has returned a ballot and that the envelope and list

have been checked. The number of signed envelopes must match the number of marks on the active member list. (12/2/16)

6. The signed envelopes will then be opened and the inner envelope removed. The signed envelopes will be put in a separate stack for safekeeping as a record of voters. (12/2/16)
7. All inner envelopes will be slit and the ballots removed from the inner envelopes, stacked and counted. The number of inner envelopes should match the number of signed envelopes. (12/2/16)
8. Ballots in signed envelopes set aside and not counted are: (12/2/16)
  - a. Multiple ballots from a single verified member. (duplicates) (12/2/16)
  - b. Voters who are not members in good-standing. (12/2/16)
  - c. Ballot(s) submitted after deadline. (12/2/16)
  - d. Envelopes without a signature. (12/2/16)
9. Blank and/or illegal ballots for each office/position/race will also be set aside. Examples include the following: (12/2/16)
  - a. Directions on ballot not followed (ex. No bubble[s] corresponding to the write-in name[s]); (12/2/16)
  - b. Votes cast for more than the number allowed. (12/2/16)
  - c. Votes cast on an unofficial ballot (reproduced). (12/2/16)
  - d. Write-in candidate not a member. (12/2/16)
  - e. Voter's intent unclear (ex. illegible write-in). (12/2/16)
10. The Election Committee categorizes each illegal ballot, counts each separately, as listed in 8 and 9 above, and makes a note of each reason. The illegal ballots will remain separate. (12/2/16)
11. The Election 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 or illegal ballots for each office/position with an explanation of illegality, and signed by two (2) Elections Committee members. The Teller's Report will not contain a school-by-school or site-by-site breakdown report. (12/2/16)
12. The Chair of the Election Committee will deliver the report of the election results to the President or designee. The SDEA President or designee will notify the candidates of the election results within three (3) days after the counting of the ballots. The election results will be posted at each work site, no later than four (4) calendar days following the counting/certification of ballots. (12/2/16)
13. The ballots, voter sign-up sheets, and outer envelopes will be retained by the unit for one year after the election. All ballots not distributed will be shredded at 5:00 p.m. on the date designated as the election deadline. (12/2/16)

## **I Voting Requirements (5/25/11)**

All voting requirements will be established in accordance with CTA guidelines. Unless otherwise specified, all elections will be decided by majority vote. Write-in votes are in accordance with CTA guidelines. Directions must be followed for write-in votes to be valid and counted.

1. A majority vote means more than half of the legal votes cast. (12/2/16)
2. A plurality vote means the largest number of votes 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 procedures will be followed: (12/2/16)
  - a. The ballots will be recounted. (12/2/16)
  - b. If the result is still a tie, the Election Committee Chair will: (12/2/16)
    - 1) Call the candidates' (according to CTA alphabet) on speaker a phone with a witness and inform them of the Tie. If all the candidates wish to remain in the race, a coin toss will be used to determine the winner. (12/2/16)

3. The Election Committee Chair will designate the time and place for the coin toss and inform the candidates, who may have an observer present. (12/2/16)
  - 1) If the first candidate called wishes to remain in the race, the Chair will ask that candidate to choose "heads" or "tails" in the coin toss. (12/2/16)
  - 2) The Election Committee will note the results of the coin toss on the CTA/SDEA Official Teller's Report. (12/2/16)
  - 3) The Election Committee will follow the established procedure (H.12.) in notifying the president or designee. (12/2/16)
4. A two-thirds (2/3) vote means at least two-thirds (2/3) of the legal votes cast. (12/2/16)
5. For unit executive officers, the election will be by majority vote. (12/2/16)
6. For State Council, see the Election Timelines, Procedures, and Guidelines in the CTA Elections Manual. (12/2/16)
7. If an SDEA candidate does not receive a majority vote, a run-off election will 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 will be declared elected. There will be no provisions for write-in candidates in run-off elections. (12/2/16)
8. NEA Local Delegates, the election will be by majority. (12/2/16)
9. An election for NEA Local Delegates may be waived and the candidate(s) declared elected following a period of open nominations if the number of candidates is equal to or less than the number of delegate positions to be filled. This election practice will not generate successor delegates. (12/2/16)
10. For NEA State Delegates, the election will be by plurality vote. Successor delegates (alternates) are ranked in order of votes received. Results must be sent to the Service Center Council which will forward the results to CTA. (12/2/16)
11. For additional CTA/NEA election guidelines refer to the official CTA Elections Manual.  
**Moved to H.** (12/2/16)

## **J. Challenge Procedures (5125/11)**

1. Challenges for SDEA the elections, of State Council Representatives, Alternates, or State, and Local delegates to the NEA-RA follow the procedures in the CTA Elections Manual. (12/2/16)
2. A challenge cannot be initiated until after the results of the election have been verified and posted at the SDEA office. (12/2/16)
3. The challenging party(ies) must notify the unit president and the Election Chair of a challenge in writing within ten (10) days after the posting of the results of the election at the SDEA office. If the unit president is a candidate on the ballot, the next senior officer must be notified. The challenge procedures are available on-line. These include: (12/2/16)
  - a. Specify which unit bylaw(s) and for standing rule(s) have been violated using the SDEA/CTA challenge form. (12/2/16)
  - b. Attach evidence of the violations, insofar as possible. (12/2/16)
  - c. List names and addresses of parties who can give evidence. (12/2/16)
4. Upon receipt of the challenge, the Election Chair 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 SDEA's Election Committee in accordance, with the unit's bylaws and standing rules, will conduct an investigation and determine whether or not the challenge: (12/2/16)
  - a. Is a violation of SDEA/CTA's election requirement(s). (12/2/16)
  - b. Is supported by the appropriate documentation. (12/2/16)
  - c. Requires more information. The information will be obtained via the most feasible method. (12/2/16)

- d. Identifies violation(s) that may affect the outcome of the election. (12/2/16)
- 5. Within the same 10 calendar day period, the unit's Election Committee will submit a written report including issues, findings, and recommendations to the Chapter President and the Board of Directors. (12/2/16)
- 6. Any member of the Board of Directors who was a candidate on the ballot, or whose immediate family member is a candidate on the ballot, will abstain from voting on the report. If in the case where the majority of the Board of Directors is unable to act on the challenge, the decision will move to the next highest decision-making body according to the unit's governance documents (CTA). (12/2/16)
- 7. The Board of Directors will act on the report no later than 10 calendar days following receipt of the written report of the Election Committee, in accordance with CTA Challenge Procedures as described in the Local Elections section of the CTA Elections Manual. The Board of Directors must issue its decision(s) in writing to the challenging party(ies) and the Election Committee Chair. (12/2/16)
- 8. If the challenging party(ies) wish(es) to appeal the decision of the SDEA's Board of Directors, he/she/they may file an appeal in writing to the CTA President within ten (10) calendar days from the date of the decision of the Board of Directors. The appeal will be the original challenge filed at the unit level and will include copies of the following documents: (12/2/16)
  - a. SDEA's bylaws, standing rules, election procedures, or CTA manual section violated. (12/2/16)
  - b. Evidence of the violations, insofar as possible. (12/2/16)
  - c. Names and addresses of parties who can give evidence. (12/2/16)
  - d. Written response of the unit's Board of Directors to the original challenge. (12/2/16)
- 9. If the Board of Directors fails to act within ten (10) calendar days of the initial challenge, the individual may file an appeal as described in 8 (a-d) above by writing to the CTA President. (12/2/16)
- 10. When an election has been conducted to fill one or more positions, and the election's results are challenged, the winner(s) of the election will hold of until such time as the challenge is resolved. (12/2/16)
- 11. The challenge procedure for election of State Representatives and Alternates, and State or Local Delegates to the NEA Representative Assembly is outlined in the CIA Elections Manual. (12/2/16)

**K. Association Representative Election Procedures for site Council Representative (AR)/Council Representative (CR) (12/2/16)**

- 1. All SDEA site leadership positions are filled by election. Active members are eligible to hold or retain elective office in the SDEA by membership vote. Elections for site AR/CR's positions are held annually at school sites and those results are reported to SDEA office by specified date. (12/2/16)
- 2. Representation guidelines (12/2/16)
  - a. Each site/program or cost center is allowed at least one (1) AR. (12/2/16)
  - b. CR's are apportioned for each additional 20 members or fraction thereof starting with the 31st member. (12/2/16)
  - c. Each site/program or cost center is to have at least one (1) AR and one (1) alternate, regardless of site size. (12/2/16)
- 3. Nominations (12/2/16)
  - a. Nominations will be taken at a site meeting or by written request. Notification of date and time and intent to nominate must be provided to all site members at least three (3) working days in advance. (12/2/16)
  - b. Opportunity will be provided for every member to nominate or be nominated. (12/2/16)
  - c. Self-nomination is acceptable. (12/2/16)
  - d. Only SDEA members are eligible to run for the position of AR/CR, Alternates, or CR. Nominees must have been members of SDEA for a minimum of 60 calendar days at the time of nomination. (12/2/16)
  - e. A copy of these Election Procedures will be posted on the SDEA bulletin board at least three (3)

working days prior to nominations and remain posted until completion of the election. (12/2/16)

4. Elections (12/2/16)
  - a. Names of all persons nominated will be placed on the ballot. (12/2/16)
  - b. A sample ballot, including a space for write-ins, will be posted at least three (3) working days prior to the elections. 12/2/16)
  - c. Notification of the date, time and place of elections will be given to all site members at least three (3) working days prior to the election. (12/2/16)
  - d. Election will be by secret ballot. (12/2/16)
  - e. The person(s) receiving the highest number of votes will be considered elected. (12/2/16)
  - f. Any person running for office will not conduct elections. Any SDEA member may conduct the election. If necessary, the sites may contact the Election Chair to run the site AR/CR election. (12/2/16)
  - g. All members will sign a registration sheet before receiving a printed ballot(s). (12/2/16)
  - h. Deadline for returning the ballots, tally sheet, and registration sheet(s) for the election is announced annually. (12/2/16)
  - i. Challenged positions: refer to section J. 1-9 (12/2/16)

#### **L. Procedures for San Diego County Service Council and San Diego and Imperial Counties Central Labor Council Delegates (5125/11) (1212116) (9/27/23)**

1. Election Timeline (12/2/16)
  - a. All elections for San Diego County Service Center Council will take place at the last Rep Council of the school year. All active members are eligible to run for these positions. Seats are elected at large." (12/2/16) (9/27/23)
  - b. Terms of office for San Diego County Service Center Council will be one (1) year, from August 1 through July 31 of the following year. (12/2/16) (9/27/23)
  - c. SDEA members already serving as CTA State Council representatives will also be deemed elected to the San Diego Service Center Council during their term as CTA State Council representatives. (12/2/16)
2. Representatives for SDSCC and San Diego Imperial Counties Central Labor Council (12/12/16)
  - a. The number of members to be elected will be determined by the Election Committee according to the following formulas: (12/2/16)
    1. SDSCC Council delegates (1 SCCR for every 200 members, the President represents the first 200 members+ elected State Council Delegates + additional Reps based on the formula). (12/2/16)
    2. Labor Councils Delegates (1-500 members=6 Reps, 500 thereof or major fraction --1 Rep. President NOT automatically included). (12/2/16) (9/27/23)
3. Nominations may be submitted to the Election Committee after the May Representative Council meeting in writing or at the June Representative Council meeting from the floor. Candidates may self-nominate. (12/2/16)
4. Election (12/2/16)
  - a. If the number of nominations does not exceed the number of vacant seats for San Diego County Service Center Council, the Representative Council can wave the ballot and vote by acclamation. The nominees will be deemed elected unless there is an objection from the floor of the Representative Council. If there is an objection, the presiding officer will conduct a voice vote of the Representative Council. A two-thirds (2/3) majority vote will be required to approve the election. (12/2/16) (9/27/23)
  - b. If the number of nominations exceeds the number of vacant seats, the Election Committee will print a ballot including the names of all nominees. Ballots will be distributed to the authorized Representative Council members present, (wearing name badges) and collected before the end of

the meeting. Nominees will be listed on the ballot according to existing CTA Alphabet. Ballots will be counted by the Election Committee. (12/2/16)

- c. Seats left unfilled after the last Representative Council meeting of the school year, or that become vacant during the normal term, may be filled by appointment by the SDEA President, with the concurrence of the SDEA Board of Directors. Appointees may serve on an interim basis until the next meeting of the Representative Council following the appointment, at which time the appointees, if approved by the Representative Council, may serve the remainder of the term. (12/2/16) (9/27/23)

5. Observers (12/2/16)

- a. Each candidate may be present during the counting and verification of the ballots, or may designate an observer to be present. Observers may not use electronic media. (12/2/16)

6. Deleted (12/2/16)

- a. All ballots not distributed will be shredded at 5:00 p.m. on the date designated as the election deadline. Moved to H 13. (12/2/16)
- b. The SDEA President or designee will notify the candidates of the election results within three (3) days after the counting of the ballots. Moved to H 12 end of first sentence. (12/2/16)
- c. Moved to H 12; Moved above under L. 2.a (12/2/16)

**M. Initiative Procedures (5/25/11) (12/2/16)**

1. The active membership will have the authority to make decisions on any matters affecting the Association or its activities through the initiative process. (12/2/16)
2. An active member will file a notice of the intent to circulate a petition with the chapter president by providing a copy of the petition to be circulated and the names of at least three persons responsible for its circulation and supporting the proposed measure. (12/2/16)
3. The chapter president will receive the notice of the intent to circulate, acknowledge (by signature) and file it with the Election Committee. (12/2/16)
4. The timeline for gathering signatures will commence the day that the notice of intent is registered. A maximum of 15 calendar days will be permitted to obtain the signatures of at least sixty (60) percent of the active members of the chapter. The petition will contain the question proposed to be placed on the ballot. (12/2/16)
5. The circulators will present the petition(s) containing the original signatures to the chapter president. (12/2/16)
6. The chapter president will have 30 calendar days in which to verify the membership of the signers of the petition. (12/2/16)
7. If there is an insufficient number of signatures, the petition circulators will be notified within the next three (3) calendar days after verification that the petition failed for a lack of signatures. (12/2/16)
8. If the petition is supported by a sufficient number of valid signatures, the chapter president will cause a ballot to be furnished to the members within no less than 15 calendar days after verification of membership. Any period when school is officially not in session will not be included in this count. (12/2/16)
9. Regular election procedures (e.g., election of officers) will be followed. (12/2/16)
10. The proposal will take effect immediately upon receipt of the required number of votes, unless otherwise specified. (12/2/16)

**N. Referendum Procedures (12/2/16)**

1. Any referendum action or purposed action by the Representative Council or the Board of Directors. Will be referred to a vote of the active membership upon a two-thirds (2/3) vote of the Representative Council or the Board of Directors at any valid meeting. (12/2/16)

2. The referendum action will prescribe the exact wording of the question to be posed to the active a. Membership on the ballot. (12/2/16)
3. The chapter president will cause a ballot to be furnished to the active member's no less than 15 Calendar days after action by the Representative Council, provided that any period school is officially not in session shall not be included in this count. (12/2/16)
4. Regular election procedures (e.g. election of officers) will be followed. (12/2/16)
5. The proposal will take effect immediately upon receipt of the required number of votes, unless otherwise specified. (12/2/16)

#### **O. Recall Procedures (12/2/16)**

1. Any active member(s) has/have the authority to recall from office any person or persons having been elected, but must first file a copy of a petition with the Election Committee Chair before it can be circulated. (12/2/16)
2. The petition must include: (12/2/16)
  - a. Name of the individual who is the subject of the recall;
  - b. Office of the individual; (12/2/16)
  - c. Date of the petition; (12/2/16)
  - d. Name(s) of person(s) filing the petition; (12/2/16)
  - e. Reason for purposed recall; (12/2/16)
  - f. Notation that Each signature must be in ink", and (12/2/16)
  - g. Space for the printed name, signature, employee I.D. number, work site and date of signing for each name on the petition. (12/2/16)
- New 2e**
3. Within fourteen (14) working days after receipt, Election Committee Chair will determine whether the original petition contains the necessary information. (12/2/16)
  - a. if the original petition does not contain the necessary information (as per number 2 above) the Election Committee Chair will inform the petitioner(s). (12/2/16)
  - b. If the original petition does contain the required information, it will be initialed by the Election Committee Chair. Only the original initialed petition can be copied and circulated for signatures. (12/2/16)
  - c. The Election Committee Chair will inform the petitioner(s) of the rules, procedures, timelines (starting date and deadline) for gathering signatures, and the need for protection of due process rights of all parties. (12/2/16)
  - d. The timeline for gathering signatures will commence the day that the notice of intent is registered and approved by the Election Committee Chair. (12/2/16)
  - e. The Election Committee Chair will send written notification to the unit officer whose recall is being proposed and will also notify the other officers of the unit. A copy of the original petition will be enclosed. (12/2/16)
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. (12/2/16)
5. No unit member or officer may state or indicate a preference in the unit's newspaper, newsletter, media, or communication to its members. (12/2/16)
6. A maximum of sixty (60) calendar days will be permitted to obtain the signatures of at least twenty-five percent (25%) of the active membership making up the constituency of the person subject to the recall. (12/2/16)
7. The signed petitions must be received by the Election Committee Chair by the deadline date. (12/2/16)
8. The Election Committee will have ten (10) calendar days after the receipt of the petition to verify signatures. (12/2/16)
9. If there are insufficient signatures the Election Committee Chair will notify the petition circulator(s) by

mail that the petition failed for lack of signatures. (12/2/16)

10. Immediately upon verification of the signatures, the Election Committee Chair will notify the president or designee of the fact that a recall has been initiated. (12/2/16)

11. The chapter president or the chapter vice president if the chapter president is the person being recalled, will cause a ballot to be furnished to the active member's no less than twenty (20) calendar days after verification of membership. The period that school is officially not in session will not be included in this count. (12/2/16)

12. The election must be concluded within fifteen (15) calendar days of distribution of the ballots. (12/2/16)

13. The election will be conducted on-line with provisions for a secret ballot / voter sign-up sheets.

14. The election will be certified in accordance with the unit's bylaws. (12/2/16)

15. The Election 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 will be posted at each work site not later than four (4) calendar days following the election. (12/2/16)

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Agreement Between the  
San Diego Education Association (SDEA)  
and the  
San Diego Education Association — Retired (SDEA-R)

(Revised May 25, 2011)

- I Recognition: While SDEA-R is affiliated with CTA-R and NEA-R, it owes its existence to SDEA and the SDEA Constitution. SDEA and SDEA-R consider SDEA-R to be a continuation of SDEA united, with SDEA in solidarity toward improving the lot of teachers and students.
- II Facilities: Both SDEA and SDEA-R members have invested in the facilities that are owned by SDEA, but SDEA-R recognizes that the cost of upkeep, cleaning, and other maintenance is continuing. Therefore, the following shall be recognized:
  - a. SDEA-R may use SDEA facilities at no cost, when available.
  - b. SDEA will provide a schedule of room set up costs.
- III. Services: Members of SDEA-R should be treated in the same manner as members of SDEA when it comes to services. However, these conditions must prevail:
  - a. Services involving use of materials, creativity, or machines should be considered beyond the normal scope of service to members.
  - b. Member services involving professional advice, legal rights, contractual rights, or inter-organizational conflicts shall be deemed to be no charge items to SDEA-R.
- IV. SDEA-R may report to the SDEA Board under the "member issues" time on the SDEA Board agenda.
- V. Issues between SDEA and SDEA-R should be resolved between the presidents of the organizations.