

**CALIFORNIA TEACHERS ASSOCIATION  
ELECTIONS AND CREDENTIALS COMMITTEE**

**REQUIREMENTS  
FOR  
CHAPTER ELECTION  
PROCEDURES**

**2019 - 2020**



# **PREFACE**

It is the purpose of these requirements to ensure the integrity of the electoral process. The principle of voting is to determine the mandate or choice as expressed by those voting. This requires that election procedures, both for candidates and for policy issues, must afford every member the opportunity to vote.

*[Revised 6/13]*



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# CALIFORNIA TEACHERS ASSOCIATION ELECTION PROCEDURES

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

**Chapter presidents must provide all Active members (hereinafter referred to as "members") an opportunity to vote. Chapter presidents do not have the option of deciding that such elections shall not be held.** *[Revised 6/13]*

The Elections Committee and Chairperson shall be appointed by the president and approved by the Executive Board to which it is responsible at the beginning of each school year. It will be composed of at least three members who are familiar with the unit operations and who are not seeking election. Voting members of the unit's governing body (i.e.: Executive Board) are not permitted to be on the unit's elections committee. Any Association member who is either a candidate on the ballot or whose immediate family member is a candidate shall abstain from all election committee activities on that particular ballot.

*[Revised 6/12, 6/13]*

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

## I. Procedural Components

The Election's Committee must determine the following prior to setting the election timeline:

1. Method by which Declaration of Candidacy(ies) are submitted (mail, hand delivered, fax);
2. Provision for elections committee chairperson or designee to be present to receive declaration of candidacy by filing deadline;
3. Procedure for distributing election guidelines/rules to candidates;
4. Campaign statement of candidates (decide on limit of number of words, and what to do if limitation is exceeded, and submission deadline);
5. Method of distribution of ballots;
6. Whether declarations of candidacy must be accompanied by a campaign statement, or whether the statement will be solicited later. If later, a deadline date must be established;
7. Provision for elections committee chairperson or designee to be present to receive declaration of candidacy by filing deadline;
8. Announce that the names are to be listed according to CTA alphabet; *[Revised 6/05]*
9. If not provided in governance documents, election will be decided by majority vote. If a candidate does not receive a majority vote, a run-off election shall be conducted between the candidates receiving the highest number of votes. The names on the ballot will be one (1) more than the number of vacancies to be filled. *[Revised 7/03, 6/13, 6/15]*

## II. Election Timeline

1. **Schools/work sites on alternative calendars shall be considered when setting election timelines.** *[Revised 6/13]*
2. **The 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.**
3. A Timeline for Elections shall include the following:
  - a. Announcement of vacancy(ies) and term(s) of office using a method that will ensure each member is aware of the opportunity to file a declaration of candidacy;
  - b. At least fifteen (15) calendar days between the announcement date of the vacancy(ies) and the date of the election;

- c. Place, time and date of receipt (date received, not date postmarked) for declaration of candidacy forms;
- d. Final date to acknowledge candidates' declaration of candidacy;
- e. Date for preparation of ballots;
- f. Date on which ballots will be distributed;
- g. Date by which to request a ballot;
- h. Dates that voting will take place (no less than five (5) and no more than fifteen (15) calendar days for voting); *Revised [6/17]*
- i. Deadline date (date received, not date postmarked), time and place for return of ballots;
- j. Date, time and place where ballots will be counted, which should be immediately following the deadline for receipt of voted ballots;
- k. Date that announcement of results shall be made to leadership, candidates, members, and posted at each work site, which date shall be not later than five (5) calendar days following the counting of ballots;
- l. Dates and timelines for run-off election, if necessary; and
- m. Deadline for filing of challenges to initial election and run-off if held (date received, not date postmarked). *(See Appendix A)* *[Revised 6/04, 6/06, 06/07, 06/08, 6/15]*

### **III. Nominations**

1. Open nomination is defined as the opportunity of any unit member to nominate any other unit member, including himself/herself. The only qualification for office is membership in the unit. Declaration of candidacy forms shall be readily available to members. The form must state the requirements as to the deadline for time and place of filing.
2. Withdrawal of Candidacy  
In order for his/her name not to appear on the ballot, any person withdrawing from candidacy may do so only by written request to the chapter's elections committee chairperson prior to the ballots being printed. *[Revised 6/17]*

### **IV. Term**

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

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

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

1. Monies received by a unit by ways of dues, assessment or similar levy must not be used to promote any candidate.
2. A unit may not state or indicate its preference for a candidate in the unit's publications.
3. The use of links to any Association website by a candidate is prohibited.
4. The Association shall not make available personal emails to candidates.
5. District email addresses and/or electronic systems shall not be used for campaigning. Use of district school mailboxes for campaigning must follow district policy. *[Revised 6/14]*
6. Candidates cannot campaign on any affiliated chapter/service center social networking sites created for association/leadership members to communicate with each other. *[Revised 6/10]*
7. Each candidate shall have the right to a list of the work site names and work site addresses with the number of Active members at each site for the purposes of campaigning. *[Revised 7/03, 6/04, 6/05, 6/07]*
8. A unit will honor all reasonable requests by a candidate to distribute campaign literature at his/her expense to all members in good standing, whether the distribution is by mail or other means. However, if distribution of campaign literature for one candidate is without charge, then distribution for all candidates must be without charge. Treating all candidates the same by refusing to honor any and all reasonable requests for distribution of campaign literature at the candidate's expenses is not permitted. The unit should inform all candidates of rules in this regard.



9. 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, good will or credit.
10. A candidate cannot use the official logo of the unit or official Association title in a way that suggests that the candidate has the support of the unit, CTA or any of its affiliates. This prohibition includes candidate email addresses. *[Revised 6/10]*
11. All campaign flyers/materials must include the following disclaimer, which must be stated verbatim: "The views and opinions expressed are those of the candidate and not necessarily those of the unit, CTA, NEA or any of its affiliates." *[Revised 6/04, 6/13]*

## **VI. Candidates' Statements**

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

## **VII. Ballot**

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

The ballot shall state the name of the office, the term, the number of votes allowed for each office/position (e.g. Vote for no more than \_\_\_\_\_. See Appendix H), and the name for each office/position of the candidate(s) who have filed declarations of candidacy within the timeline. The ballot shall include space for a write-in candidate for each office/position, except in a run-off election. For most elections, the number of write-in spaces should be equal to the number of votes allowed for the office/position. *[Revised 6/04, 6/07, 6/15]*

## **VIII. Voting Methods**

All Active members must have an opportunity to vote. Active members who are off-track or on a dues paying leave shall be notified by mail in order to provide them an opportunity and right to vote. Active members on Association/Affiliate business may request a ballot by mail. Provisions must be made for members to cast a ballot in such a manner that the person casting the vote cannot be identified with the vote cast. Voting by mail may be used at sites where it is difficult to contact each member individually to secure a signature on the official voter roster/sign-in sheet. Any Association member who is either a candidate on the ballot or whose immediate family member is a candidate shall abstain from all election committee activities on that particular ballot. Members shall be notified of the types of voting options utilized by the chapter. *[Revised 6/04, 6/07, 6/13]*

### **1. On Site Voting**

- a. Each voter must sign or initial a voter roster/sign-in sheet before receiving a ballot.
  - 1) Voter Roster – List of eligible voters.
  - 2) Voter Sign-in Sheet – List of eligible voters which includes a place for a signature.
- b. The marked ballot must be returned by the voting member to a designated ballot box. *[Revised 6/15]*
- c. Campaign materials are not allowed in or near the polling area nor should campaign materials be distributed with ballots. *[Revised 6/04]*
- d. Preliminary counts shall not be completed at school/work sites.
- e. Site representatives must return all voter roster/sign-in sheets and ballots to the Elections Committee by the designated date and time. Ballots must be secured and uncounted. Roster/sign-in sheets and ballots from each site must be kept together until verified by Elections Committee.
- f. Refer to Section X for the Counting of Ballots procedures.
- g. After verification of signatures, all ballots shall be placed in one stack for counting. *[Revised 6/12, 6/15]*

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

- a. A list of current members shall be prepared, which includes each member's name and work site. *[Revised 6/15]*

- b. The voter shall be provided with:
  - 1. A ballot;
  - 2. Instructions on:
    - a) Folding and placing of the ballot in the unsigned inner envelope;
    - b) Placing of the unsigned inner envelope into the outer envelope;
    - c) Signature and school/work site on the outer envelope addressed to the chapter; and
    - d) Deadline date for receipt of the voted ballot at the chapter office.
  - 3. A small envelope (inner envelope) in which to place the voted ballot; and
  - 4. A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name. [Revised 6/10]
- c. Prior to the counting of the ballots, the names on the outer envelope shall be checked against the official list of voters. The name on the official list shall be marked to show that the voter has returned a ballot.
- d. The outer envelope shall then be opened and put in a separate stack for safekeeping.
- e. All inner envelopes shall be placed in a separate receptacle.
- f. The inner envelopes shall be slit and the ballots removed from the envelopes, and placed in one stack for counting. [Revised 6/12]
- g. Refer to Section X for the Counting of Ballots procedures.

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

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

- a. A list of current official members shall be prepared, which includes the following: name, work and home address.
- b. A determination shall be made prior to the election whether the ballots shall be sent to the school/work site or to the home of the member.
- c. The voter shall be provided with:
  - 1. A ballot;
  - 2. Instructions on:
    - a) Folding and placing of the ballot in the unsigned inner envelope;
    - b) Placing of the unsigned inner envelope into the outer envelope;
    - c) Signature and school/work site on the outer envelope addressed to the chapter; and
    - d) Deadline date for receipt of the voted ballot at the chapter office.
  - 3. A small envelope (inner envelope) in which to place the voted ballot;
  - 4. A larger envelope (outer envelope) addressed to the chapter, on which the voter prints and signs his/her name.
- d. At the time of counting, the names on the outer envelope shall be checked against the official list of voters.
- e. The name on the official list should be marked to show that the voter has returned a ballot.
- f. The outer envelopes shall then be opened and put in a separate stack for safekeeping.
- g. All inner envelopes shall be placed in a separate container.
- h. All inner envelopes shall be opened and the ballots removed from the envelopes, and placed in one stack for counting. [Revised 6/12]
- i. Refer to Section IX for the Counting of Ballots procedures. [Revised 6/04, 6/10]

### 4. **Electronic Online Voting**

- a. Chapters and/or a Service Center Council (SCC) wishing to use electronic/online voting shall confer with the CTA Elections and Credentials Committee Chair or designee prior to initiating any electronic/online voting. The CTA Elections Chair or designee shall provide the Chapter and/or SCC with the contact information for CTA approved vendors and related concerns as reflected in this section. [Revised 1/13, 6/13]
- b. **The electronic/online voting vendor does not replace the Chapter/SCC's elections committee.** The Chapter and/or SCC shall appoint a standing elections committee in accordance with these *Requirements for Chapter Election Procedures*. [Revised 6/13]

1. The committee shall be appointed and recorded in the Chapter and/or SCC minutes.
2. The members of the committee shall not be current voting members of the governance body; shall not be a candidate, or a member of a candidate's immediate family. *[Revised 6/15]*
- c. Elections training shall be scheduled with and conducted by the CTA Elections and Credentials Committee for, at a minimum, the local chapter president and elections committee chair or the SCC Chair and SCC elections committee chair prior to conducting elections utilizing electronic voting. *[Revised 6/14]*
- d. Any Chapter or CTA Service Center Council (SCC) that elects to conduct electronic/online voting shall be required to meet the following additional minimum standards in the election procedures: *[Revised 6/13]*
  1. Electronic/online voting shall not create a situation where an eligible member is denied a means to vote in the election. The Chapter and/or SCC shall ensure that there is an alternative ballot procedure for use by those members who (a) cannot access and use an electronic/online environment; (b) who do not have the equipment necessary for electronic/online activities; (c) do not wish to vote electronically/online. The alternative ballot procedure shall comply with one of the methods as identified in this Section IV-9, Voting Procedures for State Council Representatives and Alternates.
  2. Any Chapter and/or SCC that has made the decision to conduct an electronic/online election in accordance with these requirements shall conduct elections using only a CTA approved company in order to protect the Chapter's/SCC's membership information. Any costs associated with the work done by a CTA approved company shall be borne by the Chapter/SCC. *[Revised 6/12, 6/13]*
  3. The Chapter/SCC shall notify the Elections and Credentials Committee of the name of their chosen vendor.
  4. Should the CTA Elections Committee discover during the course of certifying a State Council representative and/or alternate election that a chapter/SCC did not use a CTA approved electronic voting vendor to conduct the election, the election shall be immediately declared null and void and the chapter/SCC will be required to re-run the election using a paper ballot. *[Revised 1/14]*
  5. Any challenge filed in an electronic/online voting election which does not reflect the use of one of the CTA approved vendors by any chapter and/or SCC shall have the election immediately declared null and void and the election will have to be re-run on a paper ballot.
  6. CTA strongly discourages the use of a school district's Internet system, lines, and equipment for electronic/online voting. *[Revised 6/14]*
  7. Chapters and/or SCCs shall adhere to all elections requirements as defined in the *CTA Elections Manual* and *Requirements for Chapter Election Procedures*.
  8. Chapter and/or SCC election instructions for both electronic/online and paper ballot shall be distributed to the chapter voting members using both electronic/online and paper communication as established by the Unit's governance documents.
  9. All records involved with any electronic/online vote conducted by the Chapter/SCC shall be maintained in a hard copy as well as electronically, and should be retained by the local for one year after the election, in order that any challenge filed to an election which is conducted in an electronic/online environment can be properly processed in accordance with CTA Elections Challenge Procedures. *[Revised 6/12, 6/13]*

## **IX. Vote Requirement**

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

1. Majority means more than half of the legal votes cast for each office/position on the ballot.
2. A plurality vote means the largest number of votes to be given any candidate or issue. When there is a tie in a plurality election and it is not feasible to conduct the election again because of the time factor, the following procedure shall be followed:

- a. When there is a tie, the ballots shall be recounted.
- b. If the result is still a tie, the elections committee chairperson shall:
  - 1) Call the candidates (according to the CTA alphabet) and inform them of the tie and that a coin toss shall be used to determine the winner.
  - 2) If the first candidate called wishes to remain in the race, the chairperson shall ask that candidate to choose “heads” or “tails” in the coin toss.
  - 3) The elections committee chairperson shall designate the time and place for the coin toss and inform the candidates, who may have an observer present. The observer may be the candidate.
  - 4) The elections committee shall note the coin toss on the Unit’s Official Teller’s Report.
  - 5) The elections committee shall follow the established procedure in notifying the candidates of the results.
3. A two-thirds (2/3) vote means at least two-thirds (2/3) of the legal votes cast.
4. For unit officers, and at-large members of the Executive Board, the election will be by majority vote. The ballot must not be waived. [Revised 6/14, 6/15]
5. An election for school site representatives may be waived and the candidate(s) declared elected if, following a period of open nominations, the number of candidates is equal to or less than the number of delegate positions to be filled. An affiliate utilizing this provision must have adopted a governing provision or election policy allowing such a practice. [Revised 6/14]
6. For State Council: *(See the Election Timelines, Procedures, and Guidelines in Sections IV-9.2 and IV-9.3 of the CTA Elections Manual)*
  - a. If a unit is a single electoral district or a multiple unit electoral district, the election for State Council Representative will be by majority vote.
  - b. If the unit is within a multiple unit electoral district, the Service Center Council (SCC) elections committee will determine if a candidate has received a majority vote. For multiple electoral districts, the chapter elections committee returns a signature and ballot verification sheet *(see Appendix M)*, voted ballots, and voter roster/sign-in sheets to the SCC elections committee by deadline date. [Revised 6/11, 6/12]
7. If a candidate does not receive a majority vote, a run-off election shall be conducted among the candidates receiving the highest number of votes. The names on the ballot will be one (1) more than the number of vacancies to be filled. **There shall be no provisions for write-in candidates in run-off elections.** A majority vote is required to win a run-off election. [Revised 6/13]
8. For NEA Local Delegates, the election will be by plurality vote. Results must be sent to the CTA Governance Department and to the Service Center Council. [Revised 6/13]
9. An election for NEA Delegates may be waived and the candidate(s) declared elected if, following a period of open nominations, the number of candidates is equal to or less than the number of delegate positions to be filled. An affiliate utilizing this provision must have adopted a governing provision or election policy allowing such a practice. This election practice will not generate successor delegates unless the nomination process requires candidates for both regular and successor delegate positions.
10. For NEA State Delegates, the election will be by plurality vote. Successor delegates (alternates) are ranked in the order of votes received. Voted ballots, signature sheets/rosters, and a signature and ballot verification sheet *(See Appendix M)* must be submitted to the Service Center Council, which will tally all the ballots and report the results to CTA. [Revised 6/12]
11. For additional CTA/NEA election guidelines refer to the official *CTA Elections Manual*. [Revised 7/03, 6/14]

## X. Counting of Ballots

1. Each candidate may designate one observer, who may be the candidate, to observe the vote counting process. The observer shall not interfere with the work of the Elections Committee and must remain in the room where the vote count is taking place. Electronic devices of any kind (cell phone, computer, tablet, etc.) are not allowed in the counting area. [Revised 6/04, 6/05, 6/13]
2. The Elections Committee shall verify signature sheets with ballots received, which should be completed immediately following the deadline for receipt of voted ballots. [Revised 6/04, 6/09]

3. Ballots set aside and not counted are:
  - a. More ballots than signatures;
  - b. Ballot(s) submitted after deadline;
  - c. Voting envelopes without a signature; and
  - d. Ballots that are separated from voter roster/sign-in sheet. [Revised 6/13]
4. After verification of signatures, ballots shall no longer be separated by site. [Revised 6/11]
5. Each office/position on the ballot shall be treated as a separate race. Therefore it is possible that blank or illegal ballots for one race may still be counted in remaining positions on the ballot. [Revised 6/10]
6. Blank and/or illegal ballots for each office/position shall be set aside. Examples include the following:
  - a. Member not verified;
  - b. Voter's intent unclear;
  - c. Votes cast for more than number allowed;
  - d. Votes cast on unofficial ballot (probably reproduced); and
  - e. Candidate is not a member. [Revised 6/10]
7. The Elections Committee should categorize each illegal ballot, make a determination on whether the vote(s) in that category should be counted separately, as listed in 6(a-e) above, and make a note of the decision. The ballots should remain separate.
8. 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.
9. 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 no later than five (5) calendar days following the counting of the ballots. Specific to County office of Education chapters only – election results shall be posted electronically as soon as possible following the election. [Revised 6/10, 6/11]
10. The ballots and voter sign-in sheets/signed envelopes should be retained by the unit for one year after the election. [Revised 6/15]

## **XI. Challenge Procedure**

1. A challenge cannot be initiated until after the ballots have been counted, including any run-offs if necessary. [Revised 6/13, 6/15]
2. Challenges for election of State Council Representatives, Alternates, State, and Local delegates to the NEA RA follow procedures in the *CTA Elections Manual*. A challenge to a NEA RA State or Local delegate election is to be filed with the CTA President at [ctaelections@cta.org](mailto:ctaelections@cta.org) only. [Revised 6/15, 6/17]
3. Challenging party(ies) must notify the elections chair of a challenge in writing, using the official Original Election Challenge Form (*See Appendix N*), no later than fifteen (15) calendar days after the counting of the ballots. In the event any office/position on the ballot requires a run-off, a challenge may only be filed in writing no later than fifteen (15) calendar days after the counting of the run-off ballots. [Revised 7/03, 6/08, 6/09, 6/13, 6/15]
4. Upon receipt of the challenge, the unit's Elections Committee will notify all the candidates that a challenge has been filed. The names of challengers, details of the challenge, and challenge forms shall remain confidential. Within ten (10) calendar days after the challenge deadline, the Elections Committee shall determine if the challenge is valid, using the following procedures:
  - a. Read and understand the elements of the challenge.
  - b. Review all documents, directions, and procedures related to the election in question for conformity with the chapter's election rules and/or the *CTA Elections Manual* requirements.
  - c. Review the unit's bylaws and election standing rules for procedures and practices as they relate to the issues raised in the challenge.
  - d. Review the *CTA Elections Manual* for requirements that relate to the issues raised in the challenge that the chapter's governance documents do not address.

- e. Fully and objectively interview the challenger.
  - f. Fully and objectively interview every witness identified by the challenger.
  - g. Inquire and gather the names and contact information of other chapter members who could or do have insight into the elements of the challenge.
  - h. Analyze the issues of the challenge based on the unit's bylaws and election standing rules to determine if there is a violation.
  - i. Determine whether identified violation(s) may have affected the outcome of the election.
  - j. Confirm that the resolution recommendations address each point raised by the challenger and that these recommendations have been reached in a fair and objective manner.
  - k. Submit a written report including issues, findings, and recommendations to the chapter president and the Executive Board within the same ten (10) calendar day period. *[Revised 6/12, 6/15]*
5. Any member of the Executive Board/Representative Council who was a candidate in the office/position that has been challenged, was named in the challenge, member of the elections committee, signed an individual witness documentation form, or whose immediate family member is a candidate in the office/position that has been challenged, shall recuse themselves from discussion of and voting on the challenge. *[Revised 6/14, 6/15]*
  6. If in the case where the majority of the Executive Board is unable to act on the challenge the decision shall move to the Representative Council. In the absence of a Representative Council, the unit shall contact the CTA Elections and Credentials Chairperson through the Governance Support Department to determine the next step. *[Adopted 6/05, Revised 6/11, 6/12]*
  7. The governance body shall render a decision and issue that decision in writing to the challenging party and all candidates on the ballot 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 Challenge Procedures – Local /Service Center Council Elections on the next page. The names of challengers, details of the challenge, and challenge forms shall remain confidential. *[Revised 6/05, 6/06, 6/08, 6/13, 6/15]*
  8. If the governance body fails to act within twenty (20) calendar days of the original challenge deadline, the challenging party may file an appeal on the official CTA Appeal Form to the CTA President at [ctaelections@cta.org](mailto:ctaelections@cta.org). *[Revised 6/15, 6/17]*
  9. The challenging party or candidate for the office/position being challenged affected by the decision of the unit's governance body may file an appeal on the official CTA Appeal Form to the CTA President at [ctaelections@cta.org](mailto:ctaelections@cta.org) within ten (10) calendar days from the date of the decision of the unit's governance body. The appeal shall include the information requested on the official CTA Appeal Form located in Appendix O. *[Revised 7/12, 6/13, 6/15, 6/17]*
  10. Upon receipt of an appeal, the CTA Elections and Credentials committee chairperson will send a request to the chapter for information pertaining to the election. The chapter will have a maximum of fourteen (14) calendar days from the date of the request to submit the information. In the event the chapter does not submit the information, the CTA Elections and Credentials committee will proceed with their investigation using only the information submitted by the individual(s) appealing the chapter's decision. *[Revised 6/15]*
  11. In the circumstance where an election has been conducted to elect one or more officers, and the elections results are challenged, the winner(s) of the election shall hold office until such time as the challenge is resolved. *[Revised 6/04]*

## **CTA Challenge Procedures – Local/Service Center Council Elections**

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

### **Local/Service Center Council Level**

Challenge filed at local unit level following local unit procedures provided in local governance documents no later than fifteen (15) calendar days after the counting of the ballots.

### **Local Election Committee**

The local election committee has ten (10) calendar days after the challenge deadline to investigate and report their recommendations to the unit’s governance body based on the results of the investigation.

### **Local Governance Body**

The local governance body has ten (10) calendar days to render a decision and to issue that decision in writing to the challenging parties, all candidates on the ballot, and the elections committee chair.

### **CTA Level**

If the governance body fails to act within the ten (10) calendar days, the challenging party(ies) may file an appeal on the official CTA Appeal Form to the CTA President at [ctaelections@cta.org](mailto:ctaelections@cta.org) who shall refer the challenge to the Chairperson of CTA Elections and Credentials Committee.

The challenging party or candidate for the office/position being challenged affected by the written decision of the unit’s governance body may file an appeal on the official CTA Appeal Form within ten (10) calendar days from the date of the decision of the unit’s governance body to the CTA President at [ctaelections@cta.org](mailto:ctaelections@cta.org) who shall refer the challenge to the Chairperson of CTA Elections and Credentials Committee. Such appeal shall include the information requested on the official CTA Appeal Form.

The challenge appeal and all required documentation shall be received by the CTA President at [ctaelections@cta.org](mailto:ctaelections@cta.org) no later than 5:00 P.M. on or before the tenth (10<sup>th</sup>) day.

### **CTA Elections Committee Level**

The CTA Elections and Credentials Committee investigates the challenge and determines actions to be recommended to the President. At the direction of the CTA President, the CTA Elections and Credentials Committee initiates appropriate action and submits a report of findings and recommendations to the CTA President and the CTA Board.

### **CTA Board of Directors Level**

CTA Board shall send approved directives to the Local President/Service Center Council Chairperson, and to the appealing party(ies). The CTA Elections and Credentials Committee report to the Board and documents obtained in regards to the challenge are confidential.

### **Monitoring**

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

### **CTA Geographic Director Level**

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

### **Follow-Up Contacts**

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

### **CTA President and CTA Board of Directors**

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

*[Revised 6/04, 6/06, 6/08, 6/10, 7/12, 6/13, 6/15, 6/17]*

## **XII. Initiative Procedures**

1. The active membership shall have the authority to make decisions on any matters affecting the Association or its activities through the initiative process.
2. A member shall file a notice of the intent to circulate a petition with the chapter president by including a copy of the petition to be circulated, and the names of at least three persons supporting the proposed measure and responsible for its circulation.
3. The chapter president shall register the receipt of the notice of the intent to circulate, and acknowledge such registration in writing with the member filing the notice.
4. The timeline for gathering signatures will commence the day that the notice of intent is registered. A maximum of fifteen (15) calendar days shall be permitted to obtain the signatures of at least sixty percent (60%) or more of the active members of the chapter. The petition shall contain the question proposed to be placed on the ballot.
5. The circulators shall present to the chapter president the petition(s) containing original signatures.
6. The chapter president shall have thirty (30) calendar days in which to verify the membership of the signers of the petition.
7. If there are insufficient signatures, the petition circulator will be notified within three (3) calendar days, that the petition failed for a lack of signatures.
8. The chapter president shall cause a ballot to be furnished to the members no less than fifteen (15) calendar days after verification of membership, provided that the period that school is officially not in session shall not be included in this count.
9. Regular election procedures (e.g., election of officers) shall be followed including voting times.
10. The proposal shall take effect immediately upon receipt of the required number of votes, unless otherwise specified. *[Revised 6/13]*

## **XIII. Referendum Procedures**

1. Any action or proposed action of the Representative Council or the Executive Board shall be referred to a vote of the membership upon two-thirds (2/3) vote of that body at any valid meeting.
2. The referendum action shall prescribe the exact wording of the question to be posed to the membership on the ballot.
3. The chapter president shall cause a ballot to be furnished to the members no less than fifteen (15) calendar days and no more than thirty (30) 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. *[Revised 6/12]*
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. *[Revised 6/10, 6/13]*

## **XIV. Recall Procedure**

1. The Active membership shall have the authority to recall from office any person(s) having been elected thereto by the Active members. *[Revised 6/13]*
2. Any Active member(s) desiring to recall a unit officer must file a copy of a petition with the chairperson of the Elections Committee before it can be circulated. *[Revised 6/05]*
3. The petition must include the following information:
  - a. Name of individual(s) who is/are the subject of the recall;
  - b. Office of individual(s);
  - c. Date of petition;
  - d. Name(s) of person(s) filing petition and personal email address(es); *[Revised 6/13]*
  - e. Reason(s) for the recall;
  - f. Notation that "Each signature must be in ink"; and
  - g. Space must be provided for the printed name, signature, work site and date of signing for each name on the petition. *[Revised 6/15]*
4. The petition must be filed with and approved by the Chairperson of the Elections Committee. Signature gathering may not begin until the petitioner(s) receive notice from the Chairperson of the Elections Committee. *[Revised 6/13]*



5. Within fourteen (14) calendar days after receipt, the Chairperson of the Elections Committee shall determine whether the petition contains the necessary information. *[Revised 6/15]*
  - a. If the petition does not contain the necessary information, the Chairperson of the Elections Committee shall so notify the petitioner(s). (See number two (2) above.)
  - b. If the petition contains the necessary information, the Chairperson of the Elections Committee shall inform the petitioner(s) of the rules, procedures and timeline (beginning date and deadline for gathering of signatures), and the need for protection of due process rights of the parties.
  - c. The Chairperson of the Elections Committee shall send written notification to the unit officer(s) whose recall is being proposed and shall also notify the other officers of the unit. A copy of the petition shall be enclosed. *[Revised 6/15]*
6. 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.
7. No unit may state or indicate its preference in the unit's newspaper, newsletter, social networking site or other communications to its members. *[Revised 6/15]*
8. 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. *[Revised 6/05, 6/10]*
9. The signed petitions must be received by the Chairperson of the Elections Committee by the specified deadline date.
10. The Elections Committee shall have ten (10) calendar days after receipt of the petition to verify signatures.
11. If there are insufficient signatures, the Chairperson of the Elections Committee shall notify the petition circulator(s) by mail, within five (5) calendar days of verifying signatures that the petition failed for a lack of signatures. *[Revised 6/05, 6/10]*
12. Immediately upon verification of the signatures, the Chairperson of the Elections Committee shall:
  - a. Notify the president/designee of the fact that a recall has been initiated.
  - b. Prepare an election announcement, timeline (in accordance with the requirements for chapter elections), and declaration of candidacy form for replacement officers if recall passes.
  - c. The declaration period must be no less than ten (10) calendar days and no more than fifteen (15) calendar days after verification of signatures. The period that school is officially not in session shall not be included in this count. *[Revised 6/12, 6/13]*
13. When preparing the ballot, please reference Appendix K(a) for a sample. *[Revised 6/13]*
14. The election must be concluded within fifteen (15) calendar days of distribution of the ballots.
15. The election must be conducted with provisions for a secret ballot and voter sign-in sheets, double envelope system or electronic voting. *[Revised 6/13]*
16. The election shall be certified in accordance to the unit's bylaws.
17. The Chairperson of the Elections Committee will deliver the report to the president of the unit who will immediately notify all interested parties of the election results. The election results shall be posted at each work site as soon as possible following the election.

## **XV. Staff Involvement**

Elections and elections procedures are the responsibility of the Association membership, in particular the elections committees. Association staff provides support and assistance to the local and Service Center Council membership and elections committee in meeting these responsibilities. Associate staff assistance shall be in the areas of maintaining a reference copy of the election calendar established by the elections committee, preparing drafts of the various elections documents, and based on the decisions of the elections committee, preparing those documents selected for use by the elections committee for distribution. Professional staff responsibility shall be commensurate with their consultant role to either the local chapter or the service center council. Neither Associate staff nor Professional staff shall take on responsibility for the decision-making or physical handling of the actual elections procedures and processes. *[Revised 7/03]*

## Appendix A – Sample Timeline for Elections

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

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

- April 3 - Announcement of vacancies to members via publications.
- April 25 - Declarations of candidacy must be received in the CTA/XYZ unit office, 123 Main Street, Anytown, no later than 5:00 p.m. on April 25.
- April 28 - Acknowledgment of declarations of candidacy.
- May 1-5 - Preparation of campaign statements, ballots and voter registration roster/sign-in sheets.
- May 8-12 - Distribution of voting materials to work sites and to off track teachers.
- May 15-18 - Voting at individual work sites.
- May 19 - Ballots AND voter roster/sign-in sheets must be received in the unit office by 5:00 p.m. on May 19. (Postmarked date not accepted.)
- May 19 - Ballots will be counted at the unit office on May 19, starting at 5:15 p.m.
- May 20 - Announcement of results to leadership, candidates, members, and posted at each work site, which date shall be not later than five (5) calendar days following the counting of ballots. If a run-off election is necessary, this will be included in the announcement.
- May 22-25 - Preparation of run-off ballots, if necessary.
- May 26-31 - Distribution of run-off ballots, if necessary.
- June 1-5 - Voting for run-off election at individual work sites
- June 3 - A challenge to the election must be received in the unit office no later than 5:00 p.m. unless there is a run-off election.
- June 6 - Ballots AND voter roster/sign-in sheets must be received in the unit office by 5:00 p.m. on June 6
- June 6 - Ballots will be counted at the unit office on June 6, starting at 5:15 p.m.
- June 7 - Announcement of run-off results to leadership, candidates and members
- June 21 - A challenge to the election, including the run-off election, must be received in the unit office no later than 5:00 p.m. (Postmarked date not accepted.)

## Appendix B – Sample Announcement

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

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

### *Sample Announcement*

#### **ANNOUNCEMENT OF ELECTION**

The CTA/XYZ Unit will be holding its election for the offices of Unit President, Unit Vice President, Unit Secretary and Unit Treasurer during the second week of May. Nominations are open (which means that anyone who is a unit member is eligible to nominate any other unit member, including himself/herself for office). The term for each office is from September 1, 201\_, to August 31, 201\_. Anyone wishing to run for office should file a declaration of candidacy form so that it is received at the unit office, 123 Main Street, Anytown, **no later than 5:00 p.m. on Wednesday, April 25, 201\_.** (Postmarked date not accepted.)

**Appendix C – Sample Declaration of Candidacy Form**

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

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

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

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

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

Please print:

Name	_____	
	(As you wish it to appear on the ballot)	
School/Work Address	_____	Home Address _____
City/Zip	_____	City/Zip _____
School/Work Phone	_____	Home Phone _____

This declaration must be received at the CTA/ABC Unit, 123 Main Street, Anytown, **no later than 5:00 p.m. on Wednesday, April 25, 201\_.** (Postmarked date not accepted.)

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

To: Candidate's Name  
From: CTA/XYZ Unit  
Re: Election  
Date: April 28, 202\_

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

The unit will publish campaign statements of candidates to members via a newsletter. Each candidate is eligible to submit a statement of no more than thirty (30) words regarding his/her candidacy. The statement must be received in the CTA/XYZ Unit office, 123 Main Street, Anytown, no later than 5:00 p.m. on Friday, May 5. Please note that the unit will print only the first thirty (30) words (not including your name) of the statement; in the event there are more than thirty (30) words, words thirty-one (31) and on will be omitted.

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

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

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

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

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

*[Revised 6/11]*

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

To: Association Representatives

From: CTA/XYZ Unit

Re: Unit Elections

Date: May 10, 202\_

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

Campaign Statement - one for each member

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

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

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

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

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

Enclosures

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

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

Names are listed in the order of the 2019-2020 CTA Alphabet:

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

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

CTA/XYZ Unit

Campaign statements have been received from candidates for office for 201\_ – 202\_.

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

BROWN, MARY - (statement here)

RED, HERMIONE - (statement here)

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

GRAY, LETITIA- (statement here)

GREEN, DAVID - (statement here)

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

BLACK, ELIZABETH - (statement here)

PURPLE, DAN - (statement here)

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

BLUE, JOHN - (statement here)

WHITE, BEN- (statement here)

ORANGE, BRIGETTE - (statement here)





## Appendix H – Sample Ballot

CTA/XYZ UNIT  
202\_ BALLOT FOR OFFICERS

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

CTA/XYZ UNIT PRESIDENT	VOTE FOR
Term of Office:	ONE
MARY BROWN	<input type="checkbox"/>
HERMIONE RED	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	
CTA/XYZ UNIT VICE PRESIDENT	VOTE FOR
Term of Office:	ONE
LETITIA GRAY	<input type="checkbox"/>
DAVID GREEN	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	
CTA/XYZ UNIT SECRETARY-TREASURER	VOTE FOR
Term of Office:	ONE
ELIZABETH BLACK	<input type="checkbox"/>
DAN PURPLE	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	
CTA/XYZ UNIT AT-LARGE DIRECTOR	VOTE FOR NO
Term of Office:	MORE THAN
	THREE
JOHN BLUE	<input type="checkbox"/>
BEN WHITE	<input type="checkbox"/>
BRIGETTE ORANGE	<input type="checkbox"/>
WRITE-IN CANDIDATE	<input type="checkbox"/>
<hr/>	

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

**Appendix I – Sample Teller’s Report**

**CTA/XYZ UNIT  
Teller’s Report**

	CTA/XYZ Unit President	CTA/XYZ Unit Vice President	CTA/ZYX Unit Secretary-Treasurer	CTA/XYZ Unit At-Large Director (3 seats)
Total Ballots Cast	300	300	300	300
Blank Ballots	10	6	0	6
Illegal Ballots	7	0	0	5
Legal Votes Cast	283	294	300	289
Number of Votes Needed to Elect	Majority 142	Majority 148	Majority 151	Majority 145
Candidates	Mary Brown 175	Letitia Gray 146	Elizabeth Black 100	John Blue 203
	Hermione Red 102	David Green 145	Dan Purple 200	Ben White 146
	Kitty Yellow (Write-in) 6	Colonel Mustard (Write-in) 3		Brigitte Orange 151

Date \_\_\_\_\_ Local Elections Committee Chair \_\_\_\_\_ Member \_\_\_\_\_ Member \_\_\_\_\_

## Appendix J – Sample Announcement of Results

The CTA/XYZ Unit Elections Committee is announcing the results of the election held between May 15-18, 202\_, for Unit Officers for 202\_.

### CTA/XYZ UNIT PRESIDENT:

Total Ballots Cast	300
Blank Ballots	10
Illegal Ballots	7
Legal Votes Cast	283
Number of Votes Needed to Elect	142
<b>Mary Brown - Elected</b>	175
Hermione Red	102
Kitty Yellow (write-in)	6

### CTA/XYZ UNIT VICE PRESIDENT:

Total Ballots Cast	300
Blank Ballots	6
Illegal Ballots	0
Legal Votes Cast	294
Number of Votes Needed to Elect	148
<b>Letitia Gray – Run-off</b>	146
<b>David Green – Run-off</b>	145
Colonel Mustard (write-in)	3

A run-off election will be held between Letitia Gray and David Green since no candidate received a majority of the votes cast on the first ballot.

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

### CTA/XYZ UNIT SECRETARY-TREASURER

Total Ballots Cast	300
Blank Ballots	0
Illegal Ballots	0
Legal Votes Cast	300
Number of Votes Needed to Elect	151
Elizabeth Black	100
<b>Dan Purple - Elected</b>	200

### CTA/XYZ UNIT AT-LARGE DIRECTOR (3 SEATS):

Total Ballots Cast	300
Blank Ballots	6
Illegal Ballots	5
Legal Votes Cast	289
Number of Votes Needed to Elect	145
<b>John Blue – Elected</b>	203
Ben White	146
<b>Brigette Orange – Elected</b>	151

## Appendix K – Sample Recall Petition

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

Reason for recall:

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

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

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

**Each signature must be in ink.**

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

[Revised 6/15]

## Appendix K(a) – Sample Recall Ballot

CTA/XYZ UNIT  
202\_ RECALL ELECTION

### **OFFICIAL BALLOT**

To vote on the recall, place a corresponding mark (“X”, “✓”, etc.) in the box to the left of the word “YES” or “NO”.

To vote for a candidate, place a corresponding mark (“X”, “✓”, etc.) in the box to the left of the name of the candidate for whom you wish to vote. If you wish to vote for a write-in candidate, write in the name space provided and place a corresponding mark (“X”, “✓”, etc.) in the box to the left of the name.

**Shall DAN PURPLE be recalled (removed) from the office of  
CTA/XYZ Unit President upon certification of a majority  
vote to recall the President by the Elections Committee?**

VOTE FOR ONE

YES

NO

**Candidates to succeed DAN PURPLE as  
CTA/XYZ Unit President if he is recalled:**

Term of office:

VOTE FOR ONE

HERMIONE RED

MARY BROWN

WRITE-IN CANDIDATE

\_\_\_\_\_

Voted ballot must be received in the envelopes provided at the CTA/XYZ Unit office, 123 Main Street, Anytown, USA, no later than 5:00 p.m. on May 19. Ballots received after this deadline will not be counted.

**Appendix L – Blank Teller’s Report**

**CTA/XYZ UNIT  
TELLER’ S REPORT**

Total Ballots Cast																			
Blank Ballots																			
Illegal Ballots																			
Reason(s) for Illegal																			
Legal Ballots Cast																			
Votes Needed to Elect																			
Candidate(s):																			
Write-In’ s (If Any)																			

Elections Committee Chair	Member	Member	Member	Member
Member	Member	Member	Member	Member

**Appendix M – Signature and Ballot Verification Sheet**

**Signature and Voted Ballot Verification**

Please attach to voter rosters and ballots from each voting site. Copy if needed.

Signatures on the roster \_\_\_\_\_

Number of **Voted** Ballots Received \_\_\_\_\_

Verified by: \_\_\_\_\_

**[Adopted 6/12]**

## Appendix N – Original Election Challenge Form

Please remember that a challenge to a local chapter/unit must first go to the local elections committee chairperson and local president. If the findings of the local elections committee did not satisfy the challenger(s), within 10 days of those findings, then the exact same challenge may be appealed to the CTA president at [ctaelections@cta.org](mailto:ctaelections@cta.org), along with the official CTA Appeal Form located in Appendix O. (Note: Rules governing state council elections are located in the white manual section of the *CTA Elections Manual*.)

**\*Please note that challenges to any State NEA RA Delegate elections must be filed directly with the CTA President at [ctaelections@cta.org](mailto:ctaelections@cta.org).** (Please use the form located in Appendix R of the *CTA Elections Manual*.)

*In order to file a challenge to a unit election, the challenger(s) shall complete the following items and attach copies of all documents required to support the challenge:*

The challenge as represented in this form, with attachments, shall first be submitted to the unit’s election committee chairperson within the timelines as specified in CTA’s *Requirements for Chapter Election Procedures*.

**I/we wish to file a challenge to an election as follows:**

<b>Challenger 1 Name</b>	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
<i>Personal</i> Email Address:	Fax #:

<b>Challenger 2 Name</b>	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
<i>Personal</i> Email Address:	Fax #:

(If there are additional chapter/unit members challenging the election, please include their information on a separate page & attach.)

Type of Election/Officer position(s) being challenged (check only those that are being challenged):	
<input type="checkbox"/> President	<input type="checkbox"/> Director(s)
<input type="checkbox"/> Vice President	<input type="checkbox"/> State Council Representative
<input type="checkbox"/> Secretary and/or Treasurer	<input type="checkbox"/> State Council Alternate
	<input type="checkbox"/> Local NEA RA Delegate
	<input type="checkbox"/> Other _____
Election Dates: _____	_____
Date(s) Election Held	Date Ballots Counted (Including any run-offs if necessary)



**Witnesses:** Individuals who can serve as witnesses, what they can attest to, and contact information for each:

<b>Witness 1 Name</b>	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
<i>Personal</i> Email Address:	Fax #:

<b>Witness 2 Name</b>	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
<i>Personal</i> Email Address:	Fax #:

(If there are more witnesses, please include their information on a separate page and attach.)

**Chapter Information:**

<b>Chapter Name:</b>	Office #:
Chapter Email:	Fax #:

<b>Chapter President Name:</b>	President's Phone #:
President's Email Address:	

<b>Chapter Elections Committee Chair Name:</b>	Elections Chair Phone #:
Elections Chair's Email Address:	

Attach the following:

1. Cite the local bylaws, standing rules, and/or *CTA Elections Manual* section(s) and then summarize how and when they were violated.
2. Copies of election materials, for example: timelines, instructions, chapter literature related to the election, campaign flyers, etc.
3. Local unit bylaws and standing rules.
4. Individual Witness Documentation form(s) if any witnesses are reported above.

[Revised 6/11, 6/13, 6/14, 6/15, 6/17]

Individual Witness Documentation

**Witness 1** Name (please print) \_\_\_\_\_

**Do you believe you witnessed an election violation?**  Yes  No

If yes, please briefly describe the election violation:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Witness  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_



Individual Witness Documentation

**Witness 2** Name (please print) \_\_\_\_\_

**Do you believe you witnessed an election violation?**  Yes  No

If yes, please briefly describe the election violation:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Witness  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

[Adopted 6/14]

## Appendix O – Official CTA Appeal Form

TO: CTA President, [ctaelections@cta.org](mailto:ctaelections@cta.org)

I/we wish to file an appeal to the decision of my unit's governance body in response to an election challenge. (Please check):  I am the original challenger.

I am not the original challenger, but I am a candidate affected by the decision of my unit's governance body in response to an election challenge.

Appealer Name	Day Phone:
Street #:	Evening Phone:
City/Zip	Mobile Phone:
Personal Email Address:	Fax #:

### Chapter Information:

Chapter Name:	Office phone & email:
Chapter President:	President phone & email:
Chapter Elections Committee Chair:	Elections Committee Chair phone & email:

<b>Type of Election/Officer position(s) being challenged (check only those that are being challenged):</b>	
<input type="checkbox"/> President	<input type="checkbox"/> Director(s)
<input type="checkbox"/> Vice President	<input type="checkbox"/> State Council Representative <input type="checkbox"/> Other _____
<input type="checkbox"/> Secretary and/or Treasurer	<input type="checkbox"/> State Council Alternate
Election Dates:	_____
	Date(s) Election Held
	Date Ballots Counted (including any run-offs if necessary)
Challenge Dates:	_____
	Date Original Challenge Filed with Local
	Date Local Decision was Made
Result of Local Decision: (Check all that applies)	<input type="checkbox"/> Challenge denied <input type="checkbox"/> Challenge upheld <input type="checkbox"/> Election results upheld <input type="checkbox"/> Election to be re-run <input type="checkbox"/> Other: (please specify)

### Attach the following:

1. If you are the original challenger, attach your original challenge form. If you are not the original challenger, you may submit this form by itself.
2. Copies of election materials, for example: timelines, instructions, chapter literature related to the election, campaign flyers, etc.
3. Local chapter executive board's written decision.

[Adopted 6/13, Revised 6/15, 6/17]