





**LOCAL ASSOCIATION ELECTION GUIDELINES**  
(As adopted by the MEA Board of Directors, January 29, 1988,  
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## **INTRODUCTION**

Local association elections must be conducted in conformance with the provisions contained in the governance documents of the NEA and MEA. Further, the election of MEA and NEA RA delegates and alternates by a local association must be conducted in accordance with the provisions of the Landrum-Griffin Act and certain rules and regulations of the U.S. Department of Labor, as well as other state and federal laws.

These guidelines have been compiled from sources in the MEA Constitution, Bylaws, Administrative Policies, and provisions of the Landrum-Griffin Act and other relevant rules and regulations of the U.S. Department of Labor and other state and federal laws.

These guidelines are designed to provide a concise and authoritative reference manual for those who are responsible for the proper and orderly conduct of local association elections.

The MEA and NEA are firmly committed to ensuring that all internal elections are conducted fairly and democratically. This commitment to such democratic principles as open nominations, the secret ballot, and one-person one-vote is of considerable importance to the membership and is one of the major advantages of being a member of the MEA.

By strict adherence to the procedures outlined herein and careful attention to detail, local association elections will be conducted fairly, legally and democratically—thus meeting the expectations of the membership.

The MEA Bylaws provide:

No person shall be a candidate for office or position or hold office or position, whether elected or appointed, in the association or any of its local affiliates unless he or she is an active member in good standing. Any office or position holder, whether elected or appointed, of the association or any of its local affiliates who does not maintain active membership in good standing shall be removed from office after notice and opportunity to return to good standing within thirty (30) days. (MEA Bylaws IV.A.)

### **I. POSITIONS TO BE ELECTED BY THE LOCAL ASSOCIATION**

- A. The local should carefully review its governance structure. Sometimes local governance structures may complicate the successful conduct of elections such as calling for the election of a large number of individuals to a variety of committees. This is usually justified on the grounds that the Association needs to increase member participation. While the goal may be laudable, the large number of positions to be elected may result in a nearly impossible task for those charged with conducting the election. Moreover, it is often difficult to find individuals willing to run for these positions. The local may wish to consider if some of these positions could better be filled by appointment rather than by election.
- B. A great deal of time, effort and some expense is dedicated to conducting local elections, especially when the local diligently attempts to comply with all constitutional and legal requirements. Locals should evaluate the number of elections conducted, the length of terms, the commencement date of terms, and the feasibility of limiting the number of elections conducted. By doing so, the local minimizes the burden of

conducting elections, as well as the chance for disputes over the conduct of these elections.

- C. The following is a list of positions often elected by the local. The local should use its constitution and bylaws to construct a list of elected positions, length of terms, commencement, number of elections, and evaluate the effectiveness of the current structure.
  - 1. Local Officers
    - a. President
    - b. Vice President
    - c. Secretary
    - d. Treasurer
  - 2. Association Representatives
  - 3. Bargaining Team (not recommended)
  - 4. Grievance Chairperson (not recommended)
  - 5. PAC Delegate
  - 6. Region Council Delegate(s)
  - 7. Coordinating Council Delegate(s)
  - 8. MABO Delegate(s)
  - 9. MEA RA Delegate(s) and Alternate(s)
  - 10. NEA RA Delegate(s) and Alternate(s)
  - 11. Representatives of Minority Persons 3-1(g) to Local Governance Bodies
  - 12. Local Board of Directors
  - 13. Committee Chairpersons and/or Members
- D. It is permissible to combine two positions (such as president and MEA RA delegate) as long as the terms of office are identical, the terms commence on the same date and all other requirements, if any, are satisfied. It is mandatory to indicate such combinations on the ballot.
- E. It is recommended that locals give serious consideration to making the local president the first MEA representative assembly delegate from the local. By doing so the local will ensure that its president has familiarity with the state organization and its operation.

## II. LOCAL ELECTION REQUIREMENTS

### A. Requirements for the election of MEA and NEA RA delegates and/or alternates:

1. The election by a local association of MEA and NEA RA delegates and alternates is subject to the requirements of the Landrum-Griffin Act. The election of local officers and other local officials is not subject to these requirements, unless the position is combined with an MEA or NEA RA delegate/alternate position.
2. Violations of the Landrum-Griffin Act election requirements may cause the U.S. Department of Labor or a federal court to order an election to be re-run. This is an expensive, time-consuming process that usually creates hard feelings within the membership of a local. Hence, it is critical that elections are conducted properly.
3. The major Landrum-Griffin Act election requirements include the following:
  - a. Nomination Notification. Notice of positions and term of office to be filled by election must be provided to local MEA/NEA bargaining unit members. The notice must include:
    - (1) The method of nominating or being nominated.
    - (2) Positions to be filled by election.
    - (3) Date, time and place for submitting nominations.
    - (4) A statement that the nominator and nominee must be members in good standing.

This notice may be provided through a local newsletter, posting on bulletin boards in all worksites, mailing through the school email or U.S. mail, or any method that will reasonably ensure that all bargaining unit members receive the notice in time to nominate or be nominated.

- b. Election Notification. All MEA/NEA bargaining unit members must be notified of the date, time and place of the election and the positions to be filled. This notification must be sent through the U.S. mail to their last known home address at least 15 days prior to the election. For example, if the election is to be held on October 20, the election notice must be mailed no later than October 5. The mailing may be third class (bulk rate). This notice may be placed in a local newsletter, as long as it is mailed to the home address of the bargaining unit members.
    - c. The local may not use its resources (money, supplies, etc.) to favor one candidate over another.
    - d. Local election rules and campaign procedures must be applied equally to all candidates.
    - e. The local must honor all reasonable requests to distribute campaign literature at the candidate's expense to all members.

- f. Each candidate has the right to inspect (but not copy) a list of the names and addresses of eligible voters at least once during the 30 days prior to the election. (For a mail ballot election, at least 30 days before the ballots are mailed.)
  - g. The election results are to be published by either announcement, posting, newsletter, or other suitable method or combination of methods of communication.
  - h. In an on-site election, each candidate is permitted to have observers at each polling place and at the counting and tallying of the ballots. The observer may not interfere with the process.
  - i. In a mail ballot election, each candidate is permitted to have observers present at the preparation and mailing of the ballots and at their receipt, opening, counting and tallying. The observer may not interfere with the process.
  - j. All ballots (including spoiled, challenged and unused ballots), envelopes used to return marked ballots, tally sheets, and related election documents must be kept for at least one year.
  - k. Voting shall be by secret ballot.
  - l. Only ballots cast by eligible voters (members in good standing) may be counted. In order to facilitate an accurate list of eligible voters, it is permissible (and recommended by MEA) that a date prior to the election (30 days) be selected as the membership eligibility date. In other words, only members in good standing as of that date would be eligible to vote provided they were still members in good standing when they cast their ballots. In such case, new members in good standing after this eligibility date would be unable to vote. This is a very common practice and avoids the confusion of continually adding members until the date of the election.
  - m. The system of balloting and security of the ballots must be such that the ballots cannot be tampered with. This usually requires a mail ballot election or the use of locked ballot boxes and/or a double envelope system of balloting for an on-site election.
  - n. All eligible voters must be afforded a reasonable opportunity to vote. In some circumstances, this will necessitate providing for absentee ballots.
  - o. Observers should be advised to direct questions, problems or objections to a designated election official.
4. Association requirements for electing MEA RA Delegates/Alternates:
- a. Each local in good standing as determined by the dues transmittal policy and the constitution of the region shall elect to the representative assembly one (1) delegate for each one hundred fifty (150) active and life members and/or

major fraction thereof within the local during the current year with the exception that a local will be allocated one (1) delegate at fifty-six (56) active and life members.

- b. The number of delegates to the Representative Assembly to which each local is entitled shall be computed on the basis of active and life members in good standing in the local as of March 1 of the current year for the Representative Assembly. If the March membership counts results in the loss or gain of a delegate, such loss or gain will be effective immediately. *Administrative Policies, VIII (A) and (B), July 2016.*
- c. Voting shall be by secret ballot and in accordance with the one-person one-vote concept.
- d. Any active member in good standing of the Association may nominate or be nominated for an RA delegate or alternate position.
- e. Every active member in good standing to be represented by the delegate shall have the opportunity to vote.
- f. In the event the number of candidates equals the number of positions to be filled, there is no need for a printed ballot and the candidates can be declared elected by acclamation.
- g. The term of office shall be no less than two or no more than three years commencing September 1 and expiring August 31.
- h. The election shall take place **prior to June 1**; however, special elections may be held at any time to fill vacancies. Only duly elected alternates from the same local shall be designated to fill vacancies in the office of the local delegate to the Representative Assembly.
- i. Results of the election will be transmitted to the MEA. Delegates whose names are transmitted to the MEA Membership Department at least 70 days prior to an RA will receive all RA mailings. Delegates whose names are transmitted less than 70 days prior to an RA shall receive whatever mailings would be reasonably possible given the actual reporting date.
- j. The ballots and other records pertaining to the election shall be preserved for one year.
- k. Each local having four (4), five (5), six (6), or seven (7) delegates will elect at least one (1) of its delegates as a Representative of Minority Persons 3-1(g); eight (8) delegates, at least two (2) Representatives of Minority Persons 3-1(g); nine (9) or more delegates, at least three (3) Representatives of Minority Persons 3-1(g).



5. Association requirements for electing NEA RA Delegates/Alternates:
- a. Each local shall elect one (1) delegate to the NEA Representative Assembly for each 150 active and life members or major fraction thereof.
  - b. Delegates shall be elected in accordance with the one-person one-vote concept.
  - c. The election of NEA RA delegates/alternates will be by secret ballot.
  - d. Each local having three (3), four (4) or five (5) delegates will elect at least one (1) of its delegates as a Representative of Minority Persons 3-1(g); six (6), seven (7) or eight (8) delegates—at least two Representatives of Minority Persons 3-1(g); nine (9), ten (10) or eleven (11) delegates—at least three (3) Representatives of Minority Persons 3-1(g); twelve (12) or more delegates—at least four (4) Representatives of Minority Persons 3-1(g).
  - e. **April 1** is the deadline for election of NEA RA delegates and alternates. However, special elections may be held anytime to fill vacancies. Only duly elected alternates from the same local shall be designated to fill vacancies in the office of the local delegate to the representative assembly.
  - f. NEA RA delegates/alternates may be elected for a one-, two-, or three-year term(s).
  - g. In the event the number of candidates equals the number of positions to be filled, there is no need for a printed ballot and the candidates can be elected by acclamation.

B. Election requirements for other local positions:

- 1. Local officers (as defined by the local constitution and bylaws) shall be elected at least once every three years by secret ballot among the members in good standing. Election results will be transmitted to the local MEA UniServ office within 30 days of the election.
- 2. Each local shall establish, in its constitution and bylaws, procedures for election and recall of elected officers.
- 3. The local shall apply the one-person one-vote concept for representation on its governance bodies.
- 4. A local shall require that Representatives of Minority Persons 3-1(g) be elected so that the number of Representatives of Minority Persons 3-1(g) sitting on its governance body is at least proportionate to its Representatives of Minority Persons 3-1(g) membership.
- 5. Elections shall be conducted with open nominations and a secret ballot. There is no prohibition against filling positions by acclamation when the number of candidates equals the number of positions to be elected.

6. Only members in good standing of the local/MEA/NEA may participate in the election process.

### **III. PRIOR TO THE ELECTION**

- A. The local governing body should thoroughly review its constitution, bylaws, policies, and procedures relating to elections. This review should include a discussion with past members of the election committee. Necessary modifications should be made by the appropriate governance body.
- B. One of the critical election considerations, which should be decided in advance and be detailed in the local governance documents, is the type of election—mail ballot, on-site, or online election. The methods of conducting elections are summarized in Section IV. of these guidelines.
- C. Further, the local should address absentee balloting, campaign procedures, and the voter eligibility list, which are respectively reviewed in Sections V., VI. and VII. of these guidelines.
- D. In accordance with the local constitution and bylaws, the president, with approval of the governing board, should appoint an election committee and chairperson. Some considerations:
  1. Ideally, the committee should be large enough to be able to count and tally the ballots within three (3) to four (4) hours. Depending upon the size of the local, a committee of four (4) to ten (10) members should be adequate.
  2. It is best if the election committee is composed of members who are essentially “non-political,” in other words, not strongly aligned with any particular faction within the local. A candidate or his/her agent should not serve on the committee.
  3. The committee needs to work under a clear set of rules that have been developed in advance of the election and approved by the local governance body. An election committee should not be expected to develop the election procedures prior to each election.
  4. The task of the committee should be to:
    - a. Establish the specific election timeline and dates, if not already included in the election procedure, and communicate these to the local president.
    - c. Implement the election procedure that includes nominations, the election, and the counting and tallying of the ballots.
  5. All members of the elections committee must be members in good standing.
- E. In accordance with the local constitution and bylaws, the president, with approval of the local governing board, should appoint a nomination committee:
  1. The committee should be composed of three (3) to five (5) non-candidates.

2. If possible, in order to avoid a conflict of interest, the members of the nomination committee should not be members of the election committee.
3. The purpose of a nomination committee is to seek nominations for the open positions, especially when there is no announced competition for a position.
4. As with the election committee, the nomination committee should work under a clear set of rules adopted prior to the election.
5. All members of the nominations committee must be members in good standing.

#### **IV. WHAT TYPE OF ELECTION SHOULD YOUR LOCAL CONDUCT?**

A. There are FOUR basic methods of conducting an election:

1. On-site election conducted at all worksites
2. On-site election conducted at central location(s)
3. Mail ballot election
4. Online election

Though a mail ballot election is somewhat more expensive, there is no need for locked ballot boxes, distribution of ballots by election officials at each voting site, or training of election officials. Generally, a mail ballot election is more apt to be conducted properly (less chance for error). Hence, there is less chance of a challenge to the election than with an on-site election.

Since notice of the election must be distributed by U.S. mail to each eligible voter at least 15 days prior to the election, if the ballots are sent along with this notice, the additional expense to conduct the entire election by mail may be minimal. However, a mail ballot election may seem more impersonal to the members and the number of individuals actually voting may decrease versus an on-site election. An on-site election will also involve more members in conducting the election and this participation and ownership may be necessary to the vitality of the local.

MEA is prepared to conduct online voting for any local. This would include local officer, executive committee, bargaining team or building representative elections (candidate elections) to local contract ratifications (non-candidate elections). Local governance documents must allow for online elections or ratification vote before an online election or ratification vote can be conducted.

B. There are two major types for mail ballot elections:

1. U.S. mail
2. School mail (courier service)

Conducting a mail ballot election through the school courier service may be somewhat less expensive than through the U.S. mail. The school courier service may not seem

as impersonal as receiving a ballot at home through the U.S. mail. However, care must be taken to safeguard the ballots in a locked and secure location as they are returned to the local through the school mail. Using the school courier system will probably necessitate a “double envelope” system (see below) in order to protect the integrity of the election. Care must also be exercised to ensure that the “employer’s” mail delivery system is timely and not subject to intentional or unintentional sabotage or carelessness that could necessitate the rerunning of the election.

C. There are two major types of on-site elections:

1. Election is conducted at a central location(s) and voters must travel to that location(s) in order to vote.
2. Election is conducted at each worksite.

An election conducted at a central site or a few centrally-located sites may be less labor intensive and easier to conduct, but is an inconvenience to those wishing to vote. As a result, the percentage of the membership voting will usually decline if members cannot vote in their worksite. However, voting at one site or a limited number of sites will likely reduce the possibility of errors in conducting the election. Other than in extremely small locals, balloting at a central site is not recommended.

D. If the election is conducted at each worksite, there are two major choices in terms of how ballots are distributed and cast:

1. The election official at each worksite is provided a list of all eligible voters at that worksite, personally delivers the ballot to each voter, and either checks the name off the eligibility list or has the individual sign for it. Care must be taken not to have an individual on two worksite lists (especially a problem for members assigned to two or more worksites) or the individual may be given two ballots. Also, this method prohibits distribution of ballots by placing them in school mailboxes as there is no control over the ballots and it is possible that one person could receive and cast more than one ballot. The election official then must turn in unused ballots and they must be checked against the total issued and the number distributed. This system may be improved somewhat by numbering all of the ballots, but is a burdensome and often expensive task, especially for larger locals.
2. The “double envelope” system. The election official at each worksite distributes the election materials to all voters. There is no need to distribute them personally or to check the names off a list or to have them signed for by the voter. This is because the voter marks the ballot, seals the ballot inside an envelope marked “secret ballot” and then places the “secret ballot” envelope in an outside envelope. The voter must then sign the outside of the envelope before placing it in the ballot box. When the ballots are counted, the signatures are first checked against a master list to ensure that the individual was an eligible voter and only voted once. The outside envelopes are then set aside and the “secret ballot” envelopes are placed in a pile and then opened, thus ensuring the secrecy of the ballots.

The double envelope system is preferred. Though it is slightly more costly and requires somewhat more preparation, it is easier to distribute, eliminates individuals voting twice and eliminates the possibility of counting the ballot cast by

an ineligible voter. It also eliminates any need for numbering of ballots or otherwise maintaining such strict control over unused ballots as the first option.

- E. The recommended method is to conduct the election at each worksite using the double envelope system. This is somewhat less expensive than a mail ballot, is likely to enhance voter turnout, provides for participation by a larger number of members, and the double envelope system helps ensure the integrity and secrecy of the balloting process.

## **V. ABSENTEE BALLOTS**

- A. The local governance documents or election procedures should address the issue of absentee ballots. Do not wait for the question to be raised during the election process. (Out of a sense of fairness, it may be reasonable to permit absentee ballots for all local elections, with some restrictions.) It may be a lose-lose situation when this type of decision has to be made once the election process is underway. What frequently happens is that one of two candidates wants a member to be able to vote by absentee ballot and the other candidate believes absentee ballots should not be allowed because they were not provided for in the election procedures.
- B. Absentee ballots must be permitted when electing MEA or NEA RA delegates and alternates as the federal law mandates that all eligible voters have a reasonable opportunity to vote.
- C. Absentee ballot requirements might include:
  - 1. Requests for absentee ballots shall be received by the local no later than \_\_\_\_ days prior to the first day of the election.
  - 2. Eligible voters who are not able to vote on site during the election period may notify the election chairperson of their need to vote by absentee ballot. The request must be in writing, must include the specific reason necessitating an absentee ballot and must be timely received by the election chairperson.
  - 3. Absentee ballot provisions are not for convenience, but rather are to provide a method of voting for someone who would otherwise not be able to cast a ballot. Absentee ballots will not be issued where it is determined by the election chairperson (or election committee, if preferable) that the member requesting an absentee ballot could reasonably make arrangements to vote on site.
  - 4. Eligible voters meeting the above requirements will be provided an absentee ballot by the election committee.
  - 5. Absentee ballots must be returned to the election chairperson prior to the first day of the election.
  - 6. Note: Absentee ballot arrangements are not normally available for voters who become ill or injured just prior to the election. This is true for partisan elections and elections conducted by the Michigan Employment Relations Commission and the National Labor Relations Commission. Absentee ballots are normally for those

individuals who know significantly ahead of time that they will not be able to vote on site.

7. If it appears to the election chairperson (or committee) that the person requesting the absentee ballot is not an eligible voter, is actually reasonably able to vote on site, or for some other reason may not be eligible to vote by absentee ballot, then the election committee shall:
  - a. Provide an absentee ballot to the individual.
  - b. In writing, explain the concern and ask that any necessary clarification be provided by a given date prior to the election and that it is possible that the individual's ballot will be challenged and set aside when the ballots are counted.

## **VI. CAMPAIGN PROCEDURES**

- A. Campaign procedures should be included in the local governance documents or election procedures.
- B. Campaign procedures might include:
  1. Candidates shall not use Association funds or anything of value to directly or indirectly finance their campaigns.
  2. Candidates shall not use Association assets, facilities, supplies and equipment for their campaigns.
  3. Candidates shall not use Association release time or Association business days for campaign activities unless it is provided equally to all candidates.
  4. Candidates should be informed of the procedures for distributing literature in advance.
  5. Biographical statements may be printed by the Association, at Association expense, and distributed to the membership in a newsletter or informational flyer prior to the election so long as each candidate is treated equally. The following provisions apply to biographical statements:
    - a. Biographical statements will be limited to \_\_\_\_ words and shall be reproduced as received, including grammatical and typographical errors. The statement must be in paragraph form; pictures and lists will not be printed.
    - b. Biographical statements must be submitted to the election chairperson no later than \_\_\_\_ days prior to the election.
    - c. Biographical statements will not be edited; however, statements that may cause a legal liability for the Association or are not in good taste will not be printed. In such instance, this shall not constitute a valid challenge to an election.

6. The Association will distribute, at the candidate's expense, one or more additional sets of materials in accordance with the following:
  - a. The materials are submitted to the election chairperson no later than \_\_\_\_ days prior to the election.
  - b. The materials are ready to be mailed with the exception of an address.
  - c. The Association's responsibility shall consist of affixing mailing labels or addresses and depositing them in the U.S. mail.
  - d. The Association may refuse to distribute materials that may cause a legal liability for the Association or are not in good taste. In such instance, this shall not constitute a valid challenge to an election.

## **VII. LIST OF ELIGIBLE VOTERS**

- A. It is necessary in all elections to have a voter eligibility list. The list should contain the names and home addresses of the individuals eligible to vote in the election. It may be helpful if the list also designates the worksite of each individual. The list of eligible voters should be in alphabetical order to assist those who are counting the ballots at the conclusion of the election.

IMPORTANT: the voter eligibility list for a local association must be obtained by requesting the local's UniServ office field assistant run the appropriate report from the membership system that provides membership information.

- B. Each candidate has the right to inspect (but not copy) the list of names and addresses of eligible voters at least once during the 30 days prior to the election. (For a mail ballot election, at least 30 days before the ballots are mailed.) Candidates must be treated equally.
- C. It is necessary to determine the eligibility date by which an individual must have been a member in good standing in order to be able to vote in the election. It is suggested that the eligibility date be 30 days prior to the election. This will allow ample time to compile an accurate list of voters and to avoid last minute confusion by attempting to add and delete names a day or two prior to mailing ballots or prior to the start of the on-site election. This will also allow ample time to correct the list if errors are discovered.
- D. Remember, in order to vote an individual must be a member in good standing as of the eligibility date established, as well as a member in good standing when casting a ballot.
- E. As ballots are distributed and counted in accordance with the names contained on the eligibility list, careful preparation of the list will help to avoid one of the most common errors causing elections to be rerun.
- F. If a candidate is permitted to use the membership list for any purpose other than inspection (such as copying), the local must inform all candidates of the availability of the list for that other purpose and give the same privilege to all candidates who request it.

## **VIII. ELECTION CHECKLIST - OPTION #1**

### **ON-SITE ELECTION CONDUCTED AT ALL WORKSITES**

This checklist and sample election procedure is for an election that will be conducted at every worksite. The example also assumes that MEA or NEA RA delegates and/or alternates will be elected, which necessitates adherence to the various federal requirements in conducting the election. If not electing an MEA or NEA RA delegate and/or alternate, the notification by U.S. mail may be eliminated.

### **SAMPLE TIMELINE – ALL WORKSITES**

Develop a comprehensive timeline to include specific dates:

November 1	Appoint election committee and nomination committee
December 15	Construct an election timeline
	Review timeline with president
January 2	Mail (U.S. mail) to home address of each bargaining unit member:
	- Date(s) and time(s) of election
	- List of positions to be elected
	- Nomination information
	- Absentee ballot provisions
	- Timeline about voter eligibility
February 1	Close of nominations
February 7	Candidates submit biographical information
February 7	Briefing meeting with candidates
March 1	Voter eligibility cut off (must be a member in good standing by this date)
March 1	Announce candidates and election details in local newsletter
March 7	Ballots, envelopes, biographical information, and all election materials printed
	make sure ballot cannot be fraudulently reproduced
March 14	Assemble and package election materials
March 25-26	Train election officials and distribute election materials
March 30	Deadline for return of absentee ballots
April 1	Election at each worksite
April 1	Count ballots
April 1	Deadline for election of NEA RA delegates
April 6	Report election results
April 7	Send election result forms within 30 days of election as indicated in Counting and Tallying the Ballots, paragraph N, page 19.
April 10	NEA's Annual Representative Assembly of the NEA delegate and/or successors form due to MEA Executive Office
June 1	Deadline for locals to hold MEA RA delegate election, except for special elections, which may be held at any time

### **NOMINATIONS – ALL WORKSITES**

\_\_\_ A. The election committee should be responsible for the nominations process.

\_\_\_ B. Typical methods of nomination include:



- ☐ 1. At a membership meeting.
  - ☐ 2. By petition. (There is no need to require a specific nomination form. Be cautious about requiring too many signatures or instituting other requirements.)
  - ☐ 3. By written notification.
  - ☐ 4. Combination of the above.
- ☐ C. Notification of nomination needs to be made reasonably available to all bargaining unit members. Typical methods of notification include:
- ☐ 1. Posting of notice on bulletin board in all worksites.
  - ☐ 2. Placement in local newsletter.
  - ☐ 3. Announcement at meeting(s). (If this is the only option used, the meeting announcement would need to be distributed to all bargaining unit members, along with a statement that nomination information would be disseminated at the meeting. This option should be used in conjunction with one of the other methods.)
  - ☐ 4. Mailing to each bargaining unit member at home. (Since notice of the election needs to be sent to the home address of each member through the U.S. mail if electing MEA or NEA RA delegates, the notification of nominations could be included with this mailing.)
  - ☐ 5. Email of nomination notice to all bargaining unit members.
  - ☐ 6. Combination of the above.
- ☐ D. The nomination information provided to bargaining unit members must include:
- ☐ 1. Positions to be elected.
  - ☐ 2. Specific method of nominating and being nominated.
  - ☐ 3. Date, time and place for submitting nominations.
  - ☐ 4. A statement that the nominator and nominee must be members in good standing.
- ☐ E. A member in good standing nominated for a position should not be considered an official candidate until he/she has accepted the nomination. It is recommended that this acceptance or rejection be in writing.
- ☐ F. It is critical that no nominations be accepted after the nomination deadline has passed. Otherwise, an opposing candidate who was timely nominated would have a valid objection to the election.

- \_\_\_ G. Once the nomination information has been provided to the bargaining unit members, the nomination committee can begin soliciting candidates.
- \_\_\_ H. In this example, the nomination information is sent along with the notice of election by U.S. mail to all bargaining unit members. See Appendix A for sample letter.

### **ELECTION PROCEDURE – ALL WORKSITES**

- \_\_\_ A. Construct an election timeline. This should be as detailed as possible (more detailed than the sample). At the same time, it is helpful to decide who will do what and when.
- \_\_\_ B. Review the timeline with the president. This is not required, but it may prove helpful to have the president or someone else officially review your election plans.
- \_\_\_ C. Through the U.S. mail, send to the last known home address of each bargaining unit member the following information (see Appendix A for sample letter). If you have enough members, you may get a bulk rate mailing permit from the post office and save postage costs.
  - \_\_\_ 1. List of positions to be filled by election.
  - \_\_\_ 2. Date(s), time(s) and location of the election.
  - \_\_\_ 3. Nomination information:
    - \_\_\_ a. Explanation of how to be nominated.
    - \_\_\_ b. Date, time and place to submit nominations.
    - \_\_\_ c. A statement that the nominator and nominee must be members in good standing.
  - \_\_\_ 4. Due date for receipt of biographical information.
  - \_\_\_ 5. Explanation of absentee ballot procedure.
- \_\_\_ D. In addition, it may be helpful to provide this information in a local newsletter or post a notice on bulletin boards. These cannot replace the required election notification through the U.S. mail.
- \_\_\_ E. Prepare a list of all worksites and the election official(s) who will be responsible for conducting the election at that site, as well as the election times. All eligible voters (members in good standing) must have a reasonable opportunity to vote.
- \_\_\_ F. It is usually helpful to meet with the candidates and review the election procedures and to answer questions.
- \_\_\_ G. Obtain the voter eligibility list which, at a minimum, must include the names and home addresses of those who were members in good standing as of the eligibility cut-off date. Any members on leave or layoff are not eligible unless they have continued their membership and are in good standing as of the eligibility cut-off date and date of the

election. It is most helpful if this list is in alphabetical order and includes the assigned worksite of each member.

- \_\_\_ H. Once the list is prepared, it may be a good idea to inform the candidates that they have a right to review (not copy) the list. Also, an opportunity to review the list prior to the election may help prevent complaints after the election.
- \_\_\_ I. Though an earlier election announcement was mailed to all bargaining unit members, it is recommended that another notice of election be provided to all eligible voters a couple of weeks prior to the election. There is no need to send this one through the U.S. mail and may be in the local newsletter, or by email. Include:
  - \_\_\_ 1. Candidates for each position.
  - \_\_\_ 2. Date(s), time(s) and locations of election.
  - \_\_\_ 3. A statement that to be eligible to vote you must be a member in good standing as of the eligibility date and of the date of the election.
- \_\_\_ J. Prepare all election material in advance:
  - \_\_\_ 1. Instructions for election officials.
  - \_\_\_ 2. Ballots.
  - \_\_\_ 3. Secret ballot envelope. The usual size of the "secret ballot" envelope is 3-7/8" x 8-7/8" (No. 9) and the words "secret ballot" are printed in large letters on the front of the envelope.
  - \_\_\_ 4.. Outside envelope. The usual size of the signature envelope is 4-1/8" x 9-3/8" (No. 10). The back of the envelope has a signature line and statement:

This is to certify that I marked the enclosed ballot.

\_\_\_\_\_  
(Signature)
  - \_\_\_ 5. Biographical information.
  - \_\_\_ 6. Tally sheet for counting ballots.
- \_\_\_ K. Assemble and package material for distribution to the election official(s) at each site.
- \_\_\_ L. Train election officials and provide them with all the needed election materials. Especially for large locals, two training sessions will help ensure that all election officials have an opportunity to be trained and to receive the election materials for their worksite. These sessions should be scheduled a few days prior to the election in case it is necessary to deliver materials to election officials who did not attend the training session(s).

- \_\_\_ M. Ballots and election materials are distributed to all eligible voters at each site by the election official(s). It is critical that every eligible voter receive a ballot and the related material. As the “double envelope” system is being used, it is permissible to place the balloting materials in school mailboxes. It is still best to personally deliver this material to each voter.
- \_\_\_ N. It may be helpful to provide each election official with the names of eligible voters at his/her worksite to help ensure that all eligible voters receive the election materials.
- \_\_\_ O. The double envelope system eliminates the need to have voters sign for their ballot materials, eliminates the need for ballot numbering, and eliminates the need for strict accountability of ballots. Using this system, the voter:
  - \_\_\_ 1. Marks the ballot.
  - \_\_\_ 2. Places the ballot in an envelope which is marked “SECRET BALLOT” on the outside.
  - \_\_\_ 3. Places the “SECRET BALLOT” envelope in an “outside envelope” and signs the outside envelope. The outside envelope should contain a place for the signature as well as a note that if the envelope is not signed, the ballot will not be counted. It is also helpful if there is a line for the voter to print his/her name. The printed name will speed up the counting process wherein the signature is checked against the voter eligibility list.
  - \_\_\_ 4. Places this “outside envelope” in the ballot box during the voting period. There is no need to have the election official check off the name of those who are casting their ballots.
- \_\_\_ P. Ballots are cast during the announced voting times. The election official should be present during voting.
- \_\_\_ Q. Ballots must be cast in a locked and secure ballot box. During times when balloting is not actually taking place, the ballot box may be placed in a secure location (locked in a room, car, locker, etc.) and does not need to be in the physical presence of the election official except during voting times. It is permissible for the election official to take the ballot box home for safe keeping.
- \_\_\_ R. Election officials should not be provided with a key to the ballot box. The keys should remain in the possession of someone who is not a candidate and who is not an election official—perhaps the election chairperson.
- \_\_\_ S. The election official transports the ballot box to the location designated for the counting of the ballots.

## COUNTING AND TALLYING THE BALLOTS – ALL WORKSITES

- \_\_\_ A. The counting should be done openly and any member in good standing is allowed to observe the counting process. At least two members of the local election committee should conduct the counting and tallying process. Observers may not interfere with the process.
- \_\_\_ B. Review the voter eligibility list and cross off all names of individuals who were not Association members in good standing as of the time the ballots were cast, even though they may have been members in good standing as of the original eligibility date. To be an eligible voter, an individual must have been a member in good standing as of the initial eligibility date and be a member in good standing at the time of the election.
- \_\_\_ C. Any ballot that is challenged shall be set aside and the reason for the challenge will be written on the envelope.
- \_\_\_ D. Any absentee ballots timely received should be added to one of the ballot boxes. Any untimely ballot should be set aside and marked as a challenged ballot with the reason for the challenge written on the outside of the envelope.
- \_\_\_ E. Unlock and empty all ballot boxes.
- \_\_\_ F. Alphabetize the envelopes by last name.
- \_\_\_ G. Check the signature on the outside envelope against the list of eligible voters.
  - \_\_\_ 1. If the name on the outside of the envelope matches a name on the eligible voter list, place a check by that name on the list and place all such envelopes together.
  - \_\_\_ 2. If the signature on the outside envelope is illegible or the name does not appear on the voter eligibility list, set all such envelopes aside as challenged ballots. THESE BALLOTS ARE NOT TO BE COUNTED AND ARE NOT TO BE OPENED.
  - \_\_\_ 3. If the signature check reveals two or more envelopes from the same individual, set ALL the envelopes from that individual aside as challenged ballots. THESE BALLOTS ARE NOT TO BE COUNTED AND ARE NOT TO BE OPENED.
- \_\_\_ H. Only when all envelopes have been checked against the eligibility list may the count continue. At this time, open the outside envelopes of the VALID ballots, placing the outside envelopes in one pile and the UNOPENED secret ballot envelopes in a separate pile.
- \_\_\_ I. Only when all outside envelopes have been separated from the secret ballot envelopes may the count continue. At this time, set the outside envelopes aside (DO NOT THROW THEM AWAY).
- \_\_\_ J. Open the secret ballot envelopes, placing the ballots in one pile and the secret ballot envelopes in a separate pile. The empty secret ballot envelopes may be thrown away at the end of the count.

- \_\_\_ K. Count the ballots by using the tabulation sheet that the election committee prepared in advance.
- \_\_\_ L. When counting ballots, if a mark is outside the box, if there is an erasure, or if the ballot contains some other discrepancy, the local elections committee must make a judgment as to how or whether to count it. The ballot should be counted if the intent of the voter is apparent and not counted if the intent is unclear.
  - \_\_\_ 1. If a voter makes a mistake in voting for too many candidates for a given office, only the vote(s) for that office should be voided.
  - \_\_\_ 2. If the number of unresolved challenged ballots at the end of the tally could affect the outcome of any race, they must be resolved and, if determined to be valid, must be counted.
- \_\_\_ M. Announce the results to the membership.
- \_\_\_ N. Forward the election result forms within 30 days of the election as follows:
  - **Local Officer results** must be reported to the UniServ office that services the local using the Officer Report Form, Official Report of MEA Local Elections, in Appendix E.
  - **MEA RA Delegate results** must be reported to the MEA Membership Department using the RA Delegate Election Form, Official Report of MEA Representative Assembly Delegates, in Appendix F.
  - **MEA RA Alternate results** must be reported to the MEA Membership Department using the RA Alternate Election Form, Official Report of MEA Representative Assembly Alternates, in Appendix G.
  - **NEA RA Delegate results** must be reported to the MEA Executive Office **by April 10** using the form that is referenced in NEA's January/February email to each local president. An example of the form each local receives, NEA Affiliated Association Official Report of Elected Delegates to the Annual Representative Assembly of the NEA, (Appendix H) can be accessed using this link:  
<http://www.nea.org/delegaterequirements>.
- \_\_\_ O. Keep all ballots (including used, unused and challenged ballots), the outside envelopes, the tally sheets and related election documents for at least one year in the custody of the president.

**IX. ELECTION CHECKLIST - OPTION #2**  
**ON-SITE ELECTION CONDUCTED AT A CENTRAL LOCATION(S)**

This checklist and sample election procedure is for an election that will be conducted at a general membership meeting or a single location. The same concept would apply if the election is conducted at several central locations. The example also assumes that MEA or NEA RA delegates and/or alternates will be elected, which necessitates adherence to the various federal requirements in conducting the election. If not electing an MEA or NEA RA delegate and/or alternate, the notification by U.S. mail may be eliminated.

**SAMPLE TIMELINE – CENTRAL LOCATION(S)**

Develop a comprehensive timeline to include your specific dates:

November 1	Appoint election committee and nomination committee
December 15	Construct an election timeline
	Review timeline with president
January 2	Mail (U.S. mail) to home address of each bargaining unit member:
	- Date(s) and time(s) of election
	- List of positions to be elected
	- Nomination information
	- Absentee ballot provisions
	- Timeline about voter eligibility
February 1	Close of nominations
February 7	Candidates submit biographical information
February 7	Briefing meeting with candidates
March 1	Voter eligibility cut off (must be a member in good standing by this date)
March 1	Announce candidates and election details in local newsletter
March 7	Ballots, biographical information and all election materials printed
March 14	Organize all election materials
March 15	Distribute biographical statements to eligible voters
March 30	Deadline for return of absentee ballots
April 1	Election conducted at general membership meeting
April 1	Count ballots
April 1	Deadline for election of NEA RA delegates
April 6	Report election results
April 7	Send election result forms within 30 days of the election as indicated in Counting and Tallying the Ballots, paragraph G, page 25.
April 10	NEA's Annual Representative Assembly of the NEA delegate and/or successors form due to MEA Executive Office
June 1	Deadline for locals to hold MEA RA delegate election, except for special elections, which may be held at any time

**NOMINATIONS – CENTRAL LOCATION(S)**

- ☐ A. The election committee should be responsible for the nominations process.
- ☐ B. Typical methods of nomination include:

- ☐ 1. At a membership meeting. It is permissible to take nominations at the general membership meeting and then conduct the secret ballot vote at that meeting as long as such notification is provided to all members in advance and as long as the nomination procedure provides for nomination prior to the meeting.
  - ☐ 2. By petition. (There is no need to require a specific nomination form. Be cautious about requiring too many signatures or instituting other requirements.)
  - ☐ 3. By written notification.
  - ☐ 4. Combination of the above.
- ☐ C. Notification of nomination needs to be made reasonably available to all bargaining unit members. Typical methods of notification include:
- ☐ 1. Posting of notice on bulletin board in all worksites.
  - ☐ 2. Placement in local newsletter.
  - ☐ 3. Announcement at meeting(s). (If this is the only option used, the meeting announcement would need to be distributed to all bargaining unit members, along with a statement that nomination information would be disseminated at the meeting. This option should be used in conjunction with one of the other methods.)
  - ☐ 4. Mailing to each bargaining unit member at home. (Since notice of the election needs to be sent to the home address of each member through the U.S. mail if electing MEA or NEA RA delegates, the notification of nominations could be included with this mailing.)
  - ☐ 5. Email of nomination notice to all bargaining unit members.
  - ☐ 6. Combination of the above.
- ☐ D. The nomination information provided to bargaining unit members must include:
- ☐ 1. Positions to be elected.
  - ☐ 2. Specific method of nominating and being nominated.
  - ☐ 3. Date, time and place for submitting nominations.
  - ☐ 4. A statement that the nominator and nominee must be members in good standing.
- ☐ E. A member in good standing nominated for a position should not be considered an official candidate until he/she has accepted the nomination. It is recommended that this acceptance or rejection should be in writing.



- \_\_\_ F. It is critical that no nominations be accepted after the nomination deadline has passed, otherwise, an opposing candidate who was timely nominated would have a valid objection to the election.
- \_\_\_ G. Once the nomination information has been provided to the bargaining unit members, the nomination committee can begin soliciting candidates.
- \_\_\_ H. In this example, the nomination information is sent along with the notice of election by U.S. mail to all bargaining unit members. See Appendix A for sample letter.

### **ELECTION PROCEDURE – CENTRAL LOCATION(S)**

- \_\_\_ A. Construct an election timeline. This should be as detailed as possible (more detailed than the sample). At the same time, it is helpful to decide who will do what and when.
- \_\_\_ B. Review the timeline with the president. This is not required, but it may prove helpful to have the president or someone else officially review your election plans.
- \_\_\_ C. Through the U.S. mail, send to the last known home address of each MEA/NEA bargaining unit member the following information (see Appendix A for sample letter). If there are enough members, a bulk rate mailing permit from the post office may save postage costs.
  - \_\_\_ 1. List of positions to be filled by election.
  - \_\_\_ 2. Date, time and location of the election.
  - \_\_\_ 3. Nomination information:
    - \_\_\_ a. Explanation of how to be nominated.
    - \_\_\_ b. Date, time and place to submit nominations.
    - \_\_\_ c. A statement that the nominator and nominee must be members in good standing.
  - \_\_\_ 4. Due date for receipt of biographical information.
  - \_\_\_ 5. Explanation of absentee ballot procedure.
- \_\_\_ D. In addition, it may be helpful to provide this information in a local newsletter or post a notice on bulletin boards. These cannot replace the required election notification through the U.S. mail.
- \_\_\_ E. Prepare a list of election officials who will be responsible for conducting the election at the general membership meeting as well as the election times. All eligible voters must have a reasonable opportunity to vote. In the case of conducting the election in conjunction with a general membership meeting, it is advisable to begin the voting prior to the meeting and to allow voting during the meeting.

- \_\_\_ F. It is usually helpful to meet with the candidates and review the election procedures and to answer questions.
- \_\_\_ G. Obtain the voter eligibility list which, at a minimum, must include the names and home addresses of those who were members in good standing as of the eligibility cut-off date. Any members on leave or layoff are not eligible unless they have continued their membership and are in good standing as of the eligibility cut-off date and the date of the election. It is most helpful if this list is in alphabetical order and includes the assigned worksite of each member.
- \_\_\_ H. Once the list is prepared, it may be a good idea to inform the candidates that they have a right to review (not copy) the list. Also, an opportunity to review the list prior to the election may help prevent complaints after the election.
- \_\_\_ I. Though an earlier election announcement was mailed to all bargaining unit members, it is recommended that another notice of election be provided to all eligible voters a couple of weeks prior to the election. There is no need to send this one through the U.S. mail and may be in the local newsletter or by email. Include:
  - \_\_\_ 1. Candidates for each position.
  - \_\_\_ 2. Date, time and location of election.
  - \_\_\_ 3. A statement that to be eligible to vote, you must be a member in good standing as of the eligibility date and on the date of the election.
- \_\_\_ J. Prepare all election material in advance:
  - \_\_\_ 1. Instructions for election officials.
  - \_\_\_ 2. Ballots.
  - \_\_\_ 3. Biographical information.
  - \_\_\_ 4. Tally sheet for counting ballots.
- \_\_\_ K. Distribute biographical information several days prior to the date of the election. This may be accomplished through a local newsletter or by having building representatives distribute this information.
- \_\_\_ L. Train election officials and provide them with all needed election materials (ballots, tally sheets, voter eligibility list, etc.)
- \_\_\_ M. The process for voting is as follows:
  - \_\_\_ 1. The polls will open on time and will close on time. Voters standing in line as the polls close will be allowed to vote. A voter joining the line after the scheduled closing will not be allowed to vote.
  - \_\_\_ 2. Each voter shall have his/her name checked off the eligibility list and will then be handed a ballot.

- \_\_\_ 3. The voter will then mark the ballot and place it in the locked ballot box.
- \_\_\_ 4. A voter whose name is not on the eligibility list, but who insists he/she is an eligible voter shall be provided a ballot and a blank envelope. The outside of the envelope will be marked by the election official with the person's name, the statement "CHALLENGED BALLOT" and the reason for the challenge. The person will mark the ballot, seal it in the envelope, and place the envelope in the ballot box. All such challenges will be resolved prior to counting the ballots.
- \_\_\_ N. At the close of the election, the ballots will be counted.

## COUNTING AND TALLYING THE BALLOTS – CENTRAL LOCATION(S)

- \_\_\_ A. The counting should be done openly and any member in good standing is allowed to observe the counting process. At least two members of the local election committee should conduct the counting and tallying process. Observers may not interfere with the process.
- \_\_\_ B. If any absentee ballots have been received, check the names against the eligibility list. If eligible, open the envelope and place the ballot in the ballot box. If the absentee ballot is ineligible, set it aside as a challenged ballot. **CHALLENGED BALLOTS ARE NOT TO BE COUNTED AND ARE NOT TO BE OPENED.**
- \_\_\_ C. Unlock and empty the ballot box.
- \_\_\_ D. Count the ballots by using the tabulation sheet that the Election Committee prepared in advance.
- \_\_\_ E. When counting ballots, if a mark is outside the box, if there is an erasure, or if the ballot contains some other discrepancy, the local elections committee must make a judgment as to how or whether to count it. The ballot should be counted if the intent of the voter is apparent and not counted if the intent is unclear.
  - \_\_\_ 1. If a voter makes a mistake in voting for too many candidates for a given office, only the vote(s) for that office should be voided.
  - \_\_\_ 2. If the number of unresolved ballots at the end of the tally could affect the outcome of any race, they must be resolved and, if determined to be valid, must be counted.
- \_\_\_ F. Announce the results to the membership.
- \_\_\_ G. Forward the election result forms within 30 days of the election as follows:
  - **Local Officer results** must be reported to the UniServ office that services the local using the Officer Report Form, Official Report of MEA Local Elections, in Appendix E.
  - **MEA RA Delegate results** must be reported to the MEA Membership Department using the RA Delegate Election Form, Official Report of MEA Representative Assembly Delegates, in Appendix F.
  - **MEA RA Alternate results** must be reported to the MEA Membership Department using the RA Alternate Election Form, Official Report of MEA Representative Assembly Alternates, in Appendix G.
  - **NEA RA Delegate results** must be reported to the MEA Executive Office by April 10 using the form that is referenced in NEA's January/February email to each local president. An example of the form each local receives, NEA Affiliated Association Official Report of Elected Delegates to the Annual Representative Assembly of the NEA, (Appendix H) can be accessed using this link:  
<http://www.nea.org/delegaterequirements>.
- \_\_\_ H. Keep all ballots (including used, unused and challenged ballots), the outside envelopes, the tally sheets and related election documents for at least one year in the custody of the president.

## **X. ELECTION CHECKLIST - OPTION #3 MAIL BALLOT ELECTION**

This checklist and sample election procedure is for an election that will be conducted by U.S. mail. The example also assumes that MEA or NEA RA delegates and/or alternates will be elected, which necessitates adherence to the various federal requirements in conducting the election.

### **SAMPLE TIMELINE - MAIL BALLOT**

Develop a comprehensive timeline to include your specific dates:

November 1	Appoint election committee and nomination committee
December 15	Construct an election timeline
	Review timeline with president
January 2	Mail (U.S. mail) to home address of each bargaining unit member: <ul style="list-style-type: none"><li>- Date ballots will be mailed and return date</li><li>- List of positions to be elected</li><li>- Nomination information</li><li>- Timeline about voter eligibility</li></ul>
February 1	Close of nominations
February 7	Candidates submit biographical information
February 7	Briefing meeting with candidates
February 7	Voter eligibility cut off (must be a member in good standing by this date)
February 25	Ballots, envelopes, biographical information, and all election materials printed, and two (2) sets of address labels prepared
March 1	Voter eligibility cut off (must be a member in good standing by this date)
March 7	Mail ballots to eligible voters
April 1	All returned ballots must be postmarked by this date
April 1	Deadline for election of NEA RA delegates
April 5	Count ballots
April 8	Report election results
April 10	Send election result forms within 30 days of the election as indicated in Counting and Tallying the ballots, paragraph K, page 31.
April 10	NEA's Annual Representative Assembly of the NEA delegate and/or successors form due to MEA Executive Office
June 1	Deadline for locals to hold MEA RA delegate election, except for special elections, which may be held at any time

### **NOMINATIONS - MAIL BALLOT**

- \_\_\_ A. The election committee should be responsible for the nomination process.
- \_\_\_ B. Typical methods of nomination include:
- \_\_\_ 1. At a membership meeting.
  - \_\_\_ 2. By petition. (There is no need to require a specific nomination form. Be cautious about requiring too many signatures or instituting other requirements.)

- \_\_\_ 3. By written notification.
- \_\_\_ 4. Combination of the above.
- \_\_\_ C. Notification of nomination needs to be made reasonably available to all bargaining unit members. Typical methods of notification include:
  - \_\_\_ 1. Posting of notice on bulletin board in all worksites.
  - \_\_\_ 2. Placement in local newsletter.
  - \_\_\_ 3. Announcement at meeting(s). (If this is the only option used, the meeting announcement would need to be distributed to all bargaining unit members, along with a statement that nomination information would be disseminated at the meeting. This option should be used in conjunction with one of the other methods.)
  - \_\_\_ 4. Mailing to each bargaining unit member at home.
  - \_\_\_ 5. Email of nomination notice to all bargaining unit members.
  - \_\_\_ 6. Combination of the above.
- \_\_\_ D. The nomination information provided to bargaining unit members must include:
  - \_\_\_ 1. Positions to be elected.
  - \_\_\_ 2. Specific method of nominating and being nominated.
  - \_\_\_ 3. Date, time and place for submitting nominations.
  - \_\_\_ 4. A statement that the nominator and nominee must be members in good standing.
- \_\_\_ E. A member in good standing nominated for a position should not be considered an official candidate until he/she has accepted the nomination. It is recommended that this acceptance or rejection should be in writing.
- \_\_\_ F. It is critical that no nominations be accepted after the nomination deadline has passed; otherwise, an opposing candidate who was timely nominated would have a valid objection to the election.
- \_\_\_ G. Once the nomination information has been provided to the bargaining unit members, the nomination committee can begin soliciting candidates.
- \_\_\_ H. In this example, the nomination information is sent along with the notice of election through the local newsletter to all bargaining unit members in good standing. See Appendix A for a sample letter.

## ELECTION PROCEDURE - MAIL BALLOT

- \_\_\_ A. Construct an election timeline. This should be as detailed as possible (more detailed than the sample). At the same time, it is helpful to decide who will do what and when.
- \_\_\_ B. Review the timeline with president. This is not required, but it may prove helpful to have the president or someone else officially review your election plans.
- \_\_\_ C. Through the local newsletter send to all MEA/NEA bargaining unit members the following information (see Appendix A for sample letter that will need to be modified slightly for a mail ballot election):
  - \_\_\_ 1. List of positions to be filled by election.
  - \_\_\_ 2. Date ballots will be mailed and date of return.
  - \_\_\_ 3. Nomination information:
    - \_\_\_ a. Explanation of how to be nominated.
    - \_\_\_ b. Date, time and place to submit nominations.
  - \_\_\_ 4. Due date for receipt of biographical information.
- \_\_\_ D. In addition, it may be helpful to post the above information on bulletin boards at each work location. These cannot replace the required election notification through the U.S. mail.
- \_\_\_ E. It is usually helpful to meet with the candidates and review the election procedures and to answer questions.
- \_\_\_ F. Obtain the voter eligibility list which, at a minimum, must include the names and home addresses of those who were members in good standing as of the eligibility cut-off date. Any members on leave or layoff are not eligible unless they have continued their membership and are in good standing as of the eligibility cut-off date and the date of the election. It is most helpful if this list is in alphabetical order and includes the assigned worksite of each member.
- \_\_\_ G. Once the voter eligibility list is obtained, it may be a good idea to inform the candidates that they have a right to review (not copy) the list. An opportunity to review the list prior to the election may help prevent complaints after the election.
- \_\_\_ H. Mail the election material to each eligible voter at his/her last known home address. This mailing should include:
  - \_\_\_ 1. Ballot;
  - \_\_\_ 2. Secret ballot envelope;
  - \_\_\_ 3. Return envelope;

- \_\_\_ 4. Biographical information; and
- \_\_\_ 5. Instructions.
- \_\_\_ I. Details of the mailing:
  - \_\_\_ 1. Instructions:
    - \_\_\_ a. Mark the ballot.
    - \_\_\_ b. Seal the ballot inside the "Secret Ballot" envelope.
    - \_\_\_ c. Seal the "Secret Ballot" envelope inside the return envelope.
    - \_\_\_ d. Sign the back of the return envelope. Do not remove the return address label from the front of the envelope. You must return your ballot in the envelopes provided, or your ballot will not be counted.
    - \_\_\_ e. The return envelope must be returned by U.S. mail and postmarked no later than \_\_\_\_\_.
  - \_\_\_ 2. The usual size of the "secret ballot" envelope is 3-7/8" x 8-7/8" (No. 9) and the words "SECRET BALLOT" are printed in large letters on the front of the envelope.
  - \_\_\_ 3. The usual size of the return envelope is 4-1/8" x 9-3/8" (No. 10). The front of the envelope is pre-addressed back to the local association. The back of the envelope has a signature line and statement:

This is to certify that I marked the enclosed ballot.

\_\_\_\_\_  
(Signature)
  - \_\_\_ Further, it is advisable to place the eligible voter's address label in the upper left corner of the front of the envelope. This will greatly aid in checking the return envelopes against the eligibility list since it is difficult to read many signatures.
  - \_\_\_ It is a local decision as to whether or not to place a stamp on the return envelope. However, most local associations do provide the postage as they want to encourage members to vote.
- \_\_\_ J. It is a good idea to rent a post office box for the return of the ballots and place that P.O. Box address on the return envelope. This will allow all of the ballots to be obtained from the post office at one time and will eliminate any potential charges that ballots were lost as they were delivered daily.
- \_\_\_ K. If the returned ballots are not to be counted immediately upon picking them up from the post office, it is a requirement that they be placed in a locked and secure ballot box until they are counted.



## **COUNTING AND TALLYING THE BALLOTS - MAIL BALLOT**

- \_\_\_ A. The counting should be done openly and any member in good standing is allowed to observe the counting process. At least two members of the local election committee should conduct the counting and tallying process. Observers may not interfere with the process.
- \_\_\_ B. Review the voter eligibility list and cross off all names of individuals who were not Association members in good standing as of the time the ballots were cast, even though they may have been members in good standing as of the original eligibility date. To be an eligible voter, an individual must have been a member in good standing as of the initial eligibility date and be a member in good standing at the time of the election.
- \_\_\_ C. Alphabetize the returned envelopes by last name.
- \_\_\_ D. Check the signature on the outside envelopes against the list of eligible voters.
  - \_\_\_ 1. If the name on the outside of the envelope matches a name on the eligible voter list, place a check by that name on the list and place all such envelopes together.
  - \_\_\_ 2. Any ballot that is challenged shall be set aside and the reason for the challenge shall be written on the envelope.
  - \_\_\_ 3. If the signature on the outside envelope is illegible or the name does not appear on the voter eligibility list, set all such envelopes aside as challenged ballots. THESE BALLOTS ARE NOT TO BE COUNTED AND ARE NOT TO BE OPENED.
  - \_\_\_ 4. If the signature check reveals two or more envelopes from the same individual, set ALL the envelopes from that individual aside as challenged ballots. THESE BALLOTS ARE NOT TO BE COUNTED AND ARE NOT TO BE OPENED.
- \_\_\_ E. Only when all envelopes have been checked against the eligibility list may the count continue. At this time, open the outside envelopes of the VALID ballots, placing the outside envelopes in one pile and the UNOPENED secret ballot envelopes in a separate pile.
- \_\_\_ F. Only when all outside envelopes have been separated from the secret ballot envelopes may the count continue. At this time, set the outside envelopes aside (DO NOT THROW THEM AWAY).
- \_\_\_ G. Open the secret ballot envelopes, placing the ballots in one pile and the secret ballot envelopes in a separate pile. The empty secret ballot envelopes may be thrown away at the end of the count.
- \_\_\_ H. Count the ballots by using the tabulation sheet that the election committee prepared in advance.

- \_\_\_ I. When counting ballots, if a mark is outside the box, if there is an erasure, or if the ballot contains some other discrepancy, the local elections committee must make a judgment as to how or whether to count it. The ballot should be counted if the intent of the voter is apparent and not counted if the intent is unclear.
  - \_\_\_ 1. If a voter makes a mistake in voting for too many candidates for a given office, only the vote(s) for that office should be voided.
  - \_\_\_ 2. If the number of unresolved challenged ballots at the end of the tally could affect the outcome of any race, they must be resolved and, if determined to be valid, must be counted.
- \_\_\_ J. Announce the results to the membership.
- \_\_\_ K. Forward the election result forms as follows:
  - **Local Officer results** must be reported to the UniServ office that services the local using the Officer Report Form, Official Report of MEA Local Elections, in Appendix E.
  - **MEA RA Delegate results** must be reported to the MEA Membership Department using the RA Delegate Election Form, Official Report of MEA Representative Assembly Delegates, in Appendix F.
  - **MEA RA Alternate results** must be reported to the MEA Membership Department using the RA Alternate Election Form, Official Report of MEA Representative Assembly Alternates, in Appendix G.
  - **NEA RA Delegate results** must be reported to the MEA Executive Office by April 10 using the form that is referenced in NEA's January/February email to each local president. An example of the form each local receives, NEA Affiliated Association Official Report of Elected Delegates to the Annual Representative Assembly of the NEA, (Appendix H) can be accessed using this link:  
<http://www.nea.org/delegaterequirements>.
- \_\_\_ I. Keep all ballots (including used, unused and challenged ballots), the outside envelopes, the tally sheets and related election documents for at least one year in the custody of the president.

## **XI. ELECTION CHECKLIST - OPTION #4 ONLINE ELECTION**

This checklist and sample election procedure is for an election that will be conducted online.

### **SAMPLE TIMELINE - ONLINE**

30 days prior to election

The local informs the MEA Vice President of its intention to hold an online election by completing an online request form at <http://www.mymea.org/onlinevotingrequest>

25 days prior to election

MEA Vice President approves or denies the requested election and notifies MEA IT and IT contacts local

Notify all bargaining unit members of online election through U.S. mail at least 15 days prior to the election

- Date(s), time(s) and website address for of election
- List of positions to be elected
- Nomination information
- Absentee ballot provisions
- A statement that to be eligible to vote, you must be a member in good standing as of the eligibility date and as of the date of the election

20 days prior to election

MEA IT provides a voter eligibility list from the MEA Membership system to all election committee members

15 days prior to election

Provide MEA IT with ballot items and names of candidates in the form of a Word document

10 days prior to election

MEA IT and the local association finalize the ballot

Election held

Before counting any paper ballots, provide MEA IT with a list of paper ballot voters to ensure paper ballot voters did not vote online. Once voters are authenticated proceed to count ballots and transmit those paper ballot results to MEA IT. Paper ballots should use the double envelope system to ensure voting by secret ballot.

One (1) day after online election

MEA IT provides all members of local elections committee with the elections results and a list of members who voted

April 1

Deadline for election of NEA RA delegates

April 7

Send election result forms within 30 days of election as indicated in Counting and Tallying the Ballots, paragraph N, page 37.

- April 10            Deadline for transmittal of NEA's Annual Representative Assembly of the NEA delegate and/or successors form to MEA Executive Office
- June 1             Deadline for locals to hold MEA RA delegate election, except for special elections, which may be held at any time

### **NOMINATIONS - ONLINE**

- \_\_\_ A. The election committee should be responsible for the nominations process.
- \_\_\_ B. Typical methods of nomination include:
- \_\_\_ 1. At a membership meeting.
  - \_\_\_ 2. By petition. (There is no need to require a specific nomination form. be cautious about requiring too many signatures or instituting other requirements.)
  - \_\_\_ 3. By written notification.
  - \_\_\_ 4. Combination of the above.
- \_\_\_ C. Notification of nomination needs to be made reasonably available to all bargaining unit members. typical methods of notification include:
- \_\_\_ 1. Posting of notice on bulletin board in all worksites.
  - \_\_\_ 2. Placement in local newsletter.
  - \_\_\_ 3. Announcement at meeting(s). (If this is the only option used, the meeting announcement would need to be distributed to all bargaining unit members, along with a statement that nomination information would be disseminated at the meeting. This option should be used in conjunction with one of the other methods.)
  - \_\_\_ 4. Mailing to each bargaining unit member at home. (Since notice of the election needs to be sent to the home address of each member through the U.S. mail if electing MEA or NEA RA delegates, the notification of nominations could be included with this mailing.)
  - \_\_\_ 5. Email
  - \_\_\_ 6. Combination of the above.
- \_\_\_ D. The nomination information provided to bargaining unit members must include:
- \_\_\_ 1. Positions to be elected.
  - \_\_\_ 2. Specific method of nominating and being nominated.

- \_\_\_ 3. Date, time and place for submitting nominations.
- \_\_\_ 4. A statement that the nominator and nominee must be members in good standing.
- \_\_\_ E. A member in good standing nominated for a position should not be considered an official candidate until he/she has accepted the nomination. It is recommended that this acceptance or rejection be in writing.
- \_\_\_ F. It is critical that no nominations be accepted after the nomination deadline has passed. Otherwise, an opposing candidate who was timely nominated would have a valid objection to the election.
- \_\_\_ G. Once the nomination information has been provided to the bargaining unit members, the nomination committee can begin soliciting candidates.
- \_\_\_ H. In this example, the nomination information is sent along with the notice of election by U.S. mail to all bargaining unit members. See Appendix A for sample letter.

### **ELECTION PROCEDURE – ONLINE**

- \_\_\_ A. **30 calendar days prior to the date of the election** local informs the MEA Vice President of its intention to hold an online election by completing an online request form at <http://www.mymea.org/onlinevotingrequest>, which includes the following information:
  - beginning and ending dates of election
  - local elections chair w/contact information (including email address)
  - complete list of local elections committee (including email addresses)
  - electronic submission of constitution and bylaws

The MEA Vice President reviews the constitution and bylaws and notifies MEA IT if the election is approved. MEA IT manages the remainder of the election process, and all communications come from MEA IT from that point forward.

- \_\_\_ B. **25 calendar days prior to the date of the election** MEA approves or denies the requested election.
- \_\_\_ C. Notify all bargaining unit members of the following information through U.S. mail at least 15 days prior to the election (see Appendix A for sample letter).
  - \_\_\_ 1. List of positions to be filled by election.
  - \_\_\_ 2. Date(s), time(s) and website address for election and note during the election MEA IT provides email and phone support Monday through Friday from 8 a.m.-4 p.m. please call 800-292-1934, ext. 5440 or send an email to [meait@mea.org](mailto:meait@mea.org).
  - \_\_\_ 3. A statement that to be eligible to vote, you must be a member in good standing as of the eligibility date and on the date of the election.

- \_\_\_ 4. Nomination information:
  - \_\_\_ A. Explanation of how to be nominated.
  - \_\_\_ B. Date, time and place to submit nominations.
  - \_\_\_ C. A statement that the nominator and nominee must be members in good standing.
- \_\_\_ 5. Due date for receipt of biographical information.
- \_\_\_ 6. Explanation of paper ballot procedure.
- \_\_\_ E. **15 calendar days of the election**, local provides MEA IT with ballot items and names of candidates in the form of a Word document.
- \_\_\_ F. **10 calendar days prior to the election**, local and MEA IT finalize the ballot.
- \_\_\_ G. Prepare any needed paper ballots in advance:
  - \_\_\_ 1. Instructions for election officials.
  - \_\_\_ 2. Ballots items, names of candidates and biographical information.
  - \_\_\_ 3. Secret ballot envelope for any paper ballots.
  - \_\_\_ 4. Outside envelope for any paper ballots.
  - \_\_\_ 5. Tally sheet for counting any paper ballots.
- \_\_\_ H. **Within 10 calendar days of the election**, MEA IT and the local association finalize the ballot.
- \_\_\_ I. During the election MEA IT provides email and phone support Monday through Friday From 8 a.m.-4 p.m. Please call 800-292-1934, ext. 5440 or send an email to [meait@mea.org](mailto:meait@mea.org).

## COUNTING AND TALLYING THE BALLOTS - ONLINE

- \_\_\_ A. Before counting any paper ballots, the name(s) on the outside of the ballot envelopes must be provided to MEA IT to ensure the member(s) did not also vote online.
- \_\_\_ B. Once MEA IT notifies the local that the member(s) did not vote online, the counting of any paper ballots should be done openly and any member in good standing is allowed to observe the counting process. At least two members of the local election committee should conduct the counting and tallying process.
- \_\_\_ C. Review the voter eligibility list and cross off all names of individuals who were not Association members in good standing as of the time the ballots were cast, even though they may have been members in good standing as of the original eligibility date. To be an eligible voter, an individual must have been a member in good standing as of the initial eligibility date and be a member in good standing at the time of the election.
- \_\_\_ D. Alphabetize the returned envelopes by last name.
- \_\_\_ E. Check the signature on the outside envelopes against the list of eligible voters.
  - \_\_\_ 1. If the name on the outside of the envelope matches a name on the eligible voter list, place a check by that name on the list and place all such envelopes together.
  - \_\_\_ 2. Any ballot that is challenged shall be set aside and the reason for the challenge shall be written on the envelope.
  - \_\_\_ 3. If the signature on the outside envelope is illegible or the name does not appear on the voter eligibility list, set all such envelopes aside as challenged ballots. THESE BALLOTS ARE NOT TO BE COUNTED AND ARE NOT TO BE OPENED.
  - \_\_\_ 4. If the signature check reveals two or more envelopes from the same individual, set ALL the envelopes from that individual aside as challenged ballots. THESE BALLOTS ARE NOT TO BE COUNTED AND ARE NOT TO BE OPENED.
- \_\_\_ F. Only when all envelopes have been checked against the eligibility list may the count continue. At this time, open the outside envelopes of the VALID ballots, placing the outside envelopes in one pile and the UNOPENED secret ballot envelopes in a separate pile.
- \_\_\_ G. Only when all outside envelopes have been separated from the secret ballot envelopes may the count continue. At this time, set the outside envelopes aside (DO NOT THROW THEM AWAY).
- \_\_\_ H. Open the secret ballot envelopes, placing the ballots in one pile and the secret ballot envelopes in a separate pile. The empty secret ballot envelopes may be thrown away at the end of the count.

- \_\_\_ I. Count the ballots by using the tabulation sheet that the election committee prepared in advance.
- \_\_\_ J. When counting ballots, if a mark is outside the box, if there is an erasure, or if the ballot contains some other discrepancy, the local elections committee must make a judgment as to how or whether to count it. The ballot should be counted if the intent of the voter is apparent and not counted if the intent is unclear.
- \_\_\_ K. Forward results of the paper ballot count to MEA IT.
- \_\_\_ L. MEA IT adds paper ballot counts to online election count and provides the local with the total results within one (1) business day and provides a list of members who voted to all election committee members.
- \_\_\_ M. Announce the results to the membership.
- \_\_\_ N. Forward the election result forms within 30 days of the election as follows:
  - **Local Officer results** must be reported to the UniServ office that services the local using the Officer Report Form, Official Report of MEA Local Elections, in Appendix E.
  - **MEA RA Delegate results** must be reported to the MEA Membership Department using the RA Delegate Election Form, Official Report of MEA Representative Assembly Delegates, in Appendix F.
  - **MEA RA Alternate results** must be reported to the MEA Membership Department using the RA Alternate Election Form, Official Report of MEA Representative Assembly Alternates, in Appendix G.
  - **NEA RA Delegate results** must be reported to the MEA Executive Office **by April 10** using the form that is referenced in NEA's January/February email to each local president. An example of the form each local receives, NEA Affiliated Association Official Report of Elected Delegates to the Annual Representative Assembly of the NEA, (Appendix H) can be accessed using this link:  
<http://www.nea.org/delegaterequirements>.
- \_\_\_ O. Keep any paper ballots, outside envelopes, tally sheets, and related election documents provided by MEA IT for at least one year in the custody of the president.



## **XII. ELECTION CHALLENGES**

- A. The local governance documents should provide a procedure to handle election challenges.
- B. The procedure might include some of the following:
  - 1. A challenge must be filed with the local president in writing within fourteen (14) calendar days following the announcement of election results.
  - 2. The challenge must clearly state the alleged election improprieties.
  - 3. Upon receipt of a timely filed challenge, the president will direct the election committee to meet with the challenger and any other affected candidate, review the challenge and render a decision within fifteen (15) days of the president's receipt of the challenge.
  - 4. The decision of the election committee may be appealed by any aggrieved candidate by filing a written appeal with the local president within ten (10) days of receipt of the election committee decision.
  - 5. The president will convene a meeting of the local governing board which shall meet with the aggrieved candidate and any other affected candidate, review the challenge and render a decision within fifteen (15) days of the president's receipt of the appeal.
  - 6. Neither the election committee nor the local governing board shall direct a rerun election unless there is sufficient evidence to believe that any improprieties could reasonably have affected the outcome of the election.
  - 7. Only a member in good standing can challenge elections results.

## SAMPLE LETTER ANNOUNCING ELECTION

[Date]

Dear Association Member:

The annual Association election will be conducted:

DATE: [month, dates, year]  
 TIME: 3:00 p.m. to 5:00 p.m. each day  
 SITES: All elementary, middle school and high school buildings

This election will be by secret ballot.

The following positions are open for nomination:

President \_\_\_\_\_-Year Term [indicate whether One-, Two- or Three-year term]  
 Vice President \_\_\_\_\_-Year Term [indicate whether One-, Two- or Three-year term]  
 Treasurer \_\_\_\_\_-Year Term [indicate whether One-, Two- or Three-year term]  
 Secretary \_\_\_\_\_-Year Term [indicate whether One-, Two- or Three-year term]  
 MEA RA Delegate Two- or Three-Year Term (two (2) positions)  
 MEA RA Alternate Two- or Three- Year Term (two (2) positions)  
 Board of Directors, Representing Minority Persons 3-1(g) \_\_\_\_\_-Year Term [indicate whether One-, Two- or Three-year term]  
 Board of Directors At-Large \_\_\_\_\_-Year Term [indicate whether One-, Two- or Three-year term]  
 NEA RA Delegate One-, Two- or Three-Year Term (\_\_\_\_ positions)  
 NEA RA Successor/alternate One-, Two- Or Three-Year Term (\_\_\_\_ Positions)

You may nominate yourself or another member in good standing by placing the name and position nominated for in writing and mailing to [Name], Election Chairperson, [mailing address], [city, state and zip]. Nominations must be received no later than March 1, [year]. Open nominations will also be conducted at the general membership meeting held on February 15, [year], 3:30 p.m., in the high school auditorium. All nominators and nominees must be members in good standing.

This is an on-site election. However, if it is impossible for you to vote on site during either day of the election, you may request an absentee ballot. To do so, send your request specifically stating your reason for not being able to vote on site, to [Name] at the address above no later than [insert date]. You will receive an absentee ballot that must be returned no later than [insert date].

As provided in the local election guidelines [or constitution or bylaws], any member who is in good standing at least 30 days before the election will be eligible to vote as long as the member is also in good standing on the date of the election.

I personally encourage you to run for office or to nominate another member. Only through our volunteer efforts, each taking a turn, will we be able to continue building a strong, active and successful local association. We've come a long way, but we've a long way to go and we need everyone to pitch in and help.

Sincerely yours,

[Name]  
 President

**SAMPLE INSTRUCTION LETTER - MAIL BALLOT**

[Date]

Dear Association Member:

This election is being conducted by mail ballot. Your ballot must be returned by U.S. mail and postmarked no later than month/date/year. This letter and enclosed ballot constitute your official notice of the election.

You should find enclosed with this letter: An official ballot, a secret ballot envelope and a return address envelope requiring no postage.

In voting in this election, please follow these instructions:

1. Mark an "X" or place a "check mark" on the line beside the name(s) of the candidates of your choice. Do not mark the ballot in any other way.
2. Seal your marked ballot in the secret ballot envelope. Do not mark the secret ballot envelope.
3. Seal the secret ballot envelope in the return-addressed envelope. Make sure your name and address on the return-addressed envelope is correct and do not remove this label.
4. Sign your name on the line provided on the reverse side of the return-addressed envelope. If you do not sign your name, your ballot will not be counted (do not print). Do not worry; your ballot will be secret. Once the name and signature on the return-addressed envelopes have been checked against the list of eligible voters, the signed envelopes are opened and all secret ballot envelopes are placed in one pile. Once all secret ballot envelopes are in one pile, they are then opened and the ballots counted. This process protects the secrecy of your ballot.
5. Your ballot must be returned through the U.S. mail and postmarked no later than month/date/year.
6. If you spoiled your ballot and need another one, please contact me at home (phone number) or at school (phone number) and a duplicate ballot will be forwarded.

As provided in the local elections guidelines [or constitution or bylaws], any member who is in good standing at least 30 days before the postmark date will be eligible to vote as long as the member is also in good standing on the date the ballots are counted.

Remember, in order for your ballot to be counted, it must be postmarked no later than month/date/year, your return address label must be on the return envelope and the envelope must bear your signature.

Sincerely yours,

[Name]  
Election Chairperson

## SAMPLE TALLY SHEET

[NAME OF LOCAL EA/ESP]

TALLY SHEET NO. \_\_\_\_\_

PRES.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	TOTAL	
[Name]																											
[Name]																											
VOID/WRITE-IN																											
Void																											
VICE-PRES.																											
[Name]																											
[Name]																											
VOID/WRITE-IN																											
Void																											
SEC-TREAS																											
[Name]																											
[Name]																											
VOID/WRITE-IN																											
Void																											
MEA-RA																											
[Name]																											
[Name]																											
[Name]																											
[Name]																											
VOID/WRITE-IN																											
Void																											

(Separate ballots into stacks of 25 and use one tally sheet for each stack, then compile all tally sheets.) EACH SHOULD TALLY TO 25  
 (This tally sheet has proven to be a most efficient and accurate means in tabulating results—especially in large locals.)

**S A M P L E**  
**[Year] ELECTION OF EA/ESP OFFICERS**

**OFFICIAL BALLOT**

**PRESIDENT/MEA RA DELEGATE**

Two- or Three-Year Term (September 1, [year]-August 31, [year])

- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ \_\_\_\_\_  
 (Write-In Candidate)

**VICE PRESIDENT** - Two- or Three-Year Term

- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ \_\_\_\_\_  
 (Write-In Candidate)

**SECRETARY-TREASURER** - Two- or Three-Year Term

- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ \_\_\_\_\_  
 (Write-In Candidate)

**MEA RA DELEGATES** – Two- or Three-Year Term – Two positions  
 (Vote for two)

- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ \_\_\_\_\_  
 (Write-In Candidate)

**MEA RA MINORITY 3-1(g) DELEGATES** - Two- or Three-Year Term – Two positions  
 (Vote for two)

- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ \_\_\_\_\_  
 (Write-In Candidate)

**MEA RA DELEGATES** - One-, Two- or Three-Year Term – \_\_\_\_ (\_\_) positions  
 (Vote for \_\_\_\_)

- ☐ [Candidate Name]
- ☐ [Candidate Name]
- ☐ \_\_\_\_\_  
 (Write-In Candidate)

NOTE: All MEA RA delegates and alternate terms must begin September 1, unless filling a vacancy, and expire August 31.

**OFFICIAL REPORT OF MICHIGAN EDUCATION ASSOCIATION LOCAL ELECTIONS**  
(Please return to your local Uniserv Office within 30 days after elections are held)

**NAME OF LOCAL:** \_\_\_\_\_ EA\_\_\_\_ ESP\_\_\_\_ REGION#\_\_\_\_ **DATE OF ELECTION:** \_\_\_\_\_  
(Full name of local)

**PRESIDENT:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**NAME OF PAST PRESIDENT:** \_\_\_\_\_

**VICE PRESIDENT:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**SECRETARY:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**TREASURER:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**LOCAL MEMBERSHIP CHAIR:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**OFFICIAL REPORT OF MICHIGAN EDUCATION ASSOCIATION LOCAL ELECTIONS**  
(Please return to your local Uniserv Office within 30 days after elections are held)**APPENDIX E**  
(continued)**MISC. POSITIONS****PAC CHAIRPERSON:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**MEA-PAC DELEGATE:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**REGION COUNCIL DELEGATE:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**REGION COUNCIL DELEGATE:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**COORDINATING COUNCIL DELEGATE:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Term Begins: \_\_\_\_\_ (exact date required) Term Expires: \_\_\_\_\_ (exact date required)

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**OFFICIAL REPORT OF MEA REPRESENTATIVE ASSEMBLY DELEGATES****FULL NAME OF LOCAL:** \_\_\_\_\_ **EA** \_\_\_\_\_ **ESP** \_\_\_\_\_**Region #:** \_\_\_\_\_ **Date of Election:** \_\_\_\_\_**DELEGATE NAME:** \_\_\_\_\_ **Rep. of Minority 3-1(g):** Yes\_\_\_ No\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_

Home/Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**Term Begins:** September 1, \_\_\_\_\_ [year] **Term Expires:** August 31, \_\_\_\_\_ [year]

(or term effective immediately as of \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ due to vacancy)

**DELEGATE NAME:** \_\_\_\_\_ **Rep. of Minority 3-1(g):** Yes\_\_\_ No\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_

Home/Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**Term Begins:** September 1, \_\_\_\_\_ [year] **Term Expires:** August 31, \_\_\_\_\_ [year]

(or term effective immediately as of \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ due to vacancy)

**DELEGATE NAME:** \_\_\_\_\_ **Rep. of Minority 3-1(g):** Yes\_\_\_ No\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_

Home/Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**Term Begins:** September 1, \_\_\_\_\_ [year] **Term Expires:** August 31, \_\_\_\_\_ [year]

(or term effective immediately as of \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ due to vacancy)

**Signature:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Within 30 days of the election, this form must be emailed to [mea\\_ra@mea.org](mailto:mea_ra@mea.org), faxed to 517-337-5587  
or mailed to: MEA Executive Office, P.O. Box 2573, East Lansing MI 48826-2573



**OFFICIAL REPORT OF MEA REPRESENTATIVE ASSEMBLY ALTERNATES****APPENDIX G****FULL NAME OF LOCAL:** \_\_\_\_\_ **EA** \_\_\_\_\_ **ESP** \_\_\_\_\_**Region #:** \_\_\_\_\_ **Date of Election:** \_\_\_\_\_**ALTERNATE NAME:** \_\_\_\_\_ **Rep. of Minority 3-1(g):** Yes\_\_\_ No\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_

Home/Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**Term Begins:** September 1, \_\_\_\_\_ [year] **Term Expires:** August 31, \_\_\_\_\_ [year]

(or term effective immediately as of \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ due to vacancy)

**ALTERNATE NAME:** \_\_\_\_\_ **Rep. of Minority 3-1(g):** Yes\_\_\_ No\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_

Home/Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**Term Begins:** September 1, \_\_\_\_\_ [year] **Term Expires:** August 31, \_\_\_\_\_ [year]

(or term effective immediately as of \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ due to vacancy)

**ALTERNATE NAME:** \_\_\_\_\_ **Rep. of Minority 3-1(g):** Yes\_\_\_ No\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_

Home/Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**Term Begins:** September 1, \_\_\_\_\_ [year] **Term Expires:** August 31, \_\_\_\_\_ [year]

(or term effective immediately as of \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ due to vacancy)

**Signature:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Within 30 days of the election, this form must be emailed to [mea\\_ra@mea.org](mailto:mea_ra@mea.org), faxed to 517-337-5587  
or mailed to: MEA Executive Office, P.O. Box 2573, East Lansing MI 48826-2573

**For Office Use Only:** \_\_\_\_\_ Entered Alternates into netFORUM \_\_\_\_\_ Confirmed Eligibility Status

2022

**AFFILIATED ASSOCIATION OFFICIAL REPORT  
OF ELECTED DELEGATES TO THE ANNUAL REPRESENTATIVE ASSEMBLY  
OF THE NATIONAL EDUCATION ASSOCIATION**

2022

Please complete this form as soon as election results are known. A local *must* forward the delegate election report forms to the **STATE AFFILIATE** by **April 10** or a different date set by the state affiliate. The state affiliate must forward their State and Local delegate election report forms electronically to NEA, by **May 15**.

Unit #:        (4 digit local code)

State:

Local Name:

Presidents Nm:

Presidents Address:

No. of Category 1 Members \_\_\_\_\_

Number of Delegates Allowed \_\_\_\_\_

No. of Category 2 Members \_\_\_\_\_  
(Admin. And Active Life members who have retired)No. of NEA Active (incl. Active Life) members  
or Retired members a/o Jan 15  
(or Student members a/o March 15)

Total NEA Active Members \_\_\_\_\_

No. of Category 2 Delegates Allowed \_\_\_\_\_

(To be completed by Affiliate President)

(To be completed by Affiliate President)

Rank	#Votes	Last Name	First Name	Mailing Address: No. & Street	State	Zip
<input type="checkbox"/> <b>Delegate</b> <input type="checkbox"/> <b>Successor</b> Cell Phone: _____    Personal Email (Required): _____						
ID/SSN4/Alt ID:		TERM <input checked="" type="checkbox"/> 2022 <input type="checkbox"/> 2023 <input type="checkbox"/> 2024		RACE OR ETHNIC MINORITY:		<input type="checkbox"/> Green Participant
<input type="checkbox"/> ID <input type="checkbox"/> SSN4 <input type="checkbox"/> Alt ID				(Check all that apply)		
SEX:    LEVEL:		Building Rep <input type="checkbox"/> NBCT <input type="checkbox"/>		<input type="checkbox"/> Asian		<input type="checkbox"/> American Indian/Alaska Native
POSITION:				<input type="checkbox"/> Black		<input type="checkbox"/> White (not Hispanic origin)
(If '7', specify: _____)				<input type="checkbox"/> Hispanic		<input type="checkbox"/> Native Hawaiian/Pacific Islander
(See details on back of form)				<input type="checkbox"/> Other Racial or Ethnic Minority		<input type="checkbox"/> Unknown

Rank	#Vote	Last Name	First Name	Mailing Address: No. & Street	City	State	Zip
<input type="checkbox"/> <b>Delegate</b> <input type="checkbox"/> <b>Successor</b> Cell Phone: _____    Personal Email (Required): _____							
ID/SSN4/Alt ID:		TERM <input checked="" type="checkbox"/> 2022 <input type="checkbox"/> 2023 <input type="checkbox"/> 2024		RACE OR ETHNIC MINORITY:		<input type="checkbox"/> Green Participant	
<input type="checkbox"/> ID <input type="checkbox"/> SSN4 <input type="checkbox"/> Alt ID				(Check all that apply)			
SEX:    LEVEL:		Building Rep <input type="checkbox"/> NBCT <input type="checkbox"/>		<input type="checkbox"/> Asian		<input type="checkbox"/> American Indian/Alaska Native	
POSITION:				<input type="checkbox"/> Black		<input type="checkbox"/> White (not Hispanic origin)	
(If '7', specify: _____)				<input type="checkbox"/> Hispanic		<input type="checkbox"/> Native Hawaiian/Pacific Islander	
(See details on back of form)				<input type="checkbox"/> Other Racial or Ethnic Minority		<input type="checkbox"/> Unknown	

Rank	# Votes	Last Name	First Name	Mailing Address: No. & Street	City	State	Zip
<input type="checkbox"/> <b>Delegate</b> <input type="checkbox"/> <b>Successor</b> Cell Phone: _____    Personal Email (Required): _____							
ID/SSN4/Alt ID:		TERM <input checked="" type="checkbox"/> 2022 <input type="checkbox"/> 2023 <input type="checkbox"/> 2024		RACE OR ETHNIC MINORITY:		<input type="checkbox"/> Green Participant	
<input type="checkbox"/> ID <input type="checkbox"/> SSN4 <input type="checkbox"/> Alt ID				(Check all that apply)			
SEX:    LEVEL:		Building Rep <input type="checkbox"/> NBCT <input type="checkbox"/>		<input type="checkbox"/> Asian		<input type="checkbox"/> American Indian/Alaska Native	
POSITION:				<input type="checkbox"/> Black		<input type="checkbox"/> White (not Hispanic origin)	
(If '7', specify: _____)				<input type="checkbox"/> Hispanic		<input type="checkbox"/> Native Hawaiian/Pacific Islander	
(See details on back of form)				<input type="checkbox"/> Other Racial or Ethnic Minority		<input type="checkbox"/> Unknown	

Rank	# Votes	Last Name	First Name	Mailing Address: No. & Street	City	State	Zip
<input type="checkbox"/> <b>Delegate</b> <input type="checkbox"/> <b>Successor</b> Cell Phone: _____    Personal Email (Required): _____							
ID/SSN4/Alt ID:		TERM <input checked="" type="checkbox"/> 2022 <input type="checkbox"/> 2023 <input type="checkbox"/> 2024		RACE OR ETHNIC MINORITY:		<input type="checkbox"/> Green Participant	
<input type="checkbox"/> ID <input type="checkbox"/> SSN4 <input type="checkbox"/> Alt ID				(Check all that apply)			
SEX:    LEVEL:		Building Rep <input type="checkbox"/> NBCT <input type="checkbox"/>		<input type="checkbox"/> Asian		<input type="checkbox"/> American Indian/Alaska Native	
POSITION:				<input type="checkbox"/> Black		<input type="checkbox"/> White (not Hispanic origin)	
(If '7', specify: _____)				<input type="checkbox"/> Hispanic		<input type="checkbox"/> Native Hawaiian/Pacific Islander	
(See details on back of form)				<input type="checkbox"/> Other Racial or Ethnic Minority		<input type="checkbox"/> Unknown	

I certify that the above named delegate(s) were elected in compliance with the provisions of the NEA Constitution, Bylaws, Standing Rules and policy guidelines governing such elections, including the applicable requirements of the Labor Management Reporting and Disclosure Act (LMRDA).

Date \_\_\_\_\_ Signed \_\_\_\_\_  
Affiliate President

**Annual Representative Assembly of the National Education Association**

The following information is represented in the form of codes. Please select the appropriate code and write it in the space provided on the front of the form. Information with \* is required.

**SEX CODES\***

F Female  
M Male

**LEVEL CODES\***

0 Student or Retired  
1 K-12  
2 Higher Education

**POSITION CODES\***

1 Teacher  
2 Educational Support  
3 Student  
4 Administrator  
5 Retired  
6 Librarian, Counselor, Nurse  
7 Other (If this position is used, please specify in space provided.)  
8 Active Life

List the delegates in descending order by **Rank** or **# of Votes** (not required fields). List the delegates either by Rank or # of Votes and continue down the list. Both the # of Votes and Rank are alphanumeric fields.

Enter **Badge Name** as the delegate prefers to have printed on the badge. Be sure to include the **Last Name**. Limit to 30 characters if possible.

The IMS **Individual ID**, **SSN4** or **Alt ID** must be provided (*one* is required\*). Check the box for the type of number you have provided. The Individual ID can be found on the member's NEA Today magazine label, example: "MEMBER ID: 0001234567".

The **TERM\*** is the years remaining (including this RA) in the individual's elected term. Check the appropriate boxes 2022, 2023 and/or 2024. The length of the term must be on the ballot at the time of the election. The system default is 2022.

The **Building Rep** field is checked for Yes or left unchecked for No. Provides additional information about the delegate as to whether they are a **Building Representative** or not.

The **NBCT** field is checked for Yes or left unchecked for No. Provides additional information about the delegate as to whether they are a **National Board Certified Teacher** or not.

**Personal Email & Cell Phone\***

To improve delivery and availability of meeting resources for all delegates, NEA requires that each delegate and successor delegate include a **personal** email address so that the Association may provide secure access to online meeting resources. We collect the **Cell Phone** to aid in contacting delegates at the RA for various reason; emergencies, lost wallet, driver's license, etc., or relaying information regarding family members.

**Email Restrict**

Check this box to limit the use of delegate's personal email address for Association business only.

**Green Participant**

In continuing efforts toward good stewardship of Association resources at the Annual Meeting, NEA promotes the Green Delegate Initiative. Participating delegates who wish to "go green" will have the option of using online delegate resources in place of traditional print materials. To participate in this special initiative, check the "Green Participant" box and be sure to provide a Personal Email address.

**Race or Ethnic Minority**

The NEA Credentials Committee encourages you to report the ethnic group data requested for each delegate and successor delegate. However, failure to do so will in no way affect the individual's status as a delegate. In the event it is included, the information will be kept confidential and will be used to determine the proportion of ethnic minorities in your state delegation for purposes of meeting goals outlined in NEA Bylaw 3-1.g.

Local Affiliates must submit completed information to the state affiliate by **April 10** or a different date set by the state affiliate.

State Affiliates must submit state and local information to NEA by **May 15**.

Please be sure that successor delegate information is submitted at the same time as delegates. There is no limit on the number of successors who can be elected.

# Michigan Education Association

1216 KENDALE BLVD, PO BOX 2573, EAST LANSING, MI 48826-2573 517-332-6551 OR 800-292-1934 [WWW.MEA.ORG](http://WWW.MEA.ORG)

PAULA J. HERBART, PRESIDENT • CHANDRA A. MADAFFERI, VICE PRESIDENT  
BRETT R. SMITH, SECRETARY-TREASURER • MICHAEL M. SHOUDY, EXECUTIVE DIRECTOR

**The mission of the MEA is to ensure that the education of our students and  
the working environments of our members are of the highest quality.**

