

<b>ELECTION GUIDELINES</b> <b>NEA - IEA - LOCAL</b>
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*The following guidelines have been prepared to provide specific information about nomination for, campaigning for, and balloting for office or conducting others' campaigns within the IEA/NEA.*

*The Idaho Education Association/National Education Association is classified as a labor organization and is therefore subject to the provisions of the election laws of the NEA and the federal Landrum-Griffin Act.*

**STATE ELECTIONS** (See Delegate Assembly Standing Rule 11)

1. **Nominating Procedure** (See also DA Standing Rule 11.3)

a. **Nominating Committee** The president is to appoint annually a nominating committee of three members from the Board of Directors which shall ensure by each annual Delegate Assembly that there be at least one nomination for any statewide office which may have a vacancy (President, Vice-President, NEA Director from Idaho, NEA Resolutions Committee member, member of the Board of Directors elected at large, the Education Support Professional member elected at large, NEA/IEA Retired member(s), the NEA/IEA-Student member, and the members of the Board of Directors elected by the Association regions). (See appropriate nomination form attached.) (10,14, 16, 18)

b. **Notice of Nominations** Notification of state officer and board positions which are up for election will be mailed to all members following the elections timeline established by the Board of Directors. Notification will be made either through a mailed postcard or through a membership-wide, mailed publication such as the "IEA Reporter".

(1) Notification will include: instructions for nominations, the election timeline, and any other relevant information.

(2) The format of the postcard or other mailed notification shall be reviewed and approved by the Board of Directors.

c. Procedures followed for nomination and election of IEA president and vice president shall also be used and followed in nomination and election of all IEA elected officers at the state level.

d. Nomination of NEA/IEA-R members for the NEA/IEA-R position on the IEA Board of Directors shall be open to all NEA/IEA-R members. Each NEA/IEA-R member shall be notified by mail of the opportunity to place his/her name in nomination for the position. Nominees must comply with the requirement of the nominating form (see Retired Member on the Board of Directors nomination form attached). Nomination forms must be returned to the IEA President on a schedule determined by the IEA Board of Directors. (10)

e. Nomination of NEA/IEA Student members for the NEA/IEA Student position on the IEA Board of Directors shall be open to all NEA/IEA Student members. Each NEA/IEA Student member shall be notified by mail of the opportunity to place his/her name in nomination for the position. Nominees must comply with the requirement of the nominating form (see Student Member Elected Positions nomination form attached). Nomination forms must be returned to the IEA President on a schedule determined by the IEA. (10)

f. Nomination of IEA governance region members of the IEA Board of Directors shall be open to all NEA/IEA active members in that governance region. The IEA shall notify governance region leadership of a pending election for said positions. Accompanying that notification will be the nomination form (see Nomination Form for IEA Office attached) and a listing of the Roles and Responsibilities for IEA Board members compiled from the IEA Constitution and Bylaws and the Board of Directors Code of Ethics. This listing of roles and responsibilities is to ensure that all candidates are aware of their responsibilities should they be elected. Region governance leadership is to advertise the election, seek candidates to run for those positions and distribute the nomination form and roles and responsibilities list to potential candidates. It is the responsibility of the candidates to comply with the requirement of the nomination form and return the nomination form to the IEA headquarters office on the schedule adopted by the IEA Board of Directors. (14)

g. Once a completed nomination form has been received by the IEA President, the candidate will be sent a copy of the Election Guidelines provided by the IEA to ensure the candidate's compliance with all of the nominating, campaigning, and election policies, rules and regulations of the organization. (10)

2. **Campaigning** (Also see DA Standing Rule 11.3)

a. Campaign Advertising The IEA web page shall be used to announce IEA candidates for all NEA and IEA statewide elected offices and NEA RA zone positions through a link from the IEA home page to a "Meet the Candidates" page. The "Meet the Candidates" page shall be limited to the name, office for which running and the candidate nomination form. Additional information will be posted if provided by the candidate; the candidate questionnaire, candidate flyer (The information for that must be no larger than 8.5" x 11" if it were to be printed.) and a link to a personal campaign page. The deadline for the submission of materials for the "Meet the Candidates" page will be established by the IEA Board of Directors. It is the candidate's responsibility to ensure the accuracy of information and weblinks. Any submissions made after the deadline shall be posted within (10) working days of their submission at the discretion of the Executive Director. (04,14,16,17,19)

- b. Campaign Photographs and Materials A photograph of a candidate with an IEA member(s) is allowed so long as that/those member(s) have given permission for the use of their photograph. No photographs in a candidate's campaign material may include an IEA staff member, as IEA staff members are not allowed to assist in the campaign of any individual running for IEA office. Photographs that illustrate the leadership abilities of a candidate and that include the images of individuals are permitted in certain instances without permission (i.e. the candidate presiding over an association meeting; a candidate testifying before the Idaho Legislature; a candidate participating in a national, state, or local meeting). Group photographs may be used without permission if the caption makes it clear that no endorsement is being given. (17)

c. Booth Space at IEA Functions Upon request, free booth space shall be provided for every candidate for statewide office; one table per candidate in a centralized area called "candidate row." Should an issue arise concerning booth space at any IEA function, resolution shall be resolved in a manner mutually agreeable to the candidates.

d. Names of Local Unit Presidents All candidates for statewide election may receive, upon request, a complete name, phone number, and email address list of local unit presidents to permit appropriate communication for campaigning purposes.

e. Services provided by the IEA to each candidate for statewide office

(1). The following communications tools may be used in the election process; based upon the available member records:

- i. Direct mail - IEA shall establish the ability for candidates to use an outside vendor selected by IEA to provide mailing services (at the candidate's expense) to members on a state, region, and local level. Candidates are to contact the outside vendor directly. Candidates may furnish the outside vendor campaign materials in envelopes which are already stuffed, sealed, and contain proper postage
- ii. E-mail - IEA shall establish e-mail lists to be managed at IEA for candidates use. Only home email addresses will be used. Candidates are limited to one (1) campaign email per month per member per election cycle. E-mails will be sent by IEA under the username of IEA Election Information within five business days of the request. A disclaimer will be attached to each email indicating that IEA does not endorse any particular candidate. (18)
- iii. Automated call services (Robo Call)—IEA shall establish statewide and regional call lists to the extent allowable by law. Robo Calls will be sent by the IEA. Candidates are limited to two (2) automated calls per member per election cycle. These calls are at the candidate's expense and paid to the IEA in advance
- iv. Use of all communications tools with the exception of the direct mail services are to be coordinated through the Executive Director
- v. Cost of distribution may include employing current or additional staff, use of a professional mailer, or other cost items. An estimate of the cost of distribution will be calculated each year and provided to the candidate along with a copy of Exhibit K and the Election Timeline

(2) Any materials or services which are provided by the IEA shall be made available to all candidates on an equal basis. The IEA shall be responsible for notifying all candidates at the same time of materials or services which are available to them. All service requests must go through the IEA Executive Director or their designee. Contents of campaign material will not be regulated by the IEA when distributing campaign material and will not be read before distribution. The IEA shall not censor campaign material in any way. Candidate's requests for distribution to only a portion of the membership is permitted if such distribution is feasible.

(3) No IEA equipment, supplies, or labor may be used except as specified in these policies.

(4) Once within 30 days before the election, candidates will be allowed to inspect (not copy) a list of members and compare to their records. All requests to inspect lists must go through the IEA Executive Director or their designee. When a candidate chooses to inspect the member list, all other candidates will

be notified. Candidates will be under the supervision of the IEA Executive Director or designee while inspecting the lists.

f. Use of IEA staff and facilities IEA staff employees may not contribute to, support, or engage in campaign activities or facilitate campaign activities of candidates for office at the local, region, state or national Association levels. Staff may assist candidates or their committees in securing logistical or regulatory information necessary to the conduct of the campaign consistent with the election guidelines.

g. Electronic Equipment or Services A candidate for IEA office may not use any equipment or supplies owned by the IEA, for campaign purposes.

A candidate for IEA office may use for campaign purposes any electronic equipment or service to which he or she has access without the expenditure of any resources by NEA or its affiliates, provided that the candidate may not receive any assistance in such use from any individual who at the time of providing the assistance is receiving compensation from NEA or its affiliates. A candidate has complete control over the content of messages that he or she transmits on such equipment or service.

No candidate may remove a campaign message placed by another candidate on IEA online message boards. The IEA may prohibit all candidates from placing any campaign messages on IEA online message boards, provided candidates receive notice of such prohibition and the prohibition is enforced in a uniform manner.

h. Association Meetings A social or fundraising event promoting a candidate for IEA office may be sponsored in conjunction with a meeting of the IEA or affiliate provided the candidate or campaign committee is responsible for all costs incurred in connection with the event and that all other candidates for the same position are given an opportunity to sponsor a comparable event in conjunction with the meeting.

i. Campaigning at Local, Region or State Association Functions Campaign activities by a candidate for an IEA position at a local, region or state function (meeting, conference, social event, etc.) must be incidental to the function and must not intrude on the planned program. Campaigning may take place before or after the function and between sessions of the function (i.e., at meal breaks). For example, a candidate's campaign workers may place campaign materials at the places of participants or observers prior to the opening of the meeting or may distribute campaign material to participants outside the entrance of the meeting room. A campaign worker, however, would not be permitted to distribute campaign material once the meeting has begun or to announce a campaign-related activity during the meeting. An exception: Any candidate for any Association position must be granted at least 3 minutes on the agenda of a governance region's pre-Delegate Assembly meeting for the purpose of promoting his/her candidacy, provided that the region leadership or the region office is informed at least 24-hours in advance of the candidate's intent to appear. (03)

j. Campaigning by IEA Officials Campaigning by elected or appointed IEA officials, when on assignment for IEA or when traveling at IEA expense, must be incidental to the assignment and must not interfere with the official's duties. For example, an IEA official who is a candidate for office and assigned to represent the Association at a meeting is permitted to meet with supporters or campaign committee members during off-duty hours. All expenses incurred in connection with such a campaign meeting are campaign expenses and are not chargeable to the IEA.

The hotel room of a candidate traveling on assignment at IEA expense may be used for campaign purposes (i.e., a meeting of the campaign committee or a social event),

provided IEA is reimbursed on a pro rata basis for the time the room was used for such purposes. The amount of the reimbursement is computed as follows: the daily room rate is divided by 24 (hours) to determine an hourly room rate. The hourly rate is multiplied by the number of hours the candidate's room was used for campaign purposes. The total amount should be remitted to IEA or deducted from the official's expense reimbursement.

**3. Allowance for Ballot Write-in option for IEA Elective Office**

Pursuant to provisions of the IEA Constitution, Article VII, the following procedures shall be applied:

a. This section allowing for a ballot write-in option applies to the offices of IEA President, IEA Vice President, NEA Director, IEA Representative on the NEA Resolutions Committee, IEA At-large Board member, ESP IEA Board member at large, IEA Board members representing IEA governance regions, IEA Retired members on the IEA Board of Directors. (IEA Constitution, Article IV, Sec. 1.)

b. Nominations for these offices shall close two months prior to the annual Delegate Assembly (IEA Constitution, Article IV, Section 1.)

**4. Balloting Procedures (See also DA Standing Rule 11.3)**

IEA state elections shall be conducted by either electronic, mail in paper ballots or a combination of the two. The method for conducting elections shall be determined by the Board of Directors for each election cycle. (20)

**Use of Electronic Balloting (20)**

- a. Electronic balloting shall be conducted in such a way as to ensure that only IEA members are able to vote, and the member's actual vote remains anonymous.
- b. Electronic balloting shall be contracted through a third-party provider that meets the parameters set forth by the Board of Directors for that election cycle.
- c. Preparation and Procedures
  - (1). Multiple vendors shall be contacted in order to determine availability, pricing and turnaround times.
  - (2). Vendor shall be chosen by the Executive Director or designee based on its ability to meet the current needs of the Association.
  - (3). Vendor shall be granted administrative access to the IEA elections website.
  - (4). Vendor shall generate unique voter identifiers and links for each region/local.
  - (5). IEA Staff shall determine the exact number of voter identification numbers needed for each election cycle, and notify the vendor.
  - (6). IEA Staff shall provide a complete list of eligible member voters which will include the member names, region/local and email addresses to the vendor.
  - (7). Vendor shall tabulate all votes cast by the established deadline, and report the results to the elections Committee Chair and Executive Director within 24 hours of the voting deadline.

## Use of Paper Ballots

### a. Preparation and Procedures

(1). A four-piece mail ballot package shall be the method of conducting IEA state elections. The contents and arrangement of the ballot package are described below. All other forms of proxy or absentee voting shall be expressly prohibited.

(2). Elections officials shall prepare and maintain an accurate voter eligibility list with up-to-date member addresses. In order to facilitate ballot sorting and voter identification at the tally of ballots, election officials shall assign an eight (8) digit sequential number to each member's name on the eligibility list. The voter eligibility list shall be organized by region, then alphabetically by last name. Fifty (50) unassigned numbers shall be left vacant between each local/chapter in order to add new members or make other administrative changes as necessary.

(3). Notification of elections will be mailed to all members following the elections timeline established by the Board of Directors. Notification will be made either through a mailed postcard or through a membership-wide, mailed publication such as the "IEA Reporter", or through the ballot itself provided it is made receivable at least fifteen (15) days prior to the close of the election. Notification will include: instructions for voting, the election timeline, and any other relevant information.

(4). The format of the postcard or other mailed notification shall be reviewed and approved by the Elections Committee for final approval by the Board of Directors.

### b. Ballot Mailing Procedures

(1). Ballot packages for all IEA statewide elections shall be sent to the mailing addresses of each IEA eligible voting member. Ballots for the election of governance region members on the IEA Board of Directors will be prepared at the IEA state level and sent to the mailing addresses of the eligible voters of the applicable region.

(2). Included with ballot packages for IEA state elections will be balloting instructions and timelines.

(3). In the event of a ballot for a Constitutional amendment, proposed language shall be printed on a separate page or a link shall be provided to a page on the IEA website if feasible, and a question which briefly summarizes the change shall be printed on the ballot. (18)

### c. Ballot Packaging

(1). Ballot packages shall consist of four integral parts, referred to below as "Ballot," "Secret Ballot Envelope," "Return Ballot Envelope," and "Large Mailing Envelope."

i. Ballot. The format of the ballot will be determined by the Elections Committee to conform with all applicable laws and shall be approved by the Board of Directors.

ii. Secret Ballot Envelope. This small envelope, either blank or printed with the words "secret ballot envelope," will be used by the voter to enclose the marked ballot. Members shall be

advised not to place any identifying information on this envelope. It is recommended that a standard No. 6 ½ envelope or comparable envelope measuring 3 ⅝" by 6 ½" be used for the Secret Ballot Envelope.

iii. Return Ballot Envelope. This postage-paid envelope will be used by the voter to return the secret ballot envelope with the marked ballot sealed inside. It shall be pre-addressed to a post office box designated for the receipt of returned voted ballots and contain space for the voter to print their name and address in the upper left corner. The voter identification number (which corresponds to the voter's number on the voter eligibility list) should appear in the lower left corner of this envelope. It is recommended that a standard No. 9 envelope or comparable envelope measuring 3 ⅞" by 8 ⅞" be used for the Return Ballot Envelope.

iv. Large Mailing Envelope. This large envelope will be used to mail the other mail ballot items to each member. The return address should be a post office box designated solely for the receipt of ballot packages returned undelivered so that they can be mailed by election officials after correct addresses have been obtained. It is recommended that a standard No. 10 envelope or comparable envelope measuring 4 ⅛" by 9 ½" be used for the Large Mailing Envelope.

d. All paper ballots received in the IEA office by the deadline date shall be counted if the intent of the voter can be determined.

e. Ballot Tabulation: To facilitate an accurate and unbiased count of the IEA statewide election ballots the following procedures will be followed:

(1). The Elections Committee will annually create and oversee the process to assure the receipt and security of paper ballots outside of the IEA headquarters and without involvement of IEA staff, with due respect to the policies and guidelines stated herein, and while meeting the requirements of the LMRDA.

(2). In no case shall any Secret Ballot Envelope be opened prior to the counting of ballots. In the event that a ballot is received in an unsealed envelope, the ballot will be placed with the group of challenged ballots.

(3). The IEA President and Elections Committee Chair shall appoint a committee of at least four members (excluding IEA staff) to tabulate paper ballots for statewide office positions and/or amendments to the IEA Constitution.

(4). All official candidates or their designated representatives will be allowed to witness the counting and tabulation of the election ballots.

(5). The IEA Executive Director or designee and at least one member of the IEA Elections committee will be present to oversee the counting of ballots.

(6). The counting of election ballots will occur within the time-line established by the IEA Board of Directors.

(7). The counting of those ballots will occur within a secured area of the IEA State Headquarters office.

(8). Prior to counting those ballots the following protocol will be followed:

- i. All ballot envelopes will be checked to verify specified election postmark date.
- ii. Any ballot envelope that has been challenged on the grounds of lapsed membership, other irregularities, or by being questioned by election officials, candidate observers, or members shall be separated into a separate group with all reasonable and prudent efforts being made to preserve the anonymity of the voter. To the extent possible, challenged ballots should be resolved prior to the conduct of counting votes to help preserve secrecy.
- iii. Prior to the start of the counting of ballots, decisions about the counting of each challenged ballot shall be announced to those in attendance and the reason for each decision shall be explained to any observers. Election officials should record the decision as to whether to count the ballot on the front of the challenged Secret Ballot Envelope (such as “eligible” or “not eligible”) and initial and date it.

(9) Eligibility

- i. Members who are not up to date on their dues shall be deemed ineligible to vote.
- ii. No member shall be deemed ineligible to vote due to the failure of their employer or local leadership to forward or remit their dues taken by payroll deduction.

- f. Ballot Counting Protocol The counting of those ballots will use the following protocol:

(1). Sorting

- i. Secret ballot envelopes will be divided into groups cross-referenced with the voter eligibility list and sorted by affiliation, then organized into groups of fifty (50) when there are fifty (50) or more ballots for an affiliate.
- ii. In the case of any irregularities or a ballot not aligning with the voter eligibility list, the ballot will be placed into the group of challenged ballots.

(2). Members of the election tabulation committee will be divided into pairs for the official counting of the ballots.

(3). One member of the pair will orally state the name of the candidate or Constitutional amendment for which the vote was cast. The other member will tally the vote.

(4). At the conclusion of counting 50 ballots, pair members will change roles and recount those ballots.

(5). In the event there is a counting discrepancy, those 50 ballots will be set aside and given to another tabulation committee pair for counting.

(6). Results shall be recorded in such a manner that the following vote counts are apparent and reportable:

- i. Vote counts by IEA Governance Region
- ii. Total vote counts.

(7). If during the counting of the secret paper ballots, members of the election tabulation committee cannot determine the intent of the voter, that portion of the specific ballot will be declared invalid.

(8). The ballots and tabulation sheets will be secured in the IEA headquarters offices for one year from the announcement of the results, at which time all elections materials shall be destroyed.

g. Should the voting process include both electronic and paper ballots, then both procedures listed above shall be utilized. (20)

h. Election Results and Notification

(1). Upon the completion of electronic and/or paper ballot tabulation, the results shall be reported to the Chair of the Elections Committee and the IEA President. (20)

(2). The Chair of the Elections Committee will notify the candidates and the IEA Board of Directors of the results. If the Chair is unavailable, the IEA President will notify candidates and the IEA Board of Directors of the results. A public announcement will be made by the IEA President only after all candidates have been notified of the results.

i. Process to Challenge Elections

(1). A process for filing challenges to elections is provided as follows:

- i. Challenges will only be entertained if they are filed within 14 days after the challenger knew, or reasonably should have known, of the alleged violation.
- ii. Challenges must be filed with the IEA Executive Director. The Executive Director and the IEA General Counsel will determine the validity of the challenge.
- iii. If the challenge is found to be valid, it will be referred to the Elections Committee.
- iv. The committee will assemble all relevant information, deliberate, and present their findings and their decision to the Board of Directors.
- iii. The result brought to the Board of Directors shall be heard in Executive Session. The Board of Directors shall only conduct a limited review of the results, strictly to ensure that the process was properly followed.

j. Certification of Election Results Election results will be declared official on the fifteenth (15<sup>th</sup>) day after the close of the elections, provided there is no challenge to the

election under review.

k. The person elected to any statewide office of the IEA must receive the highest number of the total votes cast by the membership for this office.

**5. Guidelines for Region Governance Leadership in Assisting in the Conducting of Elections for governance region Board of Directors Members. (14)**

a. Written notification of a pending vacancy and subsequent nomination and election for IEA Board of Directors member(s) from a region shall be provided to region governance leadership (see "1. Nominating Procedures" paragraph f. above.) (14, 19)

b. Nomination shall be open to active members only and shall be by nomination form provided by the IEA (see form attached). Nomination forms shall be submitted by candidates to the IEA headquarters office on a schedule adopted by the IEA Board of Directors (see "1. Nominating Procedures" paragraph f. above.) (09, 14, 19)

c. The governance region leadership shall assist in the election process as described in "1. Nominating Procedures" paragraph e. above. In all cases, the nomination of, balloting for and tabulation of results for governance region Board of Directors members shall take place on a schedule adopted by the Board of Directors and consistent with the elections schedule for other statewide elections. (14, 15)

d. Members of the Board of Directors elected from each region shall be nominated according to procedures established by the Board of Directors and elected by plurality ballot in that region. (18)

e. When a new position is created by an increase of membership, the initial term of that position must insure that the principle of staggered terms is upheld.

f. The IEA President shall cause the elections subcommittee of the IEA Board of Directors to report the election results to the Board of Directors who shall certify the election. The IEA President shall notify all candidates of the result of the election as soon as possible following the certification of the results by the IEA Board of Directors. (14)

g. Except for logistical assistance and support of the process, no IEA staff member is to participate in the aforementioned elections process. (14)

**6. Guidelines for local associations in the conducting of elections for local, cluster, and state delegates to the NEA Representative Assembly.**

a. All delegates and successors to the NEA RA must be elected.

b. Only active members (certified K-12 or ESP) are eligible to run for any available local, cluster, or state delegate slot to the NEA RA.

c. Locals must ensure that open nominations occur for local, cluster and state delegate slots to the NEA RA.

d. Each active member (certificated K-12 or ESP) is entitled to a secret ballot in the election of local, cluster, or state delegates to the NEA RA.

- e. Only active members (certificated K-12 or ESP) are entitled to vote for local, cluster, or state delegates to the NEA RA.
- f. Electronic and paper ballots for state delegate positions to the NEA RA shall be sent to the email or mailing addresses of each IEA eligible voting member in accordance with the procedures listed above. Ballots will be prepared at the IEA state level. (20)
- g. All electronic and paper ballots for state delegate positions to the NEA RA must be returned to the IEA office by the timelines adopted by the IEA Board of Directors (see instructions attached). The deadline for the return of ballots to the IEA headquarters office must be prior to the meeting of the IEA Board of Directors held before each annual IEA Delegate Assembly so that the elections subcommittee of the IEA Board of Directors may report the results to the IEA Board of Directors who shall certify the results of the election. (14, 20)
- h. Balloting for local and cluster delegate positions to the NEA RA must follow the provisions of paragraphs a, b, c, d and e above. Names of duly elected local and cluster delegates and elected alternates to the NEA RA must be reported to the IEA by the deadline adopted by the IEA Board of Directors. That deadline for the report to the IEA headquarters office must be prior to the meeting of the IEA Board of Directors held before each annual IEA Delegate Assembly so that the elections subcommittee of the IEA Board of Directors may report the results to the IEA Board of Directors who shall certify the results of the elections. (14)
- i. The election of cluster delegates to the NEA RA must follow the policy adopted by the IEA Board of Directors for cluster delegates. The election must also follow the guidelines of paragraphs a, b, c, d and e above and is the responsibility of the local associations clustering for the purposes of electing a cluster delegate. (2001)
- j. A caucus of all duly elected state, local, and cluster NEA RA delegates shall be held at the IEA Delegate Assembly, for any of those elected NEA RA delegates who may be in attendance, for the purpose of discussing the details of the pending NEA Representative Assembly. Communications with all duly elected NEA-RA delegates will commence as soon as possible.
- k. Except for logistical assistance and support of the process, no IEA staff member is to participate in the aforementioned elections process. (14)

- 7. **Procedures in case of a vote tally tie.** In all cases, and for all elective positions under the purview of the Idaho Education Association, and where all provisions required by all governing documents of the Idaho Education Association have been complied with, should there be a tie in the tally of votes for any elective position, the results of the election shall be determined by lot. The terms of the lot must be agreed upon by all candidates impacted by the tie. (14)

**NOTE:** For further information on balloting, campaigning and elections, see IEA Delegate Assembly Standing Rules 11 and 12, Exhibit S, IEA Policy Manual.