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## **MEMO**

**TO:** State Association Presidents  
Local Association Presidents

**FROM:** Jan Rogers, NEA Enterprise Data & Information Strategy  
Keira McNett, NEA Staff Liaison, Credentials Committee

**DATE:** January 2023

**RE:** 2023 Representative Assembly  
Delegate Allocation, Election Requirements and Reporting Delegates to NEA

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This condensed memorandum along with the booklet *Requirements for the Allocation and Election of Delegates to the NEA Representative Assembly* provide information for assuring that delegates are properly elected and reported. The entire Association President memo and the booklet are located at [nea.org/delegaterequirements](https://nea.org/delegaterequirements).

All forms and documents, including the "State Affiliate RA Contact Information" list, are accessible at [nea.org/delegaterequirements](https://nea.org/delegaterequirements). Locals should use the contact information provided on this list to submit their election report(s) to their state affiliate. Election reports must be submitted no later than April 10 or at an earlier due date established by the state affiliate. These submission deadlines are critical to ensuring timely entry of all elected delegates prior to the RA registration process.

Local affiliates without an email address on file will need to contact their state affiliate for additional information.

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### **Official Delegate/Successor Election Report Form Instructions**

This memorandum provides the number of delegates allocated to your association based on the number of NEA Active members recorded at NEA as of January 18, 2023. Follow the steps below to record and submit the election results for your affiliate.

- Download the delegate election report forms using this site, [nea.org/delegaterequirements](https://nea.org/delegaterequirements).
- Enter your affiliate name and unit ID along with the **Total NEA Active Members** and the **Delegates Allowed** for your local in the fields provided on the delegate election report form. This information is found in the top portion of the allocation email.
- Using your local election results, starting with the individual with the most votes, begin entering each delegate followed by the successor delegates on the form(s). More than one form may be needed to include all the names on the ballot. Be sure to enter the names of any write-in candidates that were returned in the election. There is no limit on the number of successors who can be elected and reported. Be sure to fill in all the information for each individual.

- A non-work email address is required for each delegates/successors to the RA. **This email address needs to be current, accurate and unique to the delegate or successor**, meaning no other member or delegate is using or sharing the same email address.
- Password-protect all files that you email to your state affiliate contact.
- Email the completed delegate election report form(s) to your state's RA contact by April 10, 2023. A complete list of state RA contacts is found on [nea.org/delegaterequirements](https://nea.org/delegaterequirements). Do not send the forms to NEA!
- In late May or early June, all delegates will receive an online registration link to register for their NEA RA Delegate Credentials. This link will be sent directly to the email address on file for each delegate.
- Once the online registration is complete, a confirmation email will be sent to the email address used to register.

Contact information for the state association and where to submit the election report(s) is available via the link above. For security purposes you are advised not to print the forms; instead, password-protect the file and forward it via email to your state association RA contact. Documentation on how to encrypt or password-protect a Word document is also found on our [nea.org/delegaterequirements](https://nea.org/delegaterequirements) site.

Note: It is important that the complete name of each delegate and successor delegate is used, including suffix. Be sure to add their IMS individual ID (preferred), last 4 SSN, or alternate ID found in the NEA Membership Systems. For emergency purposes we request the delegate's cell phone number.

The locals should forward successor delegate information to the state association along with delegate information. Please be aware that there is no limit on the number of successors who can be elected and reported, and we encourage both state and local associations to report **every name on the ballot** to ensure that there are sufficient successor delegates to replace any delegate who is unable to attend the RA.

**Forward the form(s) to the state association no later than April 10, 2023** (or by any earlier deadline established by the state association) to ensure timely entry of all elected delegates prior to the RA registration process.

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## Proportional Representation by Education Position

To ensure compliance with NEA Bylaw 3-1, which requires that all-inclusive affiliates provide for proportional representation by education position, we request that you give attention to the following:

In the (red) box near the top section of the Delegate Election Report Form, please indicate on line one the number of Category 1 members, and on line two the number of Category 2 members in your association. In making this determination, the following criteria should be used:

- **Category 1 members:** NEA Active members who are *not* Category 2 (see below). Category 1 includes NEA Active members (annual) who are *not* supervisors and NEA Active Life members who are *not* supervisors, retired or staff.
- **Category 2 members:** Includes NEA Active (annual and Life) members who are **supervisors**, retired NEA Life members (NEA Active-Life members who are retired) and staff NEA Life members (NEA Active-Life members who are association staff).
- **Total No. of Members:** Total of both categories.

**Attachment A** includes the information regarding the formula for proportional representation by education position. It is requested that you calculate the composition of your delegation to ensure compliance. You are reminded that in the event of a replacement, the successor delegate must be from the same category as the delegate being replaced.

### **NEA Bylaw 3-1(g) and Delegate Representation**

The NEA Credentials Committee encourages delegates and successor delegates to provide information about their race and ethnicity for the purpose of determining the proportion of delegates per state delegation who identify as American Indian and Alaska Native, Asian, Black, Hispanic, Native Hawaiian and Other Pacific Islander, Multiracial, or some other race/ethnicity, per the goals outlined in NEA Bylaw 3-1(g). This information is kept confidential, and is not required. Failure to report race/ethnicity will not affect the individual's status as a delegate.

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### **Registration of Delegates**

NEA emails delegate credential registration information directly to each certified delegate. These registration emails will be sent in late May or early June to register **online** for the NEA RA. Using the link within that email, the delegates will register for their NEA RA Delegate Credentials. Delegates must ensure that NEA has their correct email address by contacting their State Annual Meeting Coordinator or by updating their information directly via [mynea360.org](http://mynea360.org). Delegate and guests will check in and receive their badges in the Registration Area located in the Convention Center. A delegate badge, in the official NEA RA badge holder, is required for admittance to the Representative Assembly.

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### **Dues Transmittal and Enforcement Procedures**

Your attention is directed to Bylaw 2-9, Dues Transmittal and Enforcement Procedures, included as Attachment B. It requires a local affiliate to have transmitted to the state affiliate sufficient dues so that the state affiliate is able to transmit to NEA at least forty percent of the dues receivable for the year by March 15, and at least seventy percent of the dues receivable for the year by June 1.

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### **Election to Multiple Delegate Positions**

It is permissible for a member to be nominated and elected to as many different delegate positions as they are eligible (e.g., local delegate, state delegate). However, a member elected to more than one position must decide which position to accept and must notify the appropriate affiliates (local and state) no later than June 1, 2023 of the position accepted and the one(s) refused. Upon acceptance of one of the delegate positions, the member relinquishes all claims to the released position(s) and has no further claim to the released position.

If you have questions concerning the policies governing NEA election requirements, please contact Sabrina Tines-Morris, Senior Director, NEA Center for Governance ([satines@nea.org](mailto:satines@nea.org); 202-822-7709); or Paul Birkmeier, Policy Specialist, NEA Center for Governance ([pbirkmeier@nea.org](mailto:pbirkmeier@nea.org); 202-822-7008). For questions concerning administrative procedures regarding the allocation, processing, or registration of delegates and successor delegates, contact Jan Rogers (email: [jrogers@nea.org](mailto:jrogers@nea.org); phone: (202) 822-7799).

Attachments:

cc: NEA Board of Directors  
NEA Executive Committee  
NEA Zone Directors  
NEA Credentials Committee  
State Association Presidents  
State Annual Meeting Coordinators  
State RA Contacts



**ATTACHMENT A**

**Formula for Proportional Representation by Education Position**

This is the basic formula:

<b><u>No. of Category 2 Members</u></b> <b>Total No. of Members</b>	<b>X</b>	<b>No. of Delegates to be elected</b>	<b>=</b>	<b>No. Category 2 delegates to be elected (rounded to the nearest whole number)</b>
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**Example A:** A local has 135 NEA Active members, 20 of whom are in Category 2. The local was allocated 1 local delegate.

<b><u>20</u></b> <b>135</b>	<b>X</b>	<b>1</b>	<b>=</b>	<b>.15</b> <b>(rounded to 0)</b>
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For the local in Example A, the delegate must be a Category 1 member.

**Example B:** A local association has 1,500 NEA Active members, 100 of whom are in Category 2. The local was allocated 10 local delegates.

<b><u>100</u></b> <b>1,500</b>	<b>X</b>	<b>10</b>	<b>=</b>	<b>.67</b> <b>(rounded to 1)</b>
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For the local in Example B, *one* delegate must be a Category 2 member, and *nine* must be Category 1.

Notes:

- Fractional delegates are to be rounded to the *nearest* delegate. If the decimal is .5 or greater, round to the next higher delegate, and if the decimal is less than .5, round to the next lower delegate.
- NEA computes Category 2 entitlement against the number of delegates *elected* rather than allocated. Therefore, if the affiliate elects fewer Category 1 delegates than the number to which it is entitled, the affiliate, as necessary, should adjust downward the number of elected delegates in Category 2 before certifying and submitting the results to NEA.
- If an affiliate is eligible for Category 2 delegates but there are no candidates, the number of delegate positions the affiliate is entitled to must be left vacant.
- Category 2 members may not serve in Category 1 delegate positions. Category 1 members may not serve in Category 2 delegate positions. In the event of a replacement, the successor delegate must be from the same category as the delegate being replaced.

Contact your State's Annual Meeting Coordinator if you need assistance in category 2 calculation.

**ATTACHMENT B**  
**Bylaw 2-9**  
**Dues Transmittal and Enforcement Procedures**

- a. The Association shall enter into contracts with state affiliates governing the transmittal of Association dues. State affiliates shall have the full responsibility for transmitting Association dues from local affiliates on a contractual basis. Local affiliates shall have the full responsibility for transmitting state and Association dues to state affiliates on a contractual basis. Standards and contracts for transmitting dues shall be developed between the state affiliate and each local affiliate.
- b. A local shall transmit to a state affiliate and a state affiliate shall transmit to the Association at least forty (40) percent of the Association dues receivable for the year by March 15 and at least seventy (70) percent of the Association dues receivable for the year by June 1; the percentage shall be based upon the last membership count prior to January 23, and upon a membership year beginning September 1, unless the contracted transmittal schedule stipulates otherwise.
  - (1) A local or state affiliate which becomes delinquent in its contracted transmittal schedule by more than thirty (30) days shall be assessed a penalty of two (2) percent per month on the overdue balance.
  - (2) Except as otherwise provided in 2-9.b (3) or (4), the delegates representing a state affiliate that has not transmitted at least forty (40) percent of the dues receivable for the year by March 15 and seventy (70) percent of the dues receivable for the year by June 1 shall have no right to participate in the NEA Representative Assembly at the Annual Meeting other than to (i) participate in elections for Association officers, and (ii) vote on increases in Association membership dues.
  - (3) Except as otherwise provided in 2-9.b (4), if a state affiliate informs the NEA in writing that a local affiliate has failed to transmit the Association dues in accordance with the dates set forth in 2-9.b and such information is verified by the Executive Director, the delegates of that local shall have no right to participate in the NEA Representative Assembly at the Annual Meeting other than to (i) participate in elections for Association officers, and (ii) vote on increases in Association membership dues. In this event, the delegates of the state affiliate shall have full right to participate in the NEA Representative Assembly at the Annual Meeting.
  - (4) The denial of participatory rights called for in 2-9.b (2) or (3) may be waived by the NEA Executive Committee if the state or local affiliate in question enters into a written contract with the NEA Executive Committee in which it agrees to transmit the delinquent dues on terms that are acceptable to the NEA Executive Committee, provided that the NEA Executive Committee shall not enter into such a contract with a local affiliate until after it has consulted with the relevant state affiliate. The NEA Executive Committee may terminate any waiver granted pursuant to this section if the affiliate fails to comply with the aforesaid contract.