



**Spring 2024
Representative
Assembly**

DELEGATE HANDBOOK AND OFFICIAL PROGRAM

YOUR VOICE.

OUR POWER.

THEIR FUTURE.

OEA Mission Statement

The OEA will lead the way for continuous improvement of public education while advocating for members and the learners they serve.

OEA Vision

To create an Ohio where every student has access to a high-quality public education and where all members are supported, valued, and respected.

OEA Strategic Priorities

- Build OEA and locals' capacity to be more relevant to members.
- Educate and organize members to build support for quality public education.
- Build OEA as a member resource for professional issues.
- Educate and organize OEA and its members to advocate for racial, social, and economic justice.

Greater Columbus Convention Center

Columbus, Ohio

May 10 - 11, 2024

TOP 10 THINGS

all delegates should know:

- 1. Delegates will receive emails with important information prior to the RA—make sure OEA has your non-work email address and that you check it frequently before the RA. If you are not receiving delegate emails, please contact OEA at oeara@ohea.org.**
- 2. All delegates must complete an online delegate registration form before they arrive. All delegates must also go to Delegate Check-in upon arrival at the RA. If a delegate arrives after Delegate Check-in has closed, they must go to the Credentials Committee to be seated.**
- 3. Delegate credentials are mailed to delegates in advance of the RA. If you lose or do not receive your credential, it can be replaced. (See OEA RA Standing Rule 3.06)**
- 4. Supplemental packet items and the delegate handbook are available online through the OEA website in advance of the RA—www.ohea.org/Spring-RA/.**
- 5. The deadline for submitting New Business Items, amendments to the Standing Rules, OEA's Proposed 2024-2026 Strategic Budget, and the Resolutions Report is Wednesday, May 8, at 5:00 p.m. (See OEA RA Standing Rule 1.08) Webforms to submit NBI's and amendments can be found on the OEA website—www.ohea.org/Spring-RA/.**
- 6. As a responsible delegate, you should arrive on time and plan to stay to the end of the RA so that you can fully participate in the democratic proceedings as a representative of your local. An approximate end time is published in the RA Logistical Highlights document available online in the RA supplemental packet.**
- 7. OEA RA proceedings are governed by OEA's Standing Rules—the standing rules can be found in the delegate handbook and are the first item adopted by delegates after receiving a report from the Credentials Committee on how many delegates are in attendance.**
- 8. The Guide to Parliamentary Procedure included in the delegate handbook has very helpful information on how RA business is conducted along with an explanation of the color-coded card system used to communicate with the Chair. Convention Planning Committee members (wearing blue vests on the floor of the RA) are also available to answer questions on how to address items to be brought before the delegates.**
- 9. A New Business Item is defined as specific in nature and terminal in application that requires immediate action by the delegates and carries with it fiscal implications. Therefore, NBIs are brought to vote on the floor of the RA and not by secret ballot. In the Fall, only items that are time sensitive will be accepted.**
- 10. Along with statewide candidate elections, delegates to the Spring RA will also consider changes to OEA's Constitution and Bylaws, amendments to the OEA Resolutions Report, and act on any New Business Items that may be offered. Contested candidate elections and changes to the C&B will be conducted via online secret ballot voting during the lunch break on Saturday, May 11.**

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The OEA will lead the way for continuous improvement of public education while advocating for members and the learners they serve.

Spring 2024

Thank you for serving as a delegate to the Spring 2024 Representative Assembly! In addition to electing new leaders, adopting our Resolutions, considering changes to OEA's Constitution and Bylaws, and debating New Business Items brought by fellow delegates, we will be doing some new and exciting things together at this year's RA. I hope you'll join us for our annual Awards luncheon on Friday afternoon, May 10, to help honor some outstanding educators and others from outside of OEA who have advocated powerfully for public education. We are also hosting a series of pre-RA breakout sessions for leaders to engage, learn, and connect with each other on relevant issues such as student behavior and school safety in our classrooms.



And on Friday evening, we'll be joined by a true champion of public education, the labor movement, and working people—Senator Sherrod Brown.

OEA and NEA are proudly supporting Sherrod Brown in his hotly contested re-election campaign because he has consistently supported policies to improve public education, such as increasing school funding, reducing class sizes, and supporting educators with professional supports and fair compensation. He has been a vocal critic of efforts to privatize education and divert public funds to charter schools and voucher programs.

We come together in Columbus at a time when the need to protect, promote, and strengthen public education is more important than ever. Public education is the great equalizer, giving every child access to quality learning opportunities regardless of race, zip code, or socio-economic status. But underfunding, privatization, and lack of respect for our members and the work they do with students are serious and growing threats. That is why it is essential to elect pro-public education candidates like Senator Brown to office at every level. And it's why this RA is so important for us to organize together to fulfill OEA's vision to create an Ohio where every student has access to a high-quality public education and where members are supported, valued, and respected.

Public education matters, not just as a fundamental right, but as a strategic investment in the future. As we strive to build a just, equitable, and prosperous society, let us reaffirm our commitment to public education and ensure that it remains accessible and excellent for future generations.

I look forward to seeing you in Columbus!

In solidarity,

A handwritten signature in black ink that reads "Scott DiMauro". The signature is fluid and cursive.

Scott DiMauro
President

The OEA will lead the way for continuous improvement of public education while advocating for members and the learners they serve.

Spring 2024

Happy Spring! Welcome to the Spring 2024 Representative Assembly! As the days grow longer, the weather improves, and the school year ends, we can slow down and contemplate what the future holds for ourselves and our families. We can consider the possibilities. Five months into 2024, the year remains full of possibilities – the possibility of the end of gerrymandering in Ohio, the possibility of fair wages for Ohio's lowest-paid workers, and the possibility of electing pro-public education candidates.



United States Senator Sherrod Brown has championed the rights of the working people and public education since elected to the Ohio General Assembly in 1975. In 2015, Senator Brown introduced the Charter School Accountability Act. This legislation was intended to curb "fraud, abuse, waste, mismanagement and misconduct" in charter schools. More recently, Senator Brown has supported the repeal of the Government Pension Offset (GPO) and the Windfall Elimination Provision (WEP), which directly impact the retirement benefits of public employees, including educators. The possibility of his not returning to the U.S. Senate to fight for educators and public education is not a reality we want to see for Ohio.

The Citizens Not Politicians campaign will allow citizens to have a say in creating fair electoral districts in Ohio. It will take the decisions out of the hands of politicians acting in their best interests rather than the interests and needs of all Ohioans.

The One Fair Wage ballot initiative would replace inflation-adjusted annual increases in 2025, 2026, 2027, and 2028 with fixed dollar amounts. Inflation-adjusted annual increases would begin on January 1, 2029.

President Joe Biden and Vice President Kamala Harris are tireless advocates for public education and deserve our support. Their re-election and Senator Brown's re-election will ensure educators have meaningful support in Washington.

OEA members can play a crucial role in turning these possibilities into reality. From now to election day, OEA will ask you to contribute a small portion of your time and energy to support candidates and issues that will benefit educators, students, and communities around Ohio. Please be on the lookout for information on how to engage in OEA's efforts to support pro-education candidates and issues.

Have a great Representative Assembly!

The possibilities are numerous once we decide to act and not react.

— George Bernard Shaw

Sincerely,

A handwritten signature in black ink that reads "Patricia Collins Murdock". The signature is fluid and cursive, with a long horizontal flourish extending to the right.

Patricia Collins Murdock
Executive Director

OEA Board of Directors



Scott DiMauro
President
Worthington



Jeff Wensing
Vice President
Parma



Mark Hill
Secretary-Treasurer
Worthington



Brenda Abels
Huber Heights



Brenda Ames
Elida



Sarah Eisnaugle Bika
Youngstown State University



Adrienne Bowden
Pickerington



Amy Butcher
Westlake



Sharron Callahan
Cardinal



Melinda Campbell
Bethel



Carol Correthers
Lorain



Norvel Crandall
Morgan



Cassandra Daniels
Columbus



Lauren DiMauro
Bay Village



Kelly Duwve
Sylvania



Angel Dyer-Sanchez
Columbus



Michael Faren
Barberton



Julie Garcia
Lorain



Bonita Gauss
Ashland



Dan Greenberg
Sylvania



Paige Harding
Gahanna-Jefferson



Denise Hermetz
Northwestern



Megan Hinz
Columbus



George Hoover
Barnesville



Tonya Horn
Green



Deloris Rome Hudson
OEA-Retired



Rachel Immerman
Kings



Deborah Jackson
Princeton



Lisa Johnson
Columbus



Kristin Jones
Bethel-Tate



Michelle Martin Jones
Canton



Linna Jordan
Hilliard



Marchell Josie
East Cleveland



Jessie Keplinger
Elgin



Marjorie Langston
Hamilton



Tammy LaPlante
Ashtabula



Arthur Lard
Portsmouth



Karen Linch
Wooster



Dwayne Marshall
Gahanna-Jefferson



Barbara Martini
Champion



Dee Meredith
Fairless



Geoff Mize
Westerville



Joie Moore
Pickerington



Carol Nance
Fairfield



David Pryer
Allen East



Kelli Repphun
Jackson



Neil Ritchie
Switzerland of Ohio



Jason Scherer
Field



Kinzey Schilling
Ashland University



Tammy Shelton
SCOPE



Alice Sneed
Winton Woods



Nicole Stratton
Copley-Fairlawn



Amy White
Mad River



Matthew White
West Clermont

The Ohio Education Association's Spring 2024 Representative Assembly

Tentative Schedule

Friday, April 26 Credentials (*name badge with bar code*) will be mailed via the U.S.P.S. to all elected delegates.

Monday, May 6
7:00 p.m. **Virtual Budget Open Hearing** (*advance registration required*)

Tuesday, May 7
7:00 p.m. **Virtual Resolutions Open Hearing** (*advance registration required*)

Wednesday, May 8 SUBMISSION DEADLINES

5:00 p.m. **New Business Items / Budget Amendments**
(A New Business Item is defined as relating to substantive policies or programs for the Association and is specific in nature and has a designated time for application and/or implementation.)

5:00 p.m. **Resolutions Amendments**
(A resolution is defined as a formal expression of opinion, intent, belief, or position of the Association adopted by the Representative Assembly providing the direction in which the Association shall move.)

5:00 p.m. **Standing Rules Amendments**

Proposed resolutions, standing rules, and items of new business may be submitted on the appropriate form by mail before the convening of the Representative Assembly or via an online web form before established deadlines.

Go to the ***Delegate Resources*** area of the members-only section of the OEA website and complete the appropriate web form or mail a form to OEA, ATTN: Referral Committee, 225 E. Broad Street, Columbus, OH 43215. Forms must be received by 5:00 p.m. on Wednesday, May 8.

Friday, May 10

9:30 a.m.	OEA Board of Directors	OEA
1:00 – 2:30 p.m.	OEA Awards Luncheon* <i>(*Advance Registration Required)</i>	Hyatt Regency Hotel-Union A-C Ballroom
3:00 – 5:00 p.m.	Pre-RA Breakout Sessions* <i>(*Advance Registration Required)</i>	GCCC and Hyatt Regency Hotel
3:30 – 4:30 p.m.	Convention Planning Committee	A115, GCCC
5:00 – 7:30 p.m.	Registration/Delegate Check-in /Lost Credentials	A110, GCCC
5:00 – 7:30 p.m.	Exhibit/Vendor Tables	Foyer, Union Station Ballroom, GCCC
6:00 – 7:30 p.m.	First Assembly Session - RA	Union Station Ballroom, GCCC
7:30 – 8:30 p.m.	Senator Sherrod Brown Fundraiser* <i>(*Advance Registration Required)</i>	GCCC
8:30 – 11:00 p.m.	RA Delegate Hospitality Reception Sponsored by the District Leaders Council	Hyatt Regency Hotel – Union A-C Ballroom

Saturday, May 11

8:00 – 10:00 a.m.	Registration/Delegate Check-in /Lost Credentials	A110, GCCC
8:00 a.m. – Conclusion	Exhibit/Vendor Tables	Foyer, Union Station Ballroom, GCCC
9:00 a.m.	Second Assembly Session - RA	Union Station Ballroom, GCCC
90 Minute Break	Secret Ballot Electronic Voting and Lunch (<i>on your own</i>)	
Follows Break	Third Assembly Session - RA	Union Station Ballroom, GCCC

The Ohio Education Association's Spring 2024 Representative Assembly

Caucus Meeting Information

Saturday, May 11

(Starting before the RA at 8:00 a.m.)

- OEA Women's Caucus Room A121
- NWOEA Room A124

(During the Second 45 Minutes of the Voting/Lunch Break)

- OAESP Room A122
- OEA-LGBTQ+ Caucus Room A125

Delegate Information

CREDENTIALS – All elected delegates will be mailed their credentials (name badge with barcoding) via the U.S.P.S. and must go to Registration and check in upon arrival. If you need assistance with a replacement credential, you can visit staff on Friday night or Saturday during the Registration/Delegate Check-in/Lost Credentials hours. See times in the Tentative Schedule.

REGISTRATION / DELEGATE CHECK-IN / LOST CREDENTIALS – All Delegates must register/check in on Friday or Saturday morning. You cannot enter the RA assembly without the appropriate credentials.

OEA delegates can replace lost/missing credentials from 5:00 p.m. to 7:30 p.m. on Friday, May 10, and on Saturday, May 11, from 8:00 a.m. until 10:00 a.m., in the A110 room at the Greater Columbus Convention Center.

SEATING OF LATE DELEGATES – To be seated as a delegate after the Registration / Delegate Check-in / Lost Credentials session closes at 10:00 a.m. on Saturday, you must go to **the OEA Credentials Committee** located in A110 or the Credentials table inside the RA hall.

All alternates/guests can receive meeting materials and will need to register to get an RA badge to be seated in the designated guest seating area.

SECRET BALLOT VOTING AND ELECTION PROCEDURES – There will be secret ballot elections/voting at this RA. You will receive an email with voting instructions. You may use your cell phone device or go to room A110 during the voting/lunch break to utilize a station or for any assistance.

FOOD CONCESSIONS will be available onsite – Take care of yourself, eat, and take breaks as needed. There will be one 90-minute break scheduled during the RA on Saturday. No outside food can be brought into the facility (other than small personal snack items like granola bars—no coolers, please).

Venue Information

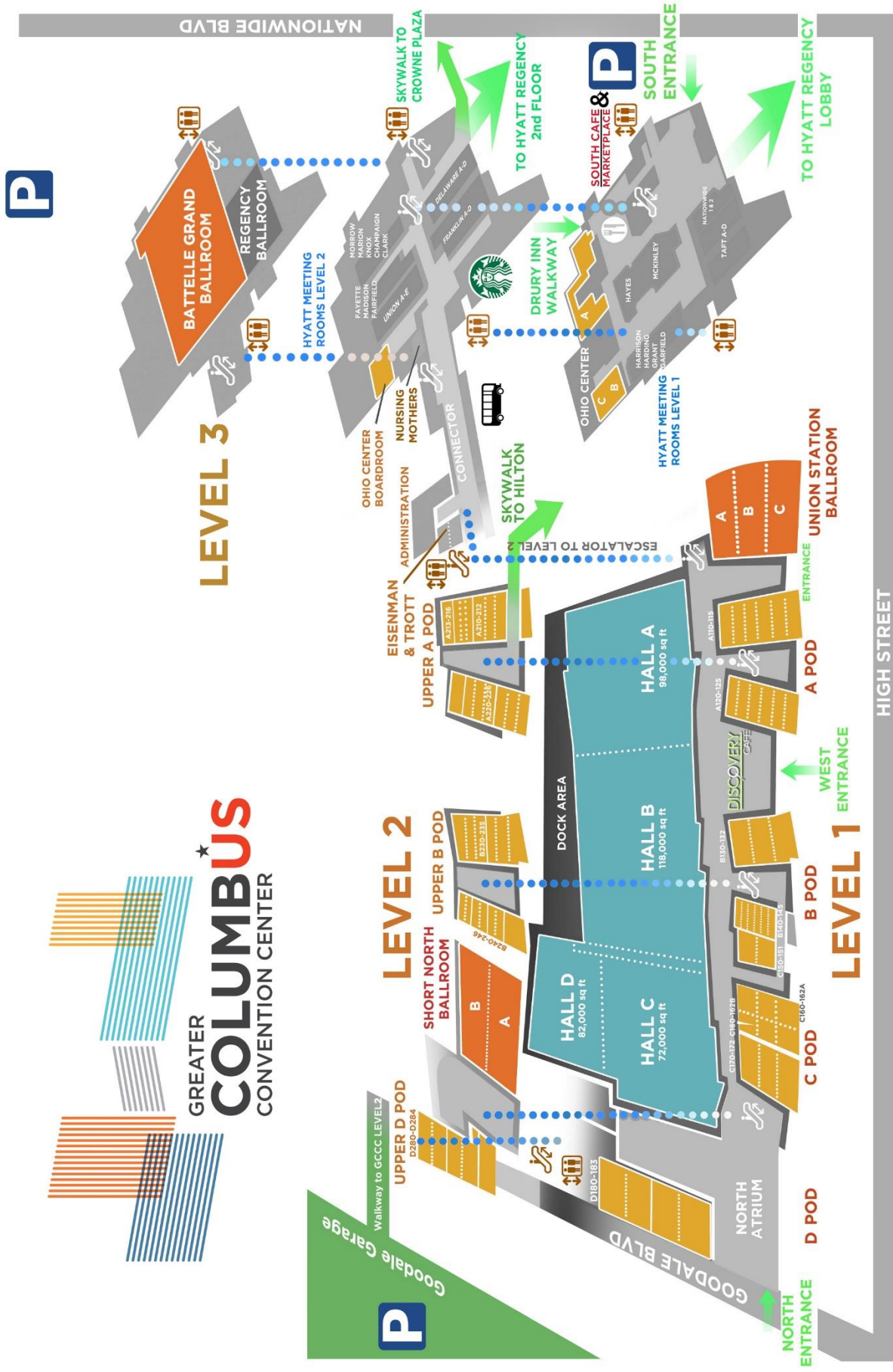
OEA HEADQUARTERS HOTEL – The Hyatt Regency Columbus Hotel, 350 N. High St., 43215, (614) 463-1234, will serve as the OEA headquarters hotel. Please ask for the **OEA room block** when making your housing reservations. Reservation Cutoff Date: April 11, 2024 – Room Rate: \$169 – Single/Double + 17.5% tax – Discounted parking at the Chestnut Garage.

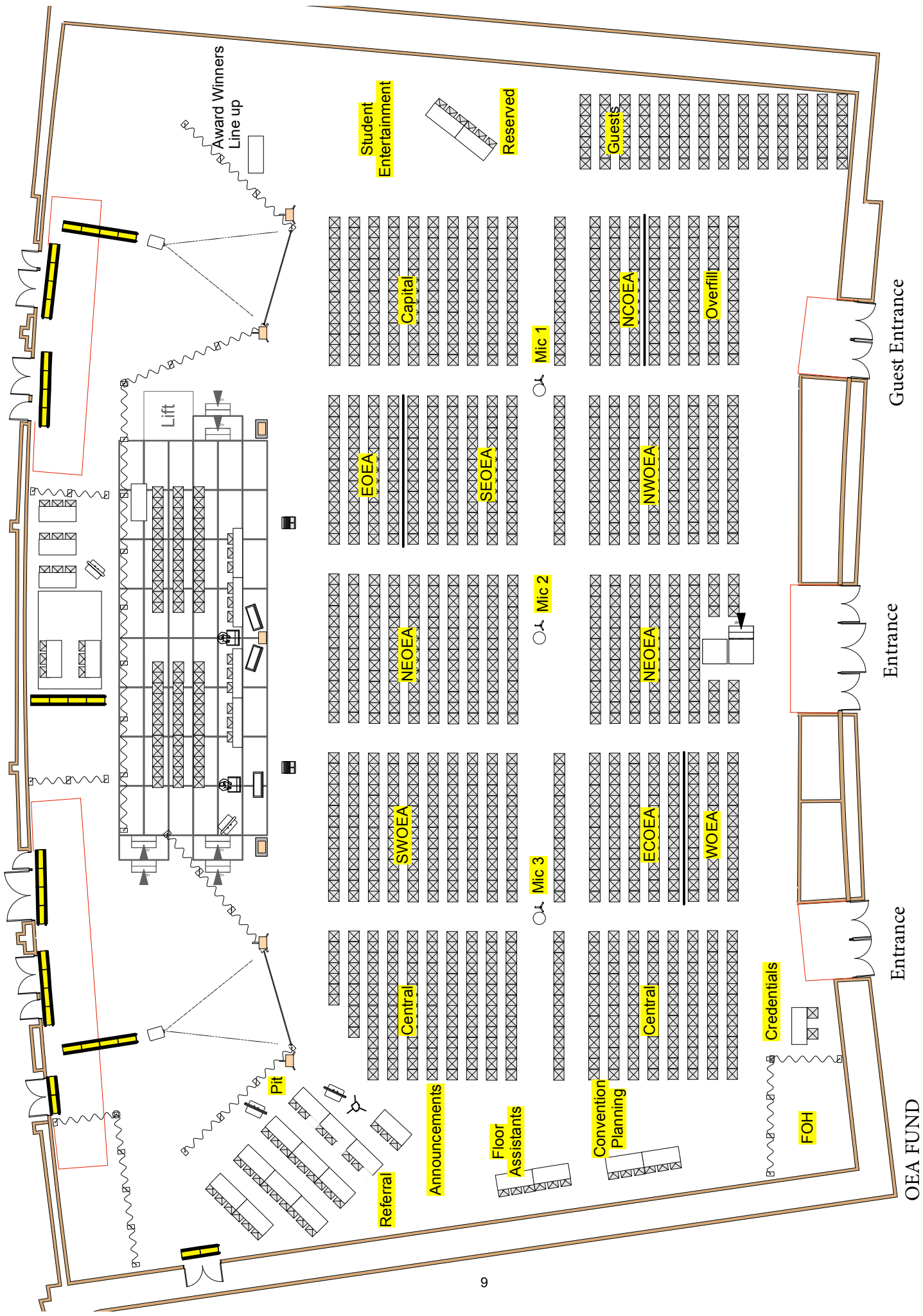
RA VENUE – The OEA Spring 2024 RA will be held at the Greater Columbus Convention Center (GCCC), Union Station Ballroom, 400 N. High St., Columbus, 43215.



GREATER COLUMBUS

 CONVENTION CENTER





RA Floor Plan with Designated District Seating - Spring 2024

Order of Business
Friday, May 10

Registration / Delegate Check-in / Lost Credentials – 5:00 – 7:30 p.m.

Pre-RA Entertainment Sponsored by the CAPITAL District – Columbus Alternative High School Chorale

First Assembly Session (6:00 p.m.)

President Scott DiMauro Presiding

Call to Order

Opening Ceremony

Native Land Acknowledgment (Tonya Horn, Member of the OEA Board of Directors)

Pledge of Allegiance (Sarah Eisnaugle Bika, Member of the OEA Board of Directors)

National Anthem

Introductions

Platform Guests (Board of Directors, Past Presidents, District Presidents, Convention Planning Committee)

ACTION ITEM – Preliminary Report – Committee on Credentials (Chaunta Bennett, Credentials Committee Chair)

ACTION ITEM – Adoption of Standing Rules (Barb Armour, Convention Planning Committee Chair)

ACTION ITEM – Adoption of the Agenda with Flexibility

**The agenda may be interrupted to recognize special guests and to announce other important items.*

Kickoff for OEA Fund for Children and Public Education

Report of the Referral Committee (Dwayne Marshall, Referral Committee Chair)

Recognition of OEA Awards & Scholarships

Fiscal Fitness Awards (Mark Hill, Secretary-Treasurer)

NEA Directors' Report

Address by US Senator Sherrod Brown

Recess for the Evening

******* YOU ARE INVITED TO A RECEPTION *******

JOIN THE DISTRICT LEADERS' COUNCIL on

FRIDAY, MAY 10 from 8:30 – 11:00 PM

in the Hyatt Regency Hotel – Union Ballroom

Enjoy some music and the opportunity to dance and socialize with your fellow delegates!

Order of Business

Saturday, May 11

Registration / Delegate Check-in / Lost Credentials – 8:00 – 10:00 a.m.

Second Assembly Session (9:00 a.m.)

President Scott DiMauro Presiding

Call to Order

Report of the Nominations Committee (Jennifer Long, Nominations Committee Chair)

Candidate Speeches

Report of Constitution and Bylaws Committee (Dwayne Marshall, Constitution and Bylaws Chair)

President's Report

Recognition of the 2024 OEA ESP of the Year

ACTION ITEM – Appeals Board Appointment

Executive Director's Report

Legislative Update (Jeff Wensing, Vice President)

Interim Report – Committee on Credentials (Chaunta Bennett, Credentials Committee Chair)

Proposed 2024-2026 Strategic Budget (Mark Hill, Secretary-Treasurer)

Recognition of the 2024 Ohio Teacher of the Year

ACTION ITEM – New Business

Election and Voting Procedure (Neil Ritchie, Elections Committee Chair)

Recess for Lunch and Voting – Immediately after the close of the morning session the polls open for

voting: The opening time of the electronic election/voting will be announced by the President from the stage and the polls will close 90 minutes after the end of the morning session.

Third Assembly Session (Begins 90 minutes after the closing of the morning session)

President Scott DiMauro Presiding

Call to Order

OEA Fund For Children and Public Education Awards

Report of Elections Committee (Neil Ritchie, Elections Committee Chair)

Report of the Resolutions Committee (Bethany Bell, Resolutions Committee Chair)

ACTION ITEM – Adoption of Resolutions Report (Bethany Bell, Resolutions Committee Chair)

ACTION ITEM – New Business

ACTION ITEM – Final Report – Committee on Credentials (Chaunta Bennett, Credentials Committee Chair)

ACTION ITEM – Report of Elections Committee (if necessary) (Neil Ritchie, Elections Committee Chair)

Recognition of Outgoing Board of Directors Members

Introduction and Installation of New OEA Officer and Board Members

Reading of Titles for Constitutional Amendments for December 2024 Representative Assembly

(Dwayne Marshall, Constitution and Bylaws Committee Chair)

OEA Fund for Children and Public Education Fund Raising Giveaway

Announcement of Positions Open for Election and Declared Candidates

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STANDING RULES OF THE REPRESENTATIVE ASSEMBLY

SECTION 1 ORDER OF BUSINESS AND DEBATE

ADOPTION

1.01 - The adoption of the Standing Rules of the Representative Assembly shall be the next item of business following the report of the Convention Planning Committee on Credentials at the opening session of the Assembly.

AGENDA

1.02 - The Agenda, as adopted by the delegates, constitutes the official order of business for the Representative Assembly.

RULES

1.03 - The meetings of the Representative Assembly shall be conducted in accordance with the provisions of the OEA Constitution and Bylaws, the Standing Rules, and special rules incorporated herewith. Delegates may attend either in-person or virtually as determined by the OEA Board of Directors. Cases not specifically covered otherwise shall be governed by the current edition of *Robert's Rules of Order Newly Revised*.

PARLIAMENTARIAN

1.04 - There shall be an official parliamentarian, to whom questions may be directed through the presiding officer only.

Members of the Convention Planning Committee will be made available on the main floor of the Convention to assist the delegates in the preparation of written materials and/or in the utilization of proper parliamentary procedures when addressing the Representative Assembly.

REFERRAL COMMITTEE

1.05 - A Referral Committee, composed of the Chairpersons of the Legislative and Resolutions Committees, Chairperson of the Constitution and Bylaws Subcommittee of the OEA Board of Directors and a Retirement Representative, shall be established to advise prospective makers of resolutions and motions prior to the presentation of such business to the Representative Assembly, and to assist the President with the handling of motions and resolutions during business sessions. The Chairperson of the Constitution and Bylaws Subcommittee shall serve as the Chairperson of the Referral Committee. If any committee member is not available, the Chair may appoint a substitute.

NEW BUSINESS ITEM-SUBMISSION

1.06 - Introduction of business shall be accomplished by presenting a copy of a New Business Item, a Resolution, or a Legislative Item on the appropriate form to the Referral Committee. The "maker" of the item must be properly identified along with the "second." Items will be numbered chronologically upon receipt. The President, through the Referral Committee, reserves the right (1) to group items chronologically according to category, i.e., resolutions, legislation, etc., and (2) to urge makers of similar motions to caucus on the possibility of drafting a single proposal for Assembly action.

INTRODUCTION OF BUSINESS - BY MAIL

1.07 - Proposed legislative items, resolutions and items of new business may be submitted on the appropriate form by mail prior to the convening of the Representative Assembly and/or via an online webform prior to established deadlines.

INTRODUCTION OF BUSINESS - AT THE ASSEMBLY

1.08 - All amendments to these standing rules, legislative items, resolutions, the budget, and items of new business proposed by delegates must be introduced in accordance with the adopted Agenda by 5:00 p.m. the Wednesday prior to the first meeting of the Representative Assembly.

BUSINESS ITEMS - DISTRIBUTION

1.09 - All items of business introduced for consideration of the Representative Assembly shall be provided to delegates electronically. Printed copies will also be available on-site.

OBTAINING THE FLOOR

1.10 - A delegate wishing to speak before the Assembly must first be recognized by the chair and then must provide the following information either in person or through the virtual interface: full name, unit of representation and purpose of speaking.

RESOLUTION/NEW BUSINESS/LEGISLATIVE COMPOSITION AND ASSISTANCE

1.11 - Delegates wishing to offer resolutions, items of new business, and legislative items for Assembly action shall be required to present them to the appropriate committee at least one week prior to their presentation to the Referral Committee. The purpose is to edit, clarify, and prevent duplication.

REPORTS OF COMMITTEES - AMENDMENTS

1.12 - Amendments to the reports of committees shall be distributed electronically to the delegates in attendance not later than the last session of the Representative Assembly.

DEBATE - LIMITATIONS

1.13 - No delegate shall speak in debate more than twice on any one motion or subsidiary motion unless permission is granted by a majority vote of the Representative Assembly. Each speaker shall be limited to three minutes on first presentation and one minute on any subsequent presentation. The timekeeper shall signal the presiding officer at the end of the allotted time.

DEBATE - YIELDING OF TIME

1.14 - There shall be no yielding of time.

REQUEST FOR INFORMATION

1.15 - A request for information shall be considered as an incidental motion. A person gaining the floor, either in person or virtually, under a Point of Information shall not debate the motion under consideration.

DEBATE - OBJECTION TO CONSIDERATION

1.16 - The Objection to the Consideration motion shall only be in order immediately after the maker of the motion has had the opportunity to speak to it.

DEBATE - PURPOSE FOR RECOGNITION

1.17 - A person gaining recognition to speak to a motion may not immediately offer a motion to close debate.

PREVIOUS QUESTION - CLOSE DEBATE

1.18 - A motion to close debate (previous question) can be applied to the immediate pending motion or other pending motions on the floor, and shall not be accepted by the Chair until at least one representative of both sides of the issue shall have been given the opportunity to speak.

DEBATE - VOICE VOTE AND VIRTUAL VOTING

1.19 - Voting, other than for elections, shall be *viva voce* except when a division is called for by the Chair or by at least twenty-five delegates. An electronic voting interface for both in person and virtual delegates may be employed by the Chair to maximize participation.

DEBATE - DIVISION VOTE

1.20 - When a division of the assembly is called for and the request has been sustained by 25 delegates or more, a rising vote will be taken. If the rising vote is inconclusive, then a counted rising vote will be taken. The meeting area will be closed during the voting. To be counted, delegates must remain at their seats. The supervision and counting of rising votes shall be the responsibility of the Floor Assistants. Voting may be conducted through an electronic interface accessible to both in person and virtual delegates.

BUDGETARY CONSIDERATIONS

1.21 - A three (3) member committee shall be established to review new business items prior to and during the Representative Assembly. The committee shall consist of the Secretary-Treasurer, the Assistant Executive Director, Business Services, and a designee of the Business/Support/Administration Committee. The committee shall review each new business item submitted and, without changing or eliminating any item, shall make a preliminary estimate of the cost of each item for the current budget and subsequent budgets. Also, a determination will be made as to whether the item is covered in the current program and budget. The report of the committee will appear in writing with each new business item. If it is determined that the motion requires an expenditure of funds which is not already budgeted, the makers of the motion must indicate the budget item or items to be amended in order to maintain a balanced budget.

MOTION - SUBSTITUTIONS

1.22 - When a substitute motion has been made and accepted as in order by the Chair, it shall take precedence over the pending motion and remains pending as amended. The substitute motion can only be amended by addition. The Chair will return to the original motion only if the substitute motion has not been enacted.

NEW BUSINESS - ADJOURNMENT LIMITATIONS

1.23 - A 2/3 vote of the delegates will be required for adjourning an Assembly prior to completion of all new business except in an emergency situation as determined by the presiding officer.

QUORUM

1.24 - A quorum of the Assembly shall be the number of accredited delegates present and voting.

VIRTUAL REPRESENTATIVE ASSEMBLY INTERFACE

1.25 - If a virtual option is provided, delegates who choose to attend virtually bear the responsibility of obtaining access to the appropriate electronic device and applications in order to fully participate in the Representative Assembly.

SECTION 2 **ADOPTION, AMENDMENT, AND SUSPENSION OF STANDING RULES**

ADOPTION

2.01 - The Standing Rules of the Representative Assembly shall be adopted by a majority vote of the Representative Assembly.

SUSPENSION

2.02 - A Standing Rule of the Representative Assembly may be suspended, rescinded, or amended after adoption, by a two-thirds vote of the Representative Assembly.

REPRESENTATIVE ASSEMBLY BREAK PERIOD

2.03 - In consideration of those delegates with physical and/or medical needs, the Representative Assembly shall adopt an agenda that includes a lunch period or break of an appropriate length. The agenda shall not be modified to eliminate the lunch period/break except by suspension, rescission or amendment of this Standing Rule as contemplated at Standing Rule 2.02.

SECTION 3 **CREDENTIALS COMMITTEE CERTIFICATION AND REGISTRATION OF** **DELEGATES AND ALTERNATES**

PURPOSE

3.01 - A subcommittee of the Convention Planning Committee is responsible for examining the credentials of all delegates and recommending to the Assembly for approval, the seating of all eligible delegates.

REPORT

3.02 - The decisions of the Credentials Committee shall be final unless overruled by the Representative Assembly. The chairperson of the Committee shall give a preliminary report at the first session of the Representative Assembly and a final report when the registration is complete.

CERTIFICATION

3.03 - The certification of delegates and alternates is governed by Bylaws 4-9, a-i.

The Representative Assembly may only vote on the seating of a delegate(s) after having heard a report from the Credentials Committee with respect to the seating of such person(s).

REGISTRATION

3.04 - The registration and delegate check-in deadlines for the Representative Assembly shall be established and communicated to delegates at least 30 days in advance of the Representative Assembly.

BADGES - ISSUANCE

3.05 - Delegate badges shall be issued by mail.

LOST CREDENTIALS

3.06 - Delegates participating in person who forget or lose their credentials must present a government issued pictured identification or be recognized by leadership or a member of the Convention Planning Committee prior to the close of registration/Delegate check-in to have their lost credentials replaced. When a virtual option is provided, delegates participating virtually may receive a new unique voting credential by following an established process.

SECTION 4 **ELECTION REQUIREMENTS AND RESTRICTIONS**

DELEGATES' ELECTIONS

4.01 - All Delegates to the OEA Representative Assembly shall be elected by secret written ballot by their respective constituent members in good standing.

FILING OF FORMS

4.02 - All Delegates to the OEA Representative Assembly shall be seated only after all proper forms have been filed with the OEA Secretary-Treasurer.

OFFICERS' ELECTIONS

4.03 - In all elections where OEA officers or directors are elected, whether conducted at a virtual, in person, or hybrid OEA Representative Assembly, district representative assemblies, other annual meetings of divisions, or by mail or electronic balloting of all members of a division, the person or persons in charge of conducting those elections shall preserve the credentials of the delegates, and all Minutes and other records for a period of not less than one year from the election. Such credentials, Minutes and other records, including ballots, shall be made available to the officers of the Ohio Education Association for inspection and examination.

SECTION 5
SEATING ARRANGEMENTS

ADMISSION TO ASSEMBLY

5.01 - In person delegates must wear the official OEA Delegate Badge to be admitted to the designated delegate area. Delegates must be registered and seated to be admitted to the Representative Assembly.

GUESTS

5.02 - Invited guests without specific assembly assignment will be seated in a designated area. Members of the association who are not delegates will be permitted to view the Representative Assembly through livestreaming. With the consent of a majority of the Representative Assembly, a member or guest may address the Assembly.

PRESS

5.03 - Members of the press may be given an officially designated badge and admitted to the Representative Assembly floor if attending in person.

STAFF/COMMITTEE

5.04 - Committee members who need access to the floor of the Assembly shall wear an officially designated badge for identification.

OEA staff with specific assembly assignments and district executive secretaries shall have floor privileges and shall wear proper identification.

OEA DEPARTMENTS

5.05 - The official Representatives of OEA Departments shall be admitted to the floor when attending in person by an officially designated badge for identification and may be recognized by the Chair to address the Assembly on items affecting their group. Said representatives may also attend the Representative Assembly virtually.

SECTION 6
ELECTION PROCEDURES

NOMINATION AND ELECTION

6.01 - Nomination and election procedures for all elective offices of the Ohio Education Association shall be in accordance with the OEA Constitution and Bylaws.

ELECTIONS COMMITTEE

6.02 - A subcommittee of the Convention Planning Committee shall be responsible for the conduct of the annual election of officers and/or any other items on which votes are taken by ballot.

SECRET BALLOT

6.03 - All elections authorized by the Representative Assembly shall be by secret ballot. In the event that after nominations are closed there is only one candidate on the ballot for a position, the secret ballot election shall be dispensed with and the unopposed candidate shall be declared elected to the position. Write-in voting shall be prohibited in all elections subject to Article V, section 3(C) of the OEA Constitution & Bylaws.

NOMINATIONS - OFFICES

6.04 - Nominations where there are no declared candidates shall take place at the first session of the Representative Assembly.

CANDIDATES SPEAKING TIME

6.05 - Each declared candidate for President, Vice-President, and Secretary-Treasurer shall be given the opportunity to make a ten-minute speech on behalf of his/her candidacy to the Assembly. Presidential candidates shall be given a total of twenty minutes and the Vice-President and Secretary-Treasurer candidates shall be given a total of ten minutes during the first session to answer questions by the delegates in the Assembly. Each candidate's response shall not exceed one minute. Candidates in a run off election shall be given the opportunity to appear before the delegates again for five minutes prior to a run off election.

Each declared candidate for Board of Directors and NEA Directors shall be given the opportunity to appear before the Assembly for a three-minute speech on his/her behalf. Audio visual and electronic presentations are prohibited as a part of all candidate speeches.

A person nominated from the floor becomes a declared candidate upon acceptance of the nomination.

BALLOT LANGUAGE

6.06 - Instructions to delegates on the procedure for casting their ballots shall be provided. The instructions shall list the candidate names for each office and give the title and clear intent of the proposed amendments to the Constitution and Bylaws.

ELECTIONS - RUN OFF

6.07 - A runoff election shall be conducted in accordance with OEA Constitution Article V, §3-d.

VOTING RESULTS - REPORTING

6.08 - The results of the voting shall be announced as soon as possible following the close of the polls. The Chairperson or a representative from the Elections Committee shall make an official report to the Representative Assembly at its final session. The names of those elected and/or the results of any other balloting shall be posted visually on the virtual interface and/or emailed to delegates.

VOTE RECOUNT

6.09 - An automatic recount will be held if the difference in number of votes between candidates is two percent or less of the voting delegates.

VOIDED BALLOTS

6.10 - Whenever paper ballots are used in the election procedure, a ballot will be voided if the intent is not clear. If a mistake is made marking a ballot, a new ballot must be obtained from an Election Committee member as provided by the Elections and Conference Coordinator.

RESTRICTED BALLOTS

6.11 - Restricted ballots will be provided for those persons not meeting delegate certification requirements.

VOTING PROCEDURES

6.12 - Voting will take place through an electronic voting service selected by the Elections Committee in consultation with OEA staff and officers. Any method of voting shall be through a secret ballot according to the one member-one vote principle, and the ability for the candidates to designate observers, and the preservation of records pertaining to the election for a period of at least one year.

SECTION 7 **DISTRIBUTION OF NON-CAMPAIGN RELATED MATERIALS**

DISTRIBUTION OF NON-CAMPAIGN RELATED MATERIALS

7.01 - Identification as to the source and sponsor must appear on materials other than those directly related to the function of the convention and authorized by OEA officers, staff, or officially designated groups responsible for preparing Representative Assembly materials. All such materials must have prior approval of the OEA President or his/her designee of the Assembly before being distributed on the floor of the Representative Assembly.

1. All such materials must be presented to the OEA President or his/her designee at least three days before the start of the first session of the Representative Assembly.
2. Use of the OEA, NEA, or UEP logo on such materials is prohibited.

USE OF EXHIBIT AND FUNDRAISING AREAS AT OEA REPRESENTATIVE ASSEMBLY

7.02 - The following rules shall apply to the use of exhibit and fundraising areas at the OEA Representative Assembly:

1. **INTERNAL GROUPS**

“Internal Groups” shall be defined as OEA Representative Assembly Delegates, OEA Local Associations, OEA District Associations, OEA Affiliated Caucuses, OEA Divisions, OEA Departments, declared candidates and OEA/NEA Associate Organizations. Internal Groups shall be permitted to use space reserved for exhibitions and fundraising, to distribute materials or disseminate information related to the agenda of the Representative Assembly, including materials or information that is contrary to, challenges or advocates a change in OEA policy. Such material or information may be prepared by the affiliates, delegates or caucuses themselves, or prepared by others external to the Association.

2. EXTERNAL GROUPS

“External Groups” shall be defined as any group, individual corporation, or entity other than those detailed in “Internal Groups” (7.02.1). External Groups may be permitted space reserved for exhibitions and fundraising for the distribution of materials and information related to the Association’s agenda, provided that such material or information is not contrary to, does not challenge or does not advocate a change in OEA policy. External groups shall be limited to OEA/NEA partners, non-profit, and non-commercial exhibitors.

3. PROCEDURE FOR REQUESTING SPACE

- a. Requests for space must be in writing and received by the OEA Secretary-Treasurer not less than thirty calendar days prior to the beginning of the Representative Assembly. The written request shall include: an identification of the group requesting the space; the name, address and telephone number of the contact person for the group; the number of OEA members holding membership in the group; a description or sample of the materials or information intended to be distributed; and the number of table(s) desired.
- b. A request for space may be rejected if the requirements set forth in this section have not been met.
- c. The Association may prohibit the distribution of any materials or information it determines to be offensive or obscene.

4. ASSIGNMENT OF SPACE

- a. If the total amount of space requested exceeds the amount of space available, Internal Groups shall have priority over External Groups.
- b. If the total amount of space requested by Internal Groups exceeds the amount of available space, the available space shall be allocated on a first-come-first-served basis determined by the date and time the application is received by the OEA Secretary-Treasurer.
- c. If the total amount of space requested by External Groups exceeds the amount of available space, the available space shall be allocated on a first-come-first-served basis determined by the date and time the application is received by the OEA Secretary-Treasurer.
- d. No group shall be granted more than one table until all requests for space have been filled.
- e. No exhibit or fundraising space will be assigned within the polling area as defined in Standing Rule 8.08.

5. PROCEDURE FOR REQUESTING DISTRIBUTION AND/OR DISPLAY

- a. Requests for distribution and/or display of virtual expo material must be in writing and received by the OEA Secretary-Treasurer not less than two weeks prior to the beginning of the Representative Assembly. The written request shall include: an identification of the group requesting the space; the name, address and telephone number of the contact

person for the group; the number of OEA members holding membership in the group; and an electronic copy of the information to be distributed and/or posted.

- b. A request for distribution or display may be rejected if the requirements set forth in this section have not been met.
- c. The association may prohibit the distribution and/or display of any materials or information it determines to be offensive or obscene.

6. ASSIGNMENT OF VIRTUAL SPACE

- a. If the total amount of space requested exceeds the amount of space available, internal groups shall have priority over external groups.
- b. If the total amount of space requested by internal groups exceeds the amount of available virtual space, the available space shall be allocated on a first-come-first-served basis determined by the date and time the application is received by the OEA Secretary-Treasurer.
- c. If the total amount of virtual space requested by external groups exceeds the amount of available space, the available space shall be allocated on a first-come-first-served basis determined by the date and time the application is received by the OEA Secretary-Treasurer.

7. DEFINITIONS

For purposes of this section:

- a. "OEA Policy" means any policy or action by the Representative Assembly, the OEA Board of Directors, the President, Vice President or Secretary-Treasurer, Executive Director or other employees, agents or subcontractors of the Association; and
- b. "Space" in exhibition and fundraising areas shall mean table space.

SECTION 8 CAMPAIGNING

CAMPAIGN COMMITTEE

8.01 - The Convention Planning Committee and one person designated by each of the candidates for the office of President, Vice-President, Secretary-Treasurer, NEA Director and Board of Directors At-Large, shall be responsible for compliance with the Standing Rules for campaigns set forth in 8.02 - 8.12. The vice-chairperson of the Convention Planning Committee shall serve as chairperson of the Campaign Committee.

All candidates must complete the declaration of candidacy form before campaigning. Forms may be requested from and submitted to the Secretary-Treasurer's office prior to the announcement of any candidacy.

NO DUES MONEY MAY BE USED

8.02 - No portion of dues money collected at the local, district, state or national level shall be used to promote the candidacy of any individual for an OEA office.

FILING REQUIREMENTS

8.03 - Candidates for President, Vice-President, Secretary-Treasurer, NEA Director and Board of Directors Member At-Large shall file a form at least 10 days prior to the opening of the Assembly with the Chairperson of the OEA Campaign Committee, setting forth the candidate's budget and total contributions to date. The appropriate reporting forms will be provided to each candidate by OEA. Final report of contributions and expenditures shall be made by each candidate to the OEA Campaign Committee Chairperson prior to the opening of the polls at the Assembly. Candidates for Unit OEA Board of Directors member shall file a form at least 10 days prior to the opening of the District Assembly with the Chairperson of the OEA Campaign Committee setting forth the candidate's budget and total contributions to date. The appropriate reporting forms will be provided to each candidate by OEA. Final report of contributions and expenditures shall be mailed by each candidate to the OEA Campaign Committee Chairperson and postmarked no later than the day of that District Assembly.

Candidates shall designate their appointees, to the Campaign Committee and their Elections Observer, 30 days prior to the Assembly. If a candidate announces after the 30-day limitation, the candidate may appoint a designee at that time. Preliminary tentative rulings shall be made, if necessary, by the members of the Campaign Committee of the Convention Planning Committee.

Candidates will report expenses for all mail-out and pass-out material, hospitality suite expenses and anything identified primarily as a campaign activity. A report of expenditures shall begin from the time the candidate announces his/her candidacy. Travel expenses will not be included.

CAMPAIGN MATERIALS

8.04 - Materialistic gifts may not be distributed. Badges, buttons and ribbons may be distributed. Information relative to the candidate, the candidate's platform or statements on issues before the Assembly shall be printed on single sheets of paper, no larger than 8 1/2 by 11 inches and shall contain a clearly visible name of the source and sponsor. Pictures and slogans may be included in such information.

Campaign posters/materials shall contain a clearly visible name of the source/sponsor, including caucuses and other special interest groups. Use of the OEA, NEA, or UEP logo on material used to promote the candidacy of any individual or individuals for an OEA office is prohibited. Maximum size for campaign materials shall be limited to 17 x 22 inches.

Candidates may submit materials for prior approval to the Campaign Committee prior to distribution to ensure that all compliance has been met.

CAMPAIGN LIMITATIONS AT ASSOCIATION FUNCTIONS

8.05 - Campaign restrictions apply to all events or activities sponsored by OEA, NEA or any of their affiliates. Campaign activities at a local, state, district or NEA function (meeting, conference, social event, etc.) must be incidental to the function and must not interfere with or intrude on the planned program. Campaigning may take place before or after the function and between sessions of the function (e.g., 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 to the meeting room. A campaign worker may not, however, distribute campaign material once the meeting has begun or announce a campaign-related activity during the meeting.

An individual may not campaign for any OEA office more than one year prior to the election for an open position or begin earlier than the end of the last session of the Spring Representative Assembly. Prior to the adjournment of the Representative Assembly, the Chair shall announce positions that will be elected at the next spring Representative Assembly as well as all declared candidates for those positions.

Campaigning for elective office during the Representative Assembly shall be limited to the hotels and Convention Center. There shall be no posting of materials at the Convention Center other than at a sanctioned exhibit area at the Representative Assembly.

Posting of campaign material at all hotels will be restricted to areas governed by hotel regulations. Any bills for damage done to hotel facilities shall be charged to the campaign committee responsible for that material.

Unacceptable campaign materials and practices include posters and/or placards carried by individuals in the assembly hall, distribution of campaign materials within the assembly hall, use of electronic signs within the assembly hall, and campaigning while business of the assembly is being conducted. The assembly hall includes the floor of the Representative Assembly, guest seating area, stage, and any space visible to where the business of the Representative Assembly is being conducted.

Campaign materials may not be worn while seated or addressing the body of from the stage during the Representative Assembly.

CAMPAIGNING BY ASSOCIATION OFFICIALS

8.06 - If an individual is traveling at OEA or affiliate expense to Association events, campaigning is allowed but must be incidental to the assignment and must not interfere with the performance of duties. For example, an OEA official who is a candidate for office and is 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 OEA.

PUBLICITY FOR CANDIDATES

8.07 - Candidates for OEA President, Vice President, Secretary-Treasurer, members of the OEA Board of Directors at-large and NEA Directors shall be given space in *Ohio Schools* magazine to publicize their candidacy as provided for in Policy 500.060.

CAMPAIGN LIMITATIONS DURING VOTING

8.08 - There shall be no distribution of campaign materials inside the convention center when the Chair declares voting to be open.

DELEGATE MAILING LISTS FOR CANDIDATES FOR OEA OFFICE

8.09 - A list of delegate names that includes their home and email addresses or a set of delegate mailing labels shall be sent upon written request to individuals who are candidates for an OEA office as provided in Policy 700.080.

Requests for such lists or labels shall be made to the Executive Director. Such list or labels shall be provided to the candidate or group requesting them upon agreement to pay the charge established under Policy 500.020.

RULE INTERPRETATIONS

8.10 - All decisions of the committee in interpreting the Standing Rules shall be subject to appeal to the Representative Assembly or the OEA Appeals Board.

HOSPITALITY ROOMS

8.11 - Hospitality rooms for delegates attending the Representative Assembly in-person shall close by 2:00 a.m.

VIOLATIONS

8.12 - Any delegate questioning violations of the Standing Rules, Section 8 on Campaigning, should report this to any member of the Convention Planning Committee immediately.

The committee on campaigns may remove candidates from the ballot for flagrant, willful attempts to circumvent the Standing Rules. The committee shall report all infractions of the Standing Rules to the delegates prior to the opening of the polls.

As adopted by Fall 2023 RA

Last amended: Fall 2023 RA

OEA REPRESENTATIVE ASSEMBLY – SPRING 2024

GUIDE TO PARLIAMENTARY PROCEDURE

In order for business to be properly transacted, rules of parliamentary procedure must be followed. The following guide provides some basic parliamentary procedure rules needed by delegates to carry out their wishes in an orderly and efficient manner. Consult Robert's Rules of Order Newly Revised (12th ed., 2020) for a more complete description of parliamentary procedure rules.

I. Obtaining the Floor

- A. Recognition must be gained before a delegate may address the assembly.
- B. To obtain the floor, a delegate must move to a microphone and select the appropriate colored card (Green, Red, White, Yellow) for the action they wish to present.
- C. The delegate shall remain at the microphone until recognized by the Chair, then give the following information:
 - 1. Full name
 - 2. Unit you are representing or speaking as an individual
 - 3. Purpose for speaking
 - a. Proposing a main motion – **Green Card**
 - b. Debating a motion (either for or against) – **Green Card or Red Card**
 - c. Request for Information (Point of Information) – **Yellow Card**
 - d. Parliamentary Inquiry – **Yellow Card**
 - e. Question of Privilege (Point of Personal Privilege) – **Yellow Card**
 - f. Previous Question (Close Debate) – **White Card**
 - g. Other: (See full chart on the color-coded card system – **pg. 29**)

II. Introducing a Main Motion (Green Card)

- A. When a delegate is recognized for the purpose of making a motion, they should move the main motion.
- B. Another delegate seconds the motion.
- C. After the motion has been moved, seconded and stated by the Chair, it is open for debate. Debate shall be limited to 3 minutes on first presentation and 1 minute on the second presentation (See Standing Rule 1.13)

III. Amending a Motion (White Card)

- A. A motion can be changed by use of the motion to Amend.
- B. The purpose of primary amendment is to modify or perfect the main motion. A primary amendment must relate (be germane) to the main motion. Only one primary amendment can be offered at a time.
- C. Four forms of the motion to Amend are:
 - 1. Insert or Add - To insert words, or, if they are placed at the end of the sentence, to add words.
 - 2. Striking Out - Striking out a word(s) or sentence(s) which are consecutive.
 - 3. Strike Out and Insert - To strike out words and insert different words in the same place.
 - 4. Substitution
 - a. Substitution is striking out words, sentences, or the entire motion and inserting different words or proposing a substitute motion.
 - b. If the substitute motion is not acted upon favorably, further amendments can be offered to perfect the original main motion.
- D. Amending an Amendment
 - 1. The purpose of a secondary amendment is to modify or perfect the primary amendment.
 - 2. Only one secondary amendment can be on the floor at one time.

IV. Subsidiary Motions (White Card)

- A. Subsidiary motions help in handling the main motion. Subsidiary motions include:
1. Lay on the Table
 - a. Highest ranking subsidiary motion
 - b. Used to temporarily set the main motion aside to take up an item of immediate urgency.
 2. Previous Question (Close Debate) (See Standing Rule 1.18)
 - a. Can be applied to the immediate pending motion or a series of pending motions.
 - b. Requires a 2/3 vote to pass.
 - c. Immediately closes debate and requires a vote on the pending motion(s).
 3. Limit or Extend the Limits of Debate
 - a. Can be used to limit or extend the limits of debate that are listed in the Standing Rules.
 - b. Requires a majority vote. (See Standing Rule 1.13)
 4. Postpone Definitely - Sets aside the pending motion to a specific time.
 5. Commit (Refer to Committee) - Refers the pending motion to a special or standing committee.
 6. Amend - Changes the main motion by addition, subtraction, or substitution. (See III – Amending a Motion)
 7. Postpone Indefinitely
 - a. Used to kill the main motion without taking a direct vote on the main motion.
 - b. Lowest ranking subsidiary motion.

V. Privileged Motions (Yellow Card)

- A. Privileged motions pertain to special matters of immediate importance that must be handled immediately. Privileged Motions include:
1. Fix the time to which to adjourn - Sets the time, date, and location for another meeting to continue business of the session, with no effect on when the present meeting will adjourn.
 2. Adjourn - Closes the current meeting.
 3. Recess - Take a short recess in the meeting.
 4. Raise a question of privilege (point of personal privilege).
 - a. Asks the assembly for permission to do something. Questions of privilege generally relate to delegate's safety, health, integrity or protection of property.
 - b. Types of questions of privilege
 - (1) Personal privilege
 - (2) Privileges of the assembly
 5. Call for the orders of the day - Requires the assembly to adhere to its published order of business.

VI. Incidental Motions (Yellow Card)

- A. Incidental motions relate, in different ways, to the pending business or to business otherwise at hand. Incidental motions deal with questions of procedure arising out of another pending motion or item of business.
- B. Point of Order - A point of order is raised when there is a violation of the rules of order, standing rules or any other violation.
- C. Parliamentary Inquiry - A parliamentary inquiry is used when a delegate has a question pertaining to a parliamentary rule.
- D. Request for Information (Point of Information) - A request for information is used when a delegate has a question related to a motion before the assembly.
- E. Other incidental motions

1. Appeal
2. Suspend the rules
3. Methods of voting
4. Division of the assembly
5. Division of the question

Prepared by OEA Parliamentarian James Connors (PhD, PRP, PAP) October 2016; *updated for Spring 2024 Representative Assembly.*

COLOR CODED CARD SYSTEM

Card Color	Common Uses
Yellow	<ul style="list-style-type: none"> • Point of Order • Request for Information (Point of Information) • Raise a question of Privilege (Point of Personal Privilege) • Parliamentary Inquiry • Suspend the Rules • Appeal • Divide of a Question • Object to the Consideration of a Question
White	<ul style="list-style-type: none"> • Previous Question (Close Debate) • Limit or Extend Limits of Debate • Commit (Refer to Committee) • Amend • Postpone Indefinitely
Red	<ul style="list-style-type: none"> • Debate against the current pending motion
Green	<ul style="list-style-type: none"> • Move a main motion • Debate in favor of the current pending motion

CHARACTERISTICS OF MOTIONS

The following are the characteristics for all privileged, subsidiary, main, incidental, and motions which bring a question again before the assembly. The privileged, subsidiary and main motion are in order of precedence (highest to lowest). Incidental motions and motions which bring a question again before the assembly do not have an order of precedence.

Motion	Second Required	Debatable	Amendable	Vote Required	Reconsider
Privileged Motions					
Fix the Time to Which to Adjourn	Yes	No	Yes	Majority	Yes
Adjourn	Yes	No	No	(1)	No
Recess	Yes	No	Yes	Majority	No
Raise a Question of Privilege (Point of Personal Privilege)	No	No	No	Chair Grants	No
Call for the Orders of the Day	No	No	No	No vote, demand	No
Subsidiary Motions					
Lay on the Table	Yes	No	No	Majority	Neg only (3)
Close Debate (Previous Question)	Yes	No	No	2/3	Yes
Limit or Extend Limits of Debate	Yes	No	Yes	Majority	Yes
Postpone to a Certain Time	Yes	Yes	Yes	Majority	Yes
Commit or Refer	Yes	Yes	Yes	Majority	Yes
Amend	Yes	Yes (2)	Yes	Majority	Yes
Postpone Indefinitely	Yes	Yes	No	Majority	Affirm. Only
Main Motion	Yes	Yes	Yes	Majority	Yes
Incidental Motions					
Appeal	Yes	Yes (2)	No	Majority	Yes
Division of the Assembly	No	No	No	No vote, demand	No
Division of a Question	Yes	No	Yes	Majority	No
Objection to the Consideration of a Question	No	No	No	2/3	Neg. Only
Parliamentary Inquiry	No	No	No	Chair answers	No
Point of Order	No	No	No	Normally no vote Chair rules	No
Request for Information (Point of Information)	No	No	No	Chair answers	No
Suspend the Rules	Yes	No	No	2/3	No
Withdraw a Motion	No (3)	No	No	Majority (3)	Neg. Only
Motions that Bring a Question Again Before the Assembly					
Reconsider	Yes	Yes (2)	No	Majority	No
Rescind	Yes	Yes	Yes	Maj. with notice or 2/3 (3)	Neg. only
Take from the Table	Yes	No	No	Majority	No

(1) 2/3 vote until completion of all new business, majority vote after completion of new business (Standing Rule 1.23)

(2) If applied to a debatable motion

(3) Refer to *Robert's Rules of Order Newly Revised* (12th edition) for rule(s)

OEA REPRESENTATIVE ASSEMBLY – SPRING 2024

DELEGATE PROCEDURE FOR SUBMISSION OF ALL NEW BUSINESS AND RESOLUTION ITEMS

1. Referral Committee Procedure:

- (a) The function of the Referral Committee is to assist the delegates in bringing proposals before the Representative Assembly. The Referral Committee will convene on Wednesday, May 8, and will review all items submitted. The Committee will determine if these proposals need editorial assistance and assist delegates in determining the proper category for their proposals.
- (b) Per the Standing Rules, a delegate presenting any item will be required to submit it so that it can be **received by** the deadline to the Referral Committee via mail (OEA, ATTN: Referral Committee, 225 E. Broad Street, Columbus, OH 43215) or via webform (available on the OEA website - <https://www.ohea.org/Spring-RA/>).

Again, these items are to be presented to the Referral Committee any time before the deadline. **The following items are due by 5:00 p.m. on Wednesday, May 8:**

- Amendments to the proposed two-year Strategic Budget.
 - Amendments to the Resolutions Report.
 - Amendments to Standing Rules.
 - All other new business items.
- (c) The Referral Committee and staff working with the Committee will assign a number for each item. The time of submission will also be recorded by staff.
 - (d) Each item is sent directly to the Referral Committee for review and to determine its relationship to other items before the Assembly.
 - (e) After the Referral Committee meets on May 8, the proposals will be posted to the Spring RA section of the OEA website, and they will be emailed to all delegates. A limited number of copies will be available on the day of the RA.

2. Constitution/Bylaws: If an item is designated as Constitution and/or Bylaws, it cannot be acted on at this Assembly. You must have it read by title at the end of this Assembly; it will be voted on at the following Assembly. To do this, you need a petition (available at the Referral Table or for download on the OEA website) with the signatures of at least 50 delegates. This petition should then be given to the chairperson of the Constitution and Bylaws Committee located at the Referral Committee table.

NEW BUSINESS FORM*

Committee Use Only: Item # _____		
_____ Chp./C & B	_____ Leg.	_____ Res.
_____ Retired	_____ Staff Liaison	_____ AED B.S.

TITLE OF NEW BUSINESS: _____

Ongoing Activity One Time Action

Budget Adjustment INCREASE DECREASE

I. Statement of New Business Item:

II. Rationale: (In paragraph form state the reason(s) for the New Business Item and what is to occur as a result of it.)

III. Supplemental Information:

Staff Hours Needed _____ Projected Time for Accomplishment _____

Cost of Implementation _____ Budget Line Item _____

Submitted by: _____ (Name) _____ (Local)

_____ (Cell Phone)

Seconded by: _____ (Name) _____ (Local)

_____ (Cell Phone)

***DEFINITION OF NEW BUSINESS ITEM:** An item of new business is specific in nature and terminal in application. It requires action as soon as possible and carries with it fiscal implication. A new business item adopted by the Representative Assembly shall remain in effect (1) until a specified expiration date, or (2) until it is implemented, or (3) until it is rescinded by a subsequent Representative Assembly.

GUIDELINES: A new business item must be submitted to the Referral Committee by the deadline. If you are submitting via mail (OEA, ATTN: Referral Committee, 225 E. Broad Street, Columbus, OH 43215) or via webform (available on the OEA website - <https://www.ohea.org/Spring-RA/>), **it must be received by 5:00 p.m. on Wednesday, May 8.** The Referral Committee will receive all new business items. If clarification of a new business item seems necessary, the Referral Committee can make such changes. If several new business items are received which are related, the Referral Committee may call these persons back to attempt to synthesize the new business items into a common item whenever possible.

RESOLUTIONS FORM*

Committee Use Only: Item # _____		
_____ Chp./C & B	_____ Leg.	_____ Res.
_____ Retired	_____ Staff Liaison	_____ Res. Liaison

TITLE OF RESOLUTION: _____

I. Statement of Resolution:

II. Rationale: (In paragraph form state the reason(s) for the Resolution and what is to occur as a result of it.)

Submitted by: _____ (Name) _____ (Local)

(Cell Phone)

Seconded by: _____ (Name) _____ (Local)

(Cell Phone)

***DEFINITION OF RESOLUTION:** A Resolution is a belief or position of the Association, adopted by the Delegate Assembly, providing direction in which the Association should be moving.

GUIDELINES: All Resolutions Report amendments must be submitted to the Referral Committee by the established deadline. If you are submitting via mail (OEA, ATTN: Referral Committee, 225 E. Broad Street, Columbus, OH 43215) or via webform (available on the OEA website - <https://www.ohea.org/Spring-RA/>), **it must be received by 5:00 p.m. on Wednesday, May 8.**

STANDING RULES AMENDMENT FORM*

Committee Use Only: Item # _____		
_____	_____	_____
Chp./C & B	Leg.	Res.
_____	_____	_____
Retired	Staff Liaison	Res. Liaison

What type of change are you recommending?

- _____ Addition
- _____ Change
- _____ Deletion

Standing Rules Section Number: _____

Note all changes by CAPITALIZING all additions; ~~STRIKING THROUGH~~ all changes or deletions.

Insert language below:

Submitted by: _____ (Name) _____ (Local)

_____ (Cell Phone)

Seconded by: _____ (Name) _____ (Local)

_____ (Cell Phone)

GUIDELINES: All Standing Rules amendments must be submitted to the Referral Committee by the established deadline. If you are submitting via mail (OEA, ATTN: Referral Committee, 225 E. Broad Street, Columbus, OH 43215) or via webform (available on the OEA website - <https://www.ohea.org/Spring-RA/>), **it must be received by 5:00 p.m. on Wednesday, May 8.**

OEA REPRESENTATIVE ASSEMBLY – SPRING 2024

REPRESENTATIVE ASSEMBLY MICROPHONE USAGE

A network of microphones and color-coded cards provide a system of communication between the delegates and the presiding officer, enabling the delegates to participate directly in the Association's business.

Procedures – A system of three (3) microphones are strategically placed on the floor of the Representative Assembly. A member of the Convention Planning Committee (CPC) and color-coded cards will be stationed at each microphone.

As the business of the Association is conducted, delegates wishing to speak must go to a microphone and inform the CPC member of their desire to speak. The CPC member will ensure the delegate has the correct color-coded card. Delegates should stay in line with their card until they are recognized by the Chair.

Motions and discussion by the Representative Assembly on specific items of business (e.g., New Business Items, Legislative Amendments, Resolutions Amendments, etc.) will be accepted once the agenda item has been officially introduced by the Chair.

As delegates line up at microphones to obtain the floor, the OEA RA Parliamentarian will arrange the speakers in order of precedence and present them to the presiding officer who in turn will acknowledge the delegates who desire to speak to the Representative Assembly. Upon recognition by the Chair, a delegate must state their name, unit of representation, and purpose for speaking.

RAISE A QUESTION OF PRIVILEGE/POINT OF PERSONAL PRIVILEGE

To help expedite the business of the Association, delegates who wish to raise a question of privilege/make a point of personal privilege, should complete a blue Question of Privilege/Point of Personal Privilege card (*sample pictured below*). Blank cards are available from the Referral Committee Table or a Floor Assistant. Completed cards that have been submitted will be addressed by the presiding officer in the order they were received before the assembly adjourns for the day. Individuals should stay near the microphone from which they wish to speak. ***(Please leave your completed card at the Referral Committee Table for delivery to the presiding officer.)***

Raise a Question of Privilege/Point of Personal Privilege	
Date _____	Time _____
Microphone # _____	Name _____
Unit of Representation _____	

OEA REPRESENTATIVE ASSEMBLY – SPRING 2024

OEA STATEWIDE CANDIDATES

OEA Secretary Treasurer

Robert McFee, Willoughby-Eastlake T.A.

NEA Director #5

Sharron Callahan, Cardinal E.A.

NEA Director #6

Linna Jordan, Hilliard E.A.

OEA Board of Directors At-Large #2

Cassandra Daniels, Columbus E.A.

OEA Board of Directors ESP At-Large #2

George R. Hoover, Barnesville ACE

VOTING INFORMATION

Secret-ballot voting for Constitution & Bylaws amendments will be conducted electronically. Delegates will use their own device (i.e., tablet, laptop, or smart phone) to cast their ballot. When voting is announced by the Chair, delegates will have 90 minutes to vote using a link that will be sent to delegates via email. A limited number of voting stations will be provided in Room A110 for delegates to use as needed.

STATEWIDE OFFICE DECLARATION OF CANDIDACY – SPRING 2025

For statewide offices scheduled for election at the 2025 Spring RA, all candidates must complete the Declaration of Candidacy form by February 24, 2025. Forms must be submitted to the Secretary-Treasurer's office before announcing candidacy (oeara@ohea.org). Please refer to additional rules and information included in the Declaration of Candidacy form provided and the RA Standing Rules.

MAY 10 PROFESSIONAL DEVELOPMENT SESSIONS FOR OEA MEMBERS

OEA is offering three different professional development opportunities to OEA members on the afternoon of Friday, May 10, from 3:00-5:00 p.m., at the Hyatt Regency Hotel and Convention Center. You must register in advance to attend one of the offerings listed below. You can register online through the registration links included in delegate emails you receive from OEA. Be sure to register early before sessions fill up!

Session 1 – Ensuring Safe, Just, and Welcoming Schools

Session 2 – Local Presidents and Treasurers Briefing

(this session is only available to Local Presidents, Treasurers or Designees)

Session 3 – Member Roundtable Discussions

(will include ESP specific breakout)

DECLARATION OF CANDIDACY

OEA STATEWIDE OFFICES AND OEA BOARD OF DIRECTORS

PLEASE NOTE: Terms of office for OEA President, OEA Vice President, OEA Board of Directors At-Large #3, OEA Board of Directors ESP At-Large #3, and Electoral Unit positions begin July 15, 2025 and end July 14, 2028. Terms of office for NEA Directors #3 and #4 begin September 1, 2025 and end August 31, 2028. This form may be used to nominate another member to any of the offices listed below. All candidates must have been an active member of the association for at least two (2) years immediately preceding the election. Nominations for elected officers shall be by declaration of candidacy and submitted in the following manner: 1. To the Secretary-Treasurer at least seventy-five (75) days prior to the election, 2. By the Nominations Committee at least forty-five (45) days prior to the election, or 3. If there are no declared statewide candidates for a position, by nomination from the floor of the OEA Representative Assembly; or the appropriate district representative assembly for electoral unit candidates.

NAME AS IT APPEARS IN THE OEA MEMBER DATABASE: _____

NAME AS YOU WOULD LIKE IT TO APPEAR ON THE BALLOT: _____

MAILING ADDRESS: _____
Street City State Zip

LOCAL ASSOCIATION: _____

COUNTY: _____ INDIV. ID # - OEA MEMBERSHIP CARD: _____

HOME TELEPHONE: _____ SCHOOL TELEPHONE: _____

E-MAIL: _____ SIGNATURE: X _____

I hereby nominate **myself** () **another member** () to be a candidate for the office of:

- OEA President (NEA Director 1st Alternate) – 3-year term ending 7/14/28
- OEA Vice President (NEA Director 2nd Alternate) – 3-year term ending 7/14/28
- NEA Director #3 (NEA RA Delegate Ex-Officio) – 3-year term ending 8/31/28
- NEA Director #4 (NEA RA Delegate Ex-Officio) – 3-year term ending 8/31/28
- OEA Board of Directors Member At-Large #3 (NEA Director Alternate) – 3-year term ending 7/14/28
- OEA Board of Directors Member – ESP At-Large #3 – 3-year term ending 7/14/28
- OEA Board of Directors Member – Electoral Unit # _____ – 3-year term ending 7/14/28

DEADLINES FOR RECEIPT OF DECLARATION OF CANDIDACY FORMS

<u>January 16, 2025:</u>	Central-3, Central-6, EOEA-1, NEOEA-2, NEOEA-5, NEOEA-8, SWOEA-2, SWOEA-3,
<u>January 20, 2025:</u>	ECOEA-3
<u>January 30, 2025:</u>	SEOEA-2
<u>January 31, 2025:</u>	WEOA-2, WEOA-3
<u>February 8, 2025:</u>	NWEOA-2
<u>February 24, 2025:</u>	OEA President, OEA Vice President, NEA Director #3, NEA Director #4, and OEA Board of Directors Member At-Large #3, OEA Board ESP At-Large #3 (<i>Statewide candidates have the option of including a bio/platform statement and a photo in the Ohio Schools Magazine (no more than 200 words) – must submit no later than February 10, 2025</i>)

PLEASE RETURN FORM TO: Elections & Conference Coordinator, OEA Executive Offices, 225 E. Broad St. 2550, Columbus, OH 43215. You may also submit via email to oeaara@ohea.org. A confirmation of this filing will be sent upon receipt of your form at OEA headquarters. Contact OEA Executive Offices at 1-800-282-1500, ext. 3199, **PRIOR** to the **filing deadline** if you have not received a confirmation.

OEA REPRESENTATIVE ASSEMBLY – SPRING 2024

PROPOSED AMENDMENTS TO THE OEA AMENDED AND RESTATED CONSTITUTION AND BYLAWS

PROPOSAL 1:

Proposal 1 to Amend Article V, Section 10 of the Ohio Education Association (OEA) Constitution would eliminate outdated language on board “Action Without Meeting” and replace it with new language that will allow the Board to address matters that arise immediately before (preliminary) or after (postliminary) a meeting or event. To facilitate this, the Board can poll its members using telephone, email, or text message. [Requires a $\frac{3}{4}$ vote for passage.]

Rationale and Background

The modernization of OEA’s decision-making process is crucial to ensure timely and efficient responses in today’s fast-paced environment. The previous language in the constitution limited the Board’s ability to make decisions outside of formal meetings. However, there are instances where swift action is required, either before or after a scheduled meeting or event. By allowing the Board to poll its members through various communication methods, the OEA ensures that decisions can be made promptly without compromising the integrity of the decision-making process. The proposed changes are not designed to bypass the traditional decision-making structure but rather to enhance the Board’s ability to respond to time-sensitive issues that specifically relate to upcoming or recently concluded meetings or events. By clearly defining the scope of this amendment to only matters that are preliminary or postliminary, the OEA ensures that the essence of regular board meetings remains intact and that the power remains balanced. This amendment is a testament to the OEA’s commitment to efficiency while preserving the democratic principles of the organization. The inclusion of quorum requirements further underscores the association’s dedication to maintaining transparency and fairness in all its operations.

CONSTITUTION ARTICLE V BOARD OF DIRECTORS

Section 10. Action Without Meeting. ~~Any action which may be authorized or taken at a Board of Directors’ meeting may be authorized or taken without a meeting in a writing or writings signed by all of the members who would be entitled to notice of a meeting of the Board of Directors held for such a purpose.~~ **IN CIRCUMSTANCES WHERE TIME IS OF THE ESSENCE, THE BOARD OF DIRECTORS MAY ALSO TAKE OFFICIAL ACTION UPON PRIOR AUTHORITY OF THE PRESIDENT, WITH APPROVAL BY THE VICE-**

PRESIDENT AND SECRETARY-TREASURER, BY CAUSING THE ENTIRE BOARD OF DIRECTORS TO BE POLLED BY TELEPHONE, TEXT MESSAGE, AND/OR E-MAIL. IN CONDUCTING THE POLL, THE OFFICERS SHALL AGREE UPON A COMMON STATEMENT TO BE READ AND/OR SENT TO EACH BOARD MEMBER, WHICH SHALL INCLUDE THE TIME WHEN THE POLLING PERIOD ENDS. THE RESULTS OF THE POLL SHALL BE THE DECISION OF THE BOARD OF DIRECTORS AND SHALL BE RECORDED. IN ORDER FOR AN ACTION TO PASS, IT MUST MEET THE QUORUM REQUIREMENTS SPECIFIED IN ARTICLE V, SECTION 8.

PROPOSAL 2:

To amend Section 8-3(b)(c) of the OEA Bylaws to replace the specific names of recognized caucuses with a general reference to "each recognized OEA caucus."
[Requires a majority vote for passage.]

Rationale and Background

The proposed amendment to Section 8-3(b)(c) of the OEA Bylaws is a practical update aimed at simplifying our governance documents. By changing the reference from specific named caucuses to a general term, "each recognized OEA caucus," we are making our bylaws more adaptable and easier to manage. This change allows for the inclusion of new caucuses or adjustments to existing ones without the need for constant updates to the bylaws. It is a straightforward, efficient solution that keeps our governance current and responsive to the evolving needs of our members, without altering the fundamental role or representation of the caucuses within the OEA.

**BYLAWS SECTION 8-3
COMMITTEES**

8-3. Committees.

- a. Member committees shall include Standing Committees, Special Standing Committees, and Ad Hoc Committees.
 - (1) The Standing Committees shall be: the Legislative Committee, the Resolutions Committee, the Convention Planning Committee, the Collective Bargaining and Member Advocacy Committee, the Professional Efficacy Committee, the Organizing Strategy Committee, the Local Development and Training Committee, and the Human and Civil Rights Committee.

(2) The Special Standing Committees shall be: the Audit Committee, the Reapportionment Committee, and the Nominations Committee.

b. Committee members shall be appointed for each Standing Committee by the President from a slate of recommended names presented by the governing body of each District Association submitted on or before May first (1st) annually, at the ratio of 1 per 8,000 members, or major fraction thereof, of each District.

(1) By May first (1st) of each year, the Advisory Councils of the Division of Higher Education, Division of OEA Retired, the OEA Aspiring Educator Division, ~~the Executive Board of the Doris L. Allen Minority Caucus~~, the Executive Committee of the State Council of Professional Educators, ~~the Executive Committee of the Women's Caucus, the Executive Committee of the Gay, Lesbian, Bisexual, and Transgendered Caucus, the Chairperson of the BAT Caucus, the Chairperson of the Hispanic Caucus, the Chairperson of the Rural Caucus, the Chairperson of the Education Support Professionals Department, and the Chairperson of the Developmental Disabilities (DD) Department,~~ **AND THE CHAIRPERSON OR DESIGNEE OF EACH RECOGNIZED OEA CAUCUS** shall submit a slate of recommended names of members for consideration by the OEA President.

(2) The Board of Directors shall also cause the availability of any open committee positions to be published in appropriate OEA communications, which are accessible to the membership of the affected constituency.

c. Each committee shall be composed of:

(1) At least one (1) member of each District Association for a term of three (3) years.

(2) One (1) member from the Division of Higher Education for a term of three (3) years.

(3) One (1) member from the Division of OEA Retired for a term of three (3) years.

(4) One (1) member from the OEA Aspiring Educator Division for a term of one (1) year.

~~(5) One (1) member from the Doris L. Allen Minority Caucus for a term of three (3) years.~~

~~(6) One (1) member from the Women's Caucus for a term of three (3) years.~~

(75) One (1) member from the State Council of Professional Educators for a term of three (3) years.

(86) One (1) Education Support Professional Department member for a term of three (3) years.

(97) One (1) Developmental Disabilities (DD) Department Member for a term of three (3) years.

~~(10) One (1) member from the Gay, Lesbian, Bisexual, and Transgendered Caucus for a term of three (3) years.~~

~~———— (11) One (1) member from the BAT Caucus for a term of three (3) years.~~

~~———— (12) One (1) member from the Hispanic Caucus for a term of three (3) years.~~

~~———— (13) One (1) member from the Rural Caucus for a term of three (3) years.~~

(8) ONE (1) MEMBER FROM EACH RECOGNIZED OEA CAUCUS FOR A TERM OF THREE (3) YEARS.

PROPOSAL 3:

To Amend OEA Constitution Article VI, Section 2, to update qualifications for elected officers to include full-time service to the OEA as fulfilling the requirement of being actively engaged in the education profession in Ohio.

To Amend Bylaw 2-1(c) to clarify the definition of "actively engaged in the education profession" within the Constitution to include serving in a full-time elected position within the OEA.

These proposed amendments are related and therefore must either pass or fail together. Since they amend both the Constitution and Bylaws, the higher voting threshold is applied for passage of both amendments. [Requires a $\frac{3}{4}$ vote for passage.]

Rationale and Background

These proposed amendments to the Constitution and Bylaws ensure that full-time executive officers of the OEA are recognized as active members, fulfilling the requirement of being actively employed and engaged in the education profession in Ohio. The proposed changes reflect the significant role that the executive officers play in our Association and broader educational community. The proposed amendments address the need for our governance documents to adapt to the realities of union leadership and the potential for external challenges to Union Leave or Teacher Professional Organization (TPO) agreements. Bylaw 2-1(c) has also been reformatted from the way it appears in the current bylaws.

CONSTITUTION ARTICLE VI OFFICERS

Section 2. Qualifications for Officers: All elected officers shall have been active members of the Association for at least two (2) years immediately preceding the election and shall be actively engaged in the education profession in Ohio. **MEMBERS SERVING AS EXECUTIVE OFFICERS OF THE ASSOCIATION IN A FULL-TIME ELECTED CAPACITY SHALL RETAIN THEIR ACTIVE MEMBERSHIP STATUS FOR THE DURATION OF THEIR TERM IN ACCORDANCE WITH BYLAW 2-1.**

BYLAWS SECTION 2-1 CLASSIFICATIONS

2-1. Classifications.

- a. There shall be seven (7) classifications of membership in the Association: Active, Staff, Aspiring Educators, Retired, Life, Corporate, and Associate. Any member of an affiliated local Association shall be eligible for a classification of membership in accordance with these Bylaws.
- b. Membership is limited to any person who supports the principles and goals of the Association.
- c. Active membership shall be open to any person:
 - (i) Who is employed by or in a public school district, public or private college or university, or other public institution devoted primarily to education, regardless of the specific nature of the functions that the person performs at the work site and regardless of who actually employs the person;
 - (ii) Who is employed by a public sector employer other than a school district, college or university, or other institution devoted primarily to education but who is employed primarily to perform educational functions;
 - (iii) Who is on limited leave of absence from the employment described in items (i) and (ii) above; or
 - (iv) Who is serving as an executive officer of the Association, who is an active member of a local affiliated association, where eligible for membership in a local affiliated Association, and who is not eligible for any other classification of membership as defined herein. The Association shall continue to allow active membership to those active members (i) who have been laid off due to a reduction in force for as long as such persons are eligible to be recalled, or for three (3) years, whichever is longer; or (ii) who have been discharged for as long as a legal challenge to such discharge is pending, who agrees to adhere to the **Code of Ethics of the Education Profession**, and who maintains membership in local and district affiliates and the NEA where

eligible, and who is not eligible for any other classification of membership as defined herein; **OR**

(V) WHO SERVES AS AN EXECUTIVE OFFICER OF THE ASSOCIATION IN A FULL-TIME ELECTED CAPACITY, AND WHO IS NOT ELIGIBLE FOR ANY OTHER CLASSIFICATION OF MEMBERSHIP AS DEFINED HEREIN. SUCH SERVICE SHALL BE CONSIDERED AS BEING ACTIVELY EMPLOYED AND ENGAGED IN THE EDUCATION PROFESSION FOR THE PURPOSES OF MAINTAINING ACTIVE MEMBERSHIP STATUS.

- d. Staff membership shall be open to any person employed by the Association or any of its affiliates in a professional staff position.
- e. Aspiring Educator membership shall be open to any student, undergraduate or graduate, enrolled in a teacher-education program in an accredited college or university in the State of Ohio. Such member shall not currently hold nor previously have held an employment contract with any educational institution, which would qualify the member for an active membership.
- f. Retired membership shall be open to any officially retired person who has held active membership in the Association for at least one (1) year and who has retired through a State Retirement System in Ohio. Retired life memberships shall be available to retired members and shall entitle the member for life to those rights and privileges of a retired member as the latter may, from time to time, be determined by the OEA Constitution and Bylaws. Retired life memberships shall also be available to active members and shall, upon retirement, entitle the member for life to those rights and privileges of a retired member as the latter may, from time to time, be determined by the OEA Constitution and Bylaws. Retired membership provides no entitlement to the rights, privileges, or benefits of active membership class. Further, a retired member who becomes employed by or in a public school district, public or private college or university, or other public institution devoted primarily to education, if eligible, must seek active membership in the OEA. The member will be placed in the proper membership class as outlined in Bylaw 2-1 with full membership rights and will be assessed the appropriate dues for that membership class regardless of eligibility for retired membership status pursuant to Bylaw 2-1.
- g. Life membership shall be open to a person who has purchased for life, those rights and privileges of an active member as the latter may, from time to time, be determined by the OEA Constitution and Bylaws. Effective September 1, 1977, the privilege of newly enrolling as a Life member of the Association is withdrawn.
- h. Any corporation, which supports the goals and principles of the Association, shall be eligible for corporate membership upon the approval of the Board of Directors.

- i. Associate membership shall be open to any person who is interested in advancing the cause of public education but who is not employed by an educational institution, agency, or organization and who is not eligible for any other classification of membership in the Association.
- j. A member may appeal the assigned classification of membership.

PROPOSAL 4:

To amend Article X, Section 2(d) of the OEA Constitution to change the voting requirement for constitutional amendments from a three-fourths (3/4) vote to a two-thirds (2/3) vote of delegates at the Representative Assembly. [Requires a $\frac{3}{4}$ vote for passage.]

Rationale and Background

The proposed change aims to align the Ohio Education Association's (OEA) voting requirements for constitutional amendments with those of the National Education Association (NEA) and to reflect the heightened voting requirements found in Robert's Rules of Order, Newly Revised. This adjustment is intended to facilitate a more streamlined and efficient process for adopting necessary amendments, while still ensuring that a significant majority supports such changes. Making the OEA voting requirement consistent with the NEA's constitution underscores our commitment to unity and coherence within the broader educational community. Additionally, aligning with recognized standards for parliamentary procedure enhances the legitimacy and democratic nature of our decision-making processes.

CONSTITUTION ARTICLE X AMENDMENT TO THE CONSTITUTION AND BYLAWS

Section 2. Amendment to the Constitution

- a. A proposed amendment to the Constitution shall be presented in writing to the Constitution and Bylaws Committee of the Board of Directors and read by title to the Representative Assembly. Such amendment shall then be voted on at the following Representative Assembly, provided that the other requirements of this section have been met.
- b. The text of the proposed amendment shall be printed in an official publication sent to all members at least thirty (30) days prior to its consideration.
- c. A proposed amendment to the Constitution may be debated, refined, and/or amended by the delegates at the Representative Assembly succeeding the Representative Assembly at which it was presented.

- d. This Constitution may then be amended by ~~three-fourths (3/4)~~ **TWO-THIRDS (2/3)** vote of the delegates present and voting at the Representative Assembly.

**OEA BOARD OF DIRECTORS VOTE
ON PROPOSED AMENDMENTS
March 16, 2024**

<u>Item</u>	<u>Position</u>	<u>Vote</u>
Proposal 1	Support	46 yes votes; 0 no votes; 0 abstentions
Proposal 2	Support	47 yes votes; 0 no votes; 0 abstentions
Proposal 3	Support	48 yes votes; 0 no votes; 0 abstentions
Proposal 4	Support	48 yes votes; 0 no votes; 0 abstentions

OHIO EDUCATION ASSOCIATION

RESOLUTIONS REPORT SUMMARY 2024-2025

**As Proposed at the Spring 2024
Representative Assembly**

Page #	Resolution	Summary of Change	Note/Follow Up
70	C-20 Physical Environment for Education The Association <u>ALSO</u> believes that educational employees should also be made aware of the location of hazardous materials within their worksites. With the involvement of local education associations, governing boards should implement appropriate programs to protect educational employees and students from such materials.	Formatting change.
76	C-34 Reduced Illegal Youth Gang Activity	The Ohio Education Association recognizes that the influence of youth gangs on educational environments and practices is not solely an urban problem. It therefore calls upon its members and affiliates to take pro-active measures to eliminate gang related problems in their school districts. The Association supports education programs that promote positive self-image and academic success, such as dropout prevention/intervention, before- and after-school programs, <u>COLLEGE AND CAREER READINESS PROGRAMS</u> , and job training, particularly for at-risk students in areas where there is a high degree of gang activity.	Included higher education.
86	D-13	<u>D-13 A FULLY-QUALIFIED EMPLOYEE IN EVERY SCHOOL SUPPORT POSITION HIGHLY QUALIFIED EDUCATION SUPPORT PROFESSIONAL IN EVERY SCHOOL</u>	Change in title
106	F-4 Grievance Procedures	The Ohio Education Association believes that grievance procedures shall be provided in the master contract with definite steps for appealing the application or interpretation of the contract. <u>THE ASSOCIATION ALSO BELIEVES THAT GRIEVANCE TIMELINES SHOULD BE ESTABLISHED AND FOLLOWED ACCORDINGLY.</u> Binding arbitration shall be a part of the grievance procedure. The Association also <u>FURTHER</u> believes that governing boards and local affiliates should create a structure that is separate from the contractual grievance procedure to resolve conflicts concerning non-contractual matters.	Adds statement regarding following grievance timelines.
112	F-20 Parity	The Ohio Education Association believes that all educational employees who work in a civil service setting must be granted at least <u>MINIMUM</u> the same benefits granted to public educational employees through state statutes. (90-00 <u>24</u>)	Grammar.
114-115	F-23 Faculty Governance in Higher Education The Association further believes that faculty and staff, where appropriate, should participate in the selection and evaluation process and <u>AS WELL AS</u> determine the status of colleagues and administrators; especially appointments, reappointments, and tenure. The Association believes it is the primary responsibility of faculty and staff, where appropriate, to establish	Grammar.

		procedures relative to promotions, sabbaticals, and research support.	
116	F-28 Notification of Teaching Vacancies	The Ohio Education Association believes that the superintendent of schools in each school district must mail <u>SEND WRITTEN</u> notification of teaching vacancies no later than July 15 each year to the placement offices of all Ohio teacher training institutions accredited by the State Department of Education and the president of the recognized teacher organization for the district. The list shall name the unfilled positions on the professional staff as of July 10, of that year. (79-00 <u>24</u>)	Updated use of terms.
116	F- 29 PUPIL <u>STUDENT</u> PERSONNEL SERVICES /INTERN PROGRAMS	<p>The Ohio Education Association believes that pupil <u>STUDENT</u> personnel services/intern programs, including tutoring, counseling, social work, school nursing, dental hygiene, health, speech, psychological, and attendance services, must be increased and established where they do not exist.</p> <p>The Association also believes that pupil <u>STUDENT</u> personnel services/intern programs must be stressed at the preschool and elementary levels since behavioral and attitudinal patterns are established at an early age.</p> <p>The Association opposes the subcontracting of pupil <u>STUDENT</u> personnel services/intern programs to private organizations. (83-03 <u>24</u>)</p>	Updates language to current terms used in profession.
125	F-53 STUDENT S AND EDUCATIONAL EMPLOYEES WITH ACQUIRED IMMUNE DEFICIENCY SYNDROME	<p>The Ohio Education Association opposes any state mandated guidelines dealing with students and educational employees with AIDS. Every educational institution shall establish guidelines for dealing with the problems presented by students and educational employees who have or could transmit AIDS to other students or educational employees.</p> <p>The guidelines should be consistent with state health department guidelines or other appropriate health agency guidelines. These guidelines shall not violate individual, professional, or constitutional rights.</p> <p>The recognized employee organizations shall be involved in the development of these guidelines, and any dispute as to their meaning or application shall be subject to the appropriate grievance/ arbitration procedure. The guidelines shall be reviewed periodically, and revised as necessary to reflect new medical information regarding AIDS. (87-17)</p>	No longer needed due to medical advances and subject being covered elsewhere in document.
133	H-5 <u>COMPREHENSIVE</u> Health Care Policy	The Ohio Education Association believes that <u>ACCESS TO</u> affordable and comprehensive healthcare, including, <u>BUT NOT LIMITED TO</u> , prescription drug coverage, parental <u>AND ADOPTION</u> leave, preexisting conditions, <u>REPRODUCTIVE HEALTH CARE, GENDER-AFFIRMING CARE, EMERGENCY</u>	Clarify language to align with NEA Resolutions.

		<p><u>CARE</u>, and partner benefits is <u>A HUMAN RIGHT</u> the right of every resident. <u>HEALTH CARE SHOULD NOT BE DENIED ON THE GROUNDS OF RACE, COLOR, NATIONAL ORIGIN, POLITICAL BELIEFS, RELIGION, GENDER, SEXUAL ORIENTATION, GENDER IDENTITY, GENDER EXPRESSION, AGE, DISABILITY, SIZE, MARITAL STATUS, OR ECONOMIC CONDITION.</u></p>	
140	I-9 The Right To Organize	<p>The Ohio Education Association believes that all people have the right to organize in order to achieve an improvement of their living conditions through their own free and independent unions and organizations. The Association urges that this right be advocated where it is now abused or denied and strengthened where it is now secured.</p> <p>The Association also believes that shared core values among and between unions strengthens the middle class <u>LIVING CONDITIONS OF SOCIETY.</u></p> <p>The Association deplores <u>REJECTS</u> anti-union activities by business interests, school districts, <u>POLITICAL AND NON-POLITICAL ENTITIES</u>, and government agencies, including efforts that attempt to destroy and undermine labor unions and organizations. penalize members for union involvement, and deprive workers of their right to organize and bargain. <u>MEMBERS HAVE THE RIGHT TO BE INVOLVED, ORGANIZE, AND BARGAIN WITHOUT PENALTY.</u> The Association supports the rights of workers to unionize by signing cards <u>THROUGH CURRENT METHODS AND SUPPORTS LEGAL PROTECTIONS FOR THEM TO DO SO.</u> and the establishment of penalties for violating the rights of workers to unionize.</p>	Updates language to current terms used.
142	I-13 <u>JUSTICE AND LAW ENFORCEMENT</u>	<p><u>THE ASSOCIATION BELIEVES THAT LAW ENFORCEMENT MUST BE A TRUSTED RESOURCE FOR COMMUNICATION AND COOPERATION WITH OUR SCHOOLS AND COMMUNITIES.</u></p> <p><u>THE ASSOCIATION ALSO BELIEVES THAT LAW ENFORCEMENT MUST BUILD STRONG RAPPORT WITH THE COMMUNITY TO ADDRESS AND PREVENT THE PERPETUATION OF HISTORICAL INJUSTICES AND BETTER SERVE INDIVIDUALS WHO ARE DISABLED, NON-ENGLISH SPEAKERS, DEAF, HARD OF HEARING, UNDER THE INFLUENCE OF DRUGS, HOMELESS, AND VICTIMS OF VIOLENCE.</u></p> <p><u>THE ASSOCIATION ENCOURAGES THE CREATION OF REVIEW BOARDS TO MEDIATE ISSUES BETWEEN LAW ENFORCEMENT AND OUR COMMUNITIES AND DISCOURAGES THE FURTHER MILITARIZATION OF CIVILIAN LAW ENFORCEMENT. (24)</u></p>	Adds new section to focus on reducing the militarization of policing. (Renumbering thereafter.)

142	I-44 13 CONTROL OF DEADLY WEAPONS AND LOOK-ALIKES	<p><u>THE ASSOCIATION BELIEVES SCHOOL PERSONNEL SHOULD NOT CARRY WEAPONS IN SCHOOL SETTINGS.</u></p> <p><u>IF A SCHOOL DISTRICT CHOOSES TO ALLOW OR REQUIRE SCHOOL PERSONNEL TO CARRY DEADLY WEAPONS, THE ASSOCIATION RECOMMENDS THE DISTRICT ADOPT THE FOLLOWING TRAININGS:</u></p> <p><u>A. INITIAL EXTENSIVE TRAINING AND HANDLING TIME BEYOND THAT REQUIRED FOR OBTAINING A CONCEAL CARRY LICENSE.</u></p> <p><u>B. REGULAR REFRESHER TRAINING, INCLUDING RANGE TIME;</u></p> <p><u>C. SIMULATION-BASED TRAINING IN SITUATIONAL AWARENESS AND DE-ESCALATION.</u></p>	Adds belief that educators should not carry weapons in schools. Adds training recommendations for districts that already require such.
148	1-27 28 INSTITUTIONAL AND ORGANIZATIONAL DISCRIMINATION	<p>The Ohio Education Association believes that the fabric of our society is strengthened when the contributions of all its diverse members are encouraged and embraced. The Association recognizes that institutional and public policies and practices sometimes discriminate against some segments of the population. <u>CAN BE DISCRIMINATORY.</u></p> <p>The Association deplores <u>REJECTS</u> these social, institutional, and governmental actions and policies that engender discriminatory practices. The Association encourages its affiliates, in concert with community organizations, to educate the public to bring about an awareness of such policies and practices and to actively work to eliminate them.</p> <p>The Association urges its affiliates and members not presently holding membership in organizations that deny membership to certain segments of our society on a discriminatory basis when such denials are not related to the stated purposes of the organization, to discontinue any involvement with such organization. <u>DISTRICTS AND LOCALS TO AFFILIATE WITH ORGANIZATIONS THAT PROMOTE INCLUSIVE PRACTICES.</u></p> <p>The Association further urges its members to not participate in, provide programs to, or join organizations utilizing exclusionary membership <u>AND DISCRIMINATORY PRACTICES.</u></p> <p>The Association also urges its members now <u>CURRENTLY</u> holding membership in such organizations to work actively from within for the total elimination of such exclusionary clauses <u>AND DISCRIMINATORY PRACTICES.</u> (78-03 <u>24</u>)</p>	Changed to be more concise.

OHIO EDUCATION ASSOCIATION

REPRESENTATIVE ASSEMBLY

2024-26 PROPOSED STRATEGIC BUDGET

Representative Assembly
Columbus, Ohio

May 10-11, 2024

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OEA MISSION STATEMENT

"The OEA will lead the way for continuous improvement of public education while advocating for members and the learners they serve."

OEA Core Values

These principles guide our work and define our mission.

We believe in ...

Democracy

The foundation of a strong democracy is high quality public education, which is essential for an educated citizenry.

Collective Action

When we unite as one voice, we are strong advocates for learners and our profession.

Fairness

A high-quality education, accessible to all, promotes a fair and just society.

Inclusion

We respect and embrace the diversity of all communities.

Integrity

By holding ourselves to the highest standards, we promote good citizenship and maintain the public trust.

Professionalism

Professional judgment and expertise of educators are critical to student success. Educators deserve the status, compensation and respect due all professionals.

OEA Vision

The Ohio Education Association vision is to create an Ohio where every student has access to a high-quality public education and where all members are supported, valued, and respected.

OEA Strategic Priorities & Conditions of Success

The OEA has adopted a set of Strategic Goals which guide our organization in the pursuit of its mission.

These Strategic Goals are:

Priority 1: Build OEA and locals' capacity to be more relevant to members

1. Number and type of localized trainings facilitated in the field by OEA Staff and number of members attending
2. Number of members attending OEA events who have not previously attended
3. Number of locals utilizing Local Development Plans to develop and implement member engagement strategies
4. Number of locals utilizing OEA affiliate, organizing, and wellness grants to develop and implement member engagement strategies

Priority 2: Educate and organize members to build support for quality public education

1. Number of locals and members engaged in local and state elections (e.g., candidate forums, endorsements, GOTV activities, recruitment of candidates, campaign volunteerism)
2. Member engagement in e-activism, written and oral testimony on legislative issues, and other activities related to building support for quality public education
3. Member participation in the OEA Fund

Priority 3: Build OEA as a member resource for professional issues

1. Member utilization of OEA and NEA online training modules
2. Member participation in the VESI program

Priority 4: Educate and organize OEA and its members to advocate for racial, social, and economic justice.

1. Number of members attending district, OEA, and NEA trainings on racial, social, and economic justice
2. Number of collective bargaining agreements with protections language
3. Number and percentage of members of color that are members of the following groups:
 - o Board of Directors
 - o OEA Standing Committees
 - o Elected District Leaders
 - o Local Officers
 - o Building Representatives
 - o RA Delegates

INTRODUCTION

This Proposed Strategic Budget presented herein provides a summary budget proposal for the fiscal years beginning September 1, 2024, and ending August 31, 2026. The two-year budget process calls for the budget to be proposed for adoption every even-numbered year and to be revised and reconsidered at the Spring Representative Assembly in the odd-numbered years.

Accordingly, the 2024-2026 proposed budget is presented as a traditional line-item budget for each of the two years. The second year is an estimate of revenue and organizational priorities and will be adjusted prior to year two to reflect any changes in estimates. At the 2025 OEA Spring Representative Assembly, the adjusted second year of this two-year budget will be presented to the representative Assembly for consideration.

OEA's Biennial Proposed Strategic Budget was developed using the following guidelines:

- Member priorities as reflected in the OEA Strategic Priorities. The Priorities and their conditions of success are approved by the Board of Directors (BOD).
- OEA Officer input, as the representative voice for the Board of Directors. The Officers provided input into the budget and met with Management multiple times during the budget development.
- Collaboration among the Executive Director and the Management Team to ensure the proposed budget reflects the programs and activities necessary to accomplish the four strategic priorities as established by the Board of Directors (BOD).
- Sound fiscal practices maintained in calculating estimates for revenue and expenses, and consideration made of contract provisions, membership trends, potential for inflation, and historical expenses.
- Consideration of programs to ensure robust member engagement and support of the students they serve.

The Business Services and Administration Committee (BSA) was provided with the budget proposal for review and input prior to presenting it to the Board of Directors.

Revenue:

OEA is experiencing a small year over year reduction in membership. Based on this trend, membership is projected to decrease by 1% in each year of the budget.

Beginning in 2001 the dues included a delegate approved \$20 per member assessment fee. In 2021, this assessment was eliminated, reducing overall revenue. This reduction has now been fully offset with increased dues based on annual increases to the average teacher salary (ATS) since the fee was eliminated. The ATS for 2024-2025 increased 3.1%. The budget proposal includes an estimate of a 2.6% increase in ATS for the 2025-2026 fiscal year.

The interest and dividends on OEA investment reserves are budgeted as earnings and not losses for the proposed two-year budget. The estimate is based on historical trends and current market outlooks, however, there is no control over what happens in the economy. OEA's Investment Policy Statement is constructed of conservative investing principles which helps to reduce risk. There is no way to eliminate risk entirely and investments are subject to market variations due to changes in inflation, interest rates, national and global events, employment rates, advancements in technology, and many other factors.

Expenses:

Foundational

OEA's expenses are weighted heavily towards staff costs and facilities. Of the \$70 million expense budget, approximately \$50 million covers the expenses of payroll, benefits, training, facilities,

INTRODUCTION

office operations, accounting fees (audits, bank fees, payroll), computer systems, and travel (OEA Delegates, BOD, and staff).

Expenses for salary and benefits reflect the negotiated contracts currently in effect and estimates of bargaining results for contracts expiring during the budget period. OEA has increased the number of Associate staff since the prior budget to meet administrative needs as OEA increases efforts organization-wide to engage our members and locals. OEA has also added a Communications Director to prioritize lifting member voices.

HR continues to seek candidates from racially and socially diverse backgrounds and does pre-hire assessments to ensure a candidate matches the work and can thrive within the organization. The budget reflects increased expenses necessary to attract and retain an exceptionally talented, diverse, workforce for OEA, employees who support public education, support unions, and have the skillsets required to be successful.

Facilities, office, and equipment expenditures have increased reflecting ongoing maintenance to the OEA headquarters, routine computer replacements for employees, network security maintenance/upgrades, and postage increases. OEA's liability insurances have remained consistent with prior years, with decreases in cyber insurance due to appropriate and robust internal controls implemented, maintained, and managed by the Computer Services Department.

Purchased Services expenses include bank fees, RA event expenses, audit fees, and software contracts/support (Microsoft, 360, Zoom, etc.). There are also expenses that occur every few years for cyber audits, network recalibration, etc. Of this \$2 million plus budget, 60% is network and software systems related and 15% is banking, auditing, accounting, and payroll related. The other 25%, or approximately \$525,000, is used for public relations campaigns, *Ohio Schools*, member cadres, member organizing, and campaign (issues) related expenses.

These previous budget categories are the expenses necessary to provide a supportive infrastructure for staff and members to accomplish the priorities of OEA and to meet the demands of an emerging "work from anywhere/anytime" culture.

The remaining \$20 million of the expense budget is allocated to the programs and services that encompass Association and Member Promotion, Legal Services, Print and Social Media and Communications, Organizing, Lobbying and Political Action, and any required contingency reserves. These variable expenses specifically align with the strategic priorities of OEA.

The Legal Services budget of \$3.5 million is an investment in plan attorneys who provide representation to our members and assistance to our staff and training and systems to support the work.

The Member Advocacy Division budgeted expenses focus on the Public Education Matters Initiative, leadership development, and membership engagement around top member issues and legislative and political action. The budgetary proposal prioritizes investment in current and new programs that further organizational priorities. The budget reflects a thoughtful focus on programming and engagement based on feedback from members and staff, trends observed by Member Advocacy Managers in their respective departments, OEA's strategic priorities, and areas of success and potential growth. The budget also focuses on investment in staff in areas of professional development, accountability, and effective team building – all of which results in increased effectiveness in providing successful service to OEA members. See specific initiatives below which align to the strategic priorities.

INTRODUCTION

All Priorities – Public Education Matters Initiative (PEM) and Communications (\$2.4 million)

- This initiative focuses on the respect and dignity of educators and support staff, fighting for fully funded supports and resources, and strengthening the united voice of OEA members. Adopted by the delegates to the Spring 2023 RA, funding includes an annual PEM Solidarity Event, listening tours, focus groups, and other programming to further the initiative.

Priority 1 - Build OEA and locals' capacity to be more relevant to members (\$9.4 million)

- Local Development Plan and Local Assessment Tool – to *aggressively promote and dramatically increase* OEA local participation in Local Development Plans (LDPs) in concert with OEA's four (4) Strategic Priorities.
- Local Leader Training – includes funding for the Local Presidents Training Cadre and training focused on local leader development. The Presidents Cadre program includes experienced local presidents and staff dedicated to developing and providing training to local presidents with 0-3 years' experience. This cadre also regularly reviews the Local Presidents Manual which is a valuable resource for all local presidents.
- Crisis Intervention Response Team – program dedicated to supporting locals and members in crises situations (e.g., school shootings, tragic student staff loss of life, etc.).

Priority 2 - Educate and organize members to build support for quality public education (\$4.6 million)

- Member Legislative Advocacy Training Program - Certification programming for members as legislative advocates. Supports member involvement in the Ohio legislative process, building

relationships with legislators, tools for legislative accountability, and organizing local legislative campaigns.

Priority 3 - Build OEA as a member resource for professional issues

- Expanded Opportunities for Professional Learning - through an OEA tailored portal to NEA's LMS LearnUpon system. Expanded reporting on member engagement, additional funding for promotion of the LMS, and OEA course content development. Programmatic budget is minimal as there is no system expense to OEA, and staff will create content.

Priority 4 - Educate and Organize OEA and its members to advocate for racial, social, and economic justice (Included in \$1.8 comms budget, \$1.1 organizing, grants, training, and PEM)

- Community Outreach Initiative – Four (4) to five (5) identified urban locals, possibly heading into bargaining, to develop a listening tour and follow up to build community coalitions (e.g., NAACP, Diversity Center of Ohio, Neighborhood Watch, Religious leadership).
- Marketing and Partnership Initiatives - Statewide PEM Initiative campaign; solidifying and expanding diverse marketing sponsorships for the recruitment and retention of educators of color.
- Training offerings to staff and members intended to educate and strengthen awareness of and skills for addressing equity issues.

Priority 4 is an OEA foundational culture shift and is intentionally embedded in the work of all the priorities.

BUDGET PERFORMANCE

I want to thank the many people who have been involved in putting this budget together for a job well done -- especially the Business/Support/Administration Committee. The Committee members are:

Chairperson: Mark Hill, Worthington Education Association

Vice-Chairperson: Arthur Lard, Portsmouth City Teachers Association

Members: Cassandra Daniels, Columbus Education Association
Angela Dyer-Sanchez, Columbus Education Association
Paige Harding, Gahanna-Jefferson Education Association
Deborah Jackson-Princeton A.C.E.
Tammy LaPlante, Ashtabula Association of Classified School Employees
David Pryer, Allen East Education Association
Deloris Rome Hudson, Southwestern OEA Retired
Alice Sneed, Winton Woods Teacher Association

Staff: Patricia Collins Murdock, Executive Director
Kristy Spires, CFO and Assistant Executive Director - Business Services
Brandy Raabe, Controller



Mark Hill, OEA Secretary-Treasurer
March 1, 2024

BUDGET PERFORMANCE

**OHIO EDUCATION ASSOCIATION
BUDGET PERFORMANCE
2024-2026 BUDGET REQUEST**

	ACTUALS 2022-2023	APPROVED BUDGET 2022-2023	ADJUSTED BUDGET 2023-2024	REQUESTED BUDGET 2024-2025	REQUESTED BUDGET 2025-2026
<u>REVENUES</u>					
Memberships	50,320,112	49,653,435	50,756,985	52,562,599	53,424,681
Ohio Schools	432	26,191	10,650	2,400	2,400
Interest, Dividends & Gains	7,020,538	3,870,207	4,016,050	4,816,150	4,816,150
Building & Parking Rental	85,666	84,576	84,576	84,576	84,576
NEA Services and Subsidies	404,236	125,000	110,000	300,000	300,000
NEA Legal Services	1,202,590	1,229,376	1,229,376	1,218,709	1,218,709
Conference Registration Fees	17,114	26,000	26,000	15,000	15,000
Miscellaneous	89,350	45,675	45,675	50,050	50,050
UniServ Service Charge	7,024,063	6,949,224	7,107,235	7,350,702	7,488,129
NEA UniServ Funding	3,756,398	3,787,272	3,863,017	3,862,988	3,940,248
TOTAL REVENUES	69,920,498	65,796,956	67,249,564	70,263,174	71,339,943

BUDGET PERFORMANCE

	ACTUALS 2022-2023	APPROVED BUDGET 2022-2023	ADJUSTED BUDGET 2023-2024	REQUESTED BUDGET 2024-2025	REQUESTED BUDGET 2025-2026
<u>PERSONNEL SERVICE</u>					
Salaries Officers	559,371	559,371	574,137	591,795	607,187
Salaries Professional	17,318,511	17,411,483	18,072,735	19,297,675	20,102,250
Salaries Associate	3,630,067	3,959,863	4,080,931	4,353,093	4,611,877
Temporary Help	84,504	36,076	60,630	50,000	51,080
Overtime Associate	64,174	98,170	109,670	84,680	84,680
	21,656,626	22,064,963	22,898,103	24,377,243	25,457,074
<u>BENEFITS</u>					
Group Health and Life	5,754,645	6,407,925	6,170,517	6,401,272	6,854,841
Post-Retirement Health Care	1,005,646	1,060,915	1,082,454	1,158,206	1,163,531
Payroll Taxes	3,450,641	3,480,457	3,629,490	3,878,414	4,057,390
Defined Benefit Pension Plan	(874,228)	789,965	234,258	242,666	245,206
Defined Contribution Pension Plan	3,125,120	3,185,595	3,312,607	3,622,664	3,822,665
401K	632,973	627,279	650,228	687,848	719,416
	13,094,797	15,552,135	15,079,553	15,991,070	16,863,049
<u>PURCHASED SERVICES</u>					
Independent Contractors	852,729	1,015,575	1,003,321	1,605,369	1,627,904
Professional Services	75,970	92,300	148,260	148,260	148,260
Offsite Storage Fees	36,256	34,682	38,097	34,928	35,092
Other Purchased Services	782,548	1,111,763	1,184,705	1,301,958	1,504,543
	1,747,503	2,254,319	2,374,383	3,090,515	3,315,799
<u>PERSONNEL EXPENSES</u>					
Interview Expenses	0	4,000	10,000	10,000	10,000
Advertising	4,310	7,500	6,156	6,156	6,156
Relocation	0	5,000	8,000	8,000	8,000
Other Personnel Expenses	4,344	5,000	4,544	8,000	9,000
	8,654	21,500	28,700	32,156	33,156

BUDGET PERFORMANCE

	ACTUALS 2022-2023	APPROVED BUDGET 2022-2023	ADJUSTED BUDGET 2023-2024	REQUESTED BUDGET 2024-2025	REQUESTED BUDGET 2025-2026
<u>TRAVEL</u>					
Staff Travel Expense	229,254	239,119	277,505	377,786	382,676
AAA Membership	9,338	13,149	13,575	14,036	14,046
Mileage Reimbursement	48,902	60,470	69,147	100,047	103,048
Auto Allowance Option	1,483,379	1,555,000	1,512,000	1,540,800	1,540,800
Other Travel Related Expense	946,722	1,055,031	1,090,811	1,422,144	1,475,139
	<u>2,717,595</u>	<u>2,922,769</u>	<u>2,963,037</u>	<u>3,454,813</u>	<u>3,515,709</u>
<u>TRAINING & DEVELOPMENT</u>					
Registration	29,704	28,749	108,444	222,244	228,834
Training Travel	66,535	89,099	92,999	246,048	262,326
Training (Skill)	20,806	20,000	21,000	60,750	64,600
Tuition Reimbursement	1,270	5,000	3,000	3,000	3,000
Computer Training	0	1,000	500	0	0
Mentor Training	0	1,000	500	500	500
Other Training	34,564	106,200	106,200	150,950	152,526
	<u>152,878</u>	<u>251,048</u>	<u>332,643</u>	<u>683,492</u>	<u>711,786</u>
<u>ASSOCIATION/ MEMBERSHIP PROMOTION</u>					
Local Leader Training	735	36,029	36,029	3,125,191	126,769
Membership Awards	0	12,020	12,546	1,500	1,500
Organizing	342,082	507,154	502,191	1,480,697	1,592,144
Handbooks/Other Member Promotion	1,084,498	299,730	445,986	1,087,998	1,140,738
Service Awards	46,134	56,051	56,616	105,915	141,138
Pension System Campaigns	1,083	2,500	2,625	2,625	2,625
Professional Dues & Memberships	32,556	37,432	44,719	53,388	54,056
Other Association Promotion	576,851	537,411	556,611	977,637	1,195,685
	<u>2,083,939</u>	<u>1,488,327</u>	<u>1,657,323</u>	<u>6,834,951</u>	<u>4,254,655</u>

BUDGET PERFORMANCE

	ACTUALS 2022-2023	APPROVED BUDGET 2022-2023	ADJUSTED BUDGET 2023-2024	REQUESTED BUDGET 2024-2025	REQUESTED BUDGET 2025-2026
<u>BUILDING MAINTENANCE & OPERATION</u>					
Utilities	315,135	220,170	348,006	338,805	358,528
Property/Other Taxes	164,068	168,216	168,056	173,557	173,917
Building Repair & Remodeling	35,601	135,000	140,000	332,950	453,266
Building Management Expense	459,395	531,244	537,255	490,492	589,943
Property Insurance	257,518	238,249	321,710	297,683	297,803
Rent	371,585	454,720	467,370	534,273	546,700
	<u>1,603,302</u>	<u>1,747,599</u>	<u>1,982,396</u>	<u>2,167,760</u>	<u>2,420,157</u>
<u>OFFICE EXPENSE</u>					
Supplies	136,101	190,458	189,898	200,594	219,003
Purchased Publications	136,004	145,091	151,248	186,221	191,092
Printing & Mailing	38,049	20,254	25,000	40,000	42,500
Bindery Service & Purchased Printing	842,986	477,647	905,743	605,427	625,794
Telephone	58,790	141,221	159,988	127,342	127,742
Internet	289,641	252,795	276,840	177,807	177,807
Mobile Phone	159,365	204,952	209,295	341,663	343,063
Postage	531,549	302,678	326,973	420,618	443,996
	<u>2,192,485</u>	<u>1,735,095</u>	<u>2,244,986</u>	<u>2,099,672</u>	<u>2,170,997</u>
<u>EQUIPMENT</u>					
Equipment Repairs & Service	166,444	229,221	234,221	208,756	211,056
Capital Equipment	14,041	240,227	165,021	227,399	100,477
Equipment Rental	124,708	266,605	269,985	277,265	283,812
	<u>305,194</u>	<u>736,053</u>	<u>669,227</u>	<u>713,420</u>	<u>595,345</u>

BUDGET PERFORMANCE

	ACTUALS 2022-2023	APPROVED BUDGET 2022-2023	ADJUSTED BUDGET 2023-2024	REQUESTED BUDGET 2024-2025	REQUESTED BUDGET 2025-2026
<u>MEMBER TO MEMBER</u>					
Fundraising	27,046	80,958	95,958	95,958	95,958
Legislative Lobbying	134,655	21,985	97,385	188,660	189,060
Coalitions	1,815,000	1,815,500	1,860,500	1,910,500	1,910,500
Member Lobby Days	170	300	5,300	5,300	5,300
State Council	2,469	0	50,000	50,000	50,000
Member to Member	256,804	375,027	395,027	409,027	414,027
	2,236,144	2,293,771	2,504,170	2,659,445	2,664,845
<u>COMMUNICATIONS</u>					
Media	288,925	795,253	754,252	830,489	844,074
Surveys	215,400	268,492	277,000	324,000	325,500
Other Communications	1,545	11,000	11,000	26,250	27,250
	505,870	1,074,745	1,042,252	1,180,739	1,196,824
<u>OTHER EXPENSE</u>					
Bad Debt Expense	(4,258)	5,000	5,000	5,000	5,000
Depreciation Expense	750,815	859,667	827,418	756,577	698,043
Miscellaneous Expense	5,246	10,127	10,127	10,500	10,500
	751,803	874,794	842,545	772,077	713,543

BUDGET PERFORMANCE

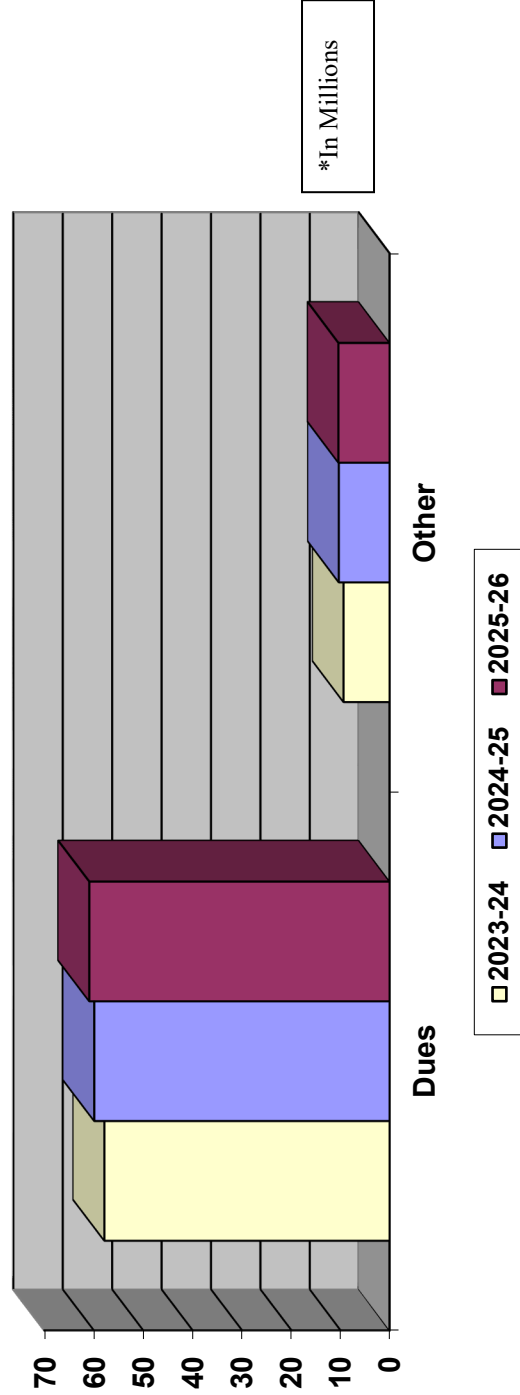
	ACTUALS 2022-2023	APPROVED BUDGET 2022-2023	ADJUSTED BUDGET 2023-2024	REQUESTED BUDGET 2024-2025	REQUESTED BUDGET 2025-2026
<u>LEGAL</u>					
Arbitrations	252,721	185,000	185,000	185,000	185,000
DLMS Plan Retainer	2,670,096	2,670,096	2,670,096	2,670,096	2,670,096
Fair Share Fee	0	3	3	0	0
Other Legal Expense	202,352	445,100	445,100	445,100	445,100
	3,125,168	3,300,199	3,300,199	3,300,196	3,300,196
<u>OEA-NEA ACTIVITIES</u>					
NEA Delegate Expense	223,655	287,061	296,793	296,793	325,570
Affiliation Fees	35,000	15,000	15,000	35,000	35,000
Prof Liability Insurance & Other Ins	55,003	67,278	67,278	71,569	72,397
Grant Expense	2,035,417	2,362,250	2,365,250	2,485,250	2,485,250
Scholarship Expense	11,000	17,000	15,000	15,000	15,000
Contingency	1,709,986	6,685,939	6,524,629	0	1,190,000
	4,070,061	9,434,528	9,283,950	2,903,612	4,123,217
Total Expenses	56,252,019	65,751,846	67,203,468	70,261,162	71,336,353
Increase (Decrease) in Unrestricted Net Assets	13,668,478	45,110	46,096	2,012	3,590

REVENUE

The OEA total budgeted income for fiscal year 2024-25 is \$70,263,174. That total represents an increase of 4.29% compared to the 2023-24 budget. The Ohio Department of Education has determined that the Average Teacher Salary has increased 3.1% for the 2024-25 school year. The UniServ Service Charge in both budget years includes the discontinuation of the additional \$20 fee passed by the Board of Directors in February 2001. OEA's dues for a fulltime educator for fiscal year 2024-25 will total \$594. The total dues increase for 2024-25 is \$17, comprised of a \$15 OEA dues increase and a \$2 increase in the UniServ service fee. OEA's due's structure is based on a millage formula for which 7.6 mills are generated based on the average teacher salary. The dues are prorated based on the type of member (full time, part time, school support personnel, etc.). The UniServ service fee is in lieu of UniServ charges previously paid by local associations and is based on 1.0 mil. The UniServ service fee is not prorated based on the type of membership. Other non-membership revenue for 2024-25 is budgeted to total \$10,349,873, a 9% increase from 2023-24.

The OEA total budgeted income for fiscal year 2025-26 is \$71,339,943. That total represents an increase of 1.5% compared to the 2024-25 budget. This is based on a conservative estimate of a 2.6% increase in the Average Teacher Salary for the 2025-26 school year. The total budgeted full-time educator dues change for 2025-26 is \$16. Other non-membership revenue for 2025-26 is budgeted to total \$10,427,133 a minimal increase year over year.

A detailed explanation of each category of income follows the graph and table.



REVENUE

	2022-23 Actuals	2023-24 Adjusted Budget	2024-25 Budget	2025-26 Budget
Membership Dues	\$57,344,175	\$57,864,220	\$59,913,301	\$60,912,810
NEA UniServ Funding	3,756,398	3,863,017	3,862,988	3,940,248
NEA Legal Services	1,202,590	1,229,376	1,218,709	1,218,709
NEA Services & Subsidies	404,236	110,000	300,000	300,000
Interest, Dividends & Gains	7,020,538	4,016,050	4,816,150	4,816,150
Building & Parking Rental	85,666	84,576	84,576	84,576
Ohio Schools	432	10,650	2,400	2,400
Conference Registration Fees	17,114	26,000	15,000	15,000
Miscellaneous	<u>89,350</u>	<u>45,675</u>	<u>50,050</u>	<u>50,050</u>
Total Revenue	<u>\$69,920,498</u>	<u>\$67,249,564</u>	<u>\$70,263,174</u>	<u>\$71,339,943</u>

Membership Dues

The total membership enrollment budgeted for fiscal year 2024-25 is reduced by 1% or 1,090 members from the December 31, 2023, actual membership counts which were used as a baseline for the projections. The projection is for a total membership enrollment of 114,904 members and full member equivalents (FMEs) of 100,119.

Membership Dues income for fiscal year 2025-26 is budgeted to increase \$999,509 compared to the 2024-25 proposed budget.

REVENUE

NEA UniServ Funding

NEA UniServ Funding for the 2024-25 budget is \$29 less than was budgeted in fiscal year 2023-24 and has a budgeted increase of \$77,260 in 2025-26. There is no change in units or per unit funding in 2024-25. In fiscal year 2025-26 the increase from the budget year 2024-25 is \$840 per unit increase.

This revenue represents the reimbursement NEA provides to state affiliates based upon the number of UniServ units the state has in place. Every year NEA determines a new funding rate for this reimbursement. In addition, the NEA criterion for defining a UniServ unit is different than the OEA criteria definition of a UniServ unit. OEA has budgeted the NEA funding to OEA based on 92 UniServ units in both budget years.

NEA Legal Services

NEA funding for the OEA/NEA Legal Services Program for budget year 2024-25 decreased \$10,667 to \$1,218,709 from the 2023-24 approved budget amount at \$1,229,376. The budget for 2025-26 remains the same as the 2024-25 budget. NEA reimburses OEA for approximately 50% of the qualified expenses for providing legal services to OEA members.

NEA Services and Subsidies

NEA Services and Subsidies revenue for budget years 2024-25 increased \$190,000 to \$300,000 from the 23-24 approved budget of \$110,000. The budget for 2025-26 remains the same as the 2024-25 budget. This revenue represents anticipated grants and subsidies that OEA receives from NEA for various programs and services. The funds expended for each grant are monitored to assure the specific program goals and objectives are being achieved.

Interest, Dividends & Gains

Interest, Dividends and Gains revenue for the proposed budget year 2024-25 is anticipated to increase by \$800,100 over the fiscal year 2023-24 budget due to a projected increase in investments and the resulting earnings from interest and dividends. The proposed budget for 2025-26 is expected to remain the same as the fiscal year 2024-25.

Building Rental

Building Rental revenue is anticipated to remain the same at \$84,576 in the fiscal year 2024-25 and 2025-26 budgets, compared to the 2023-24 budget. This revenue represents income received for the rental of office space in the OEA Headquarters building and the YEA rental of space in the Howland office.

REVENUE

Ohio Schools Advertising Revenue

OEA's magazine, *Ohio Schools*, generates revenue for OEA through the sale of advertising space. The 2024-25 budget was reduced by \$8,250 to \$2,400 over the fiscal year 2023-24 and will remain the same for 2025-26 budget. This is based on actual amounts received in previous years.

Conference Registration Fees

Conference Registration Fees revenue have been decreased in both the 2024-25 and 2025-26 budgets to \$15,000 to reflect the experience of actual fees received in previous years. Conference Registration Fees Income represents an estimate for registration fees charged for participation in conferences such as the OEA Summer Leadership Academy, Advocacy and Organizing Institute, Ohio New Educators (ONE) Conference, bargaining boot camps and various other conferences.

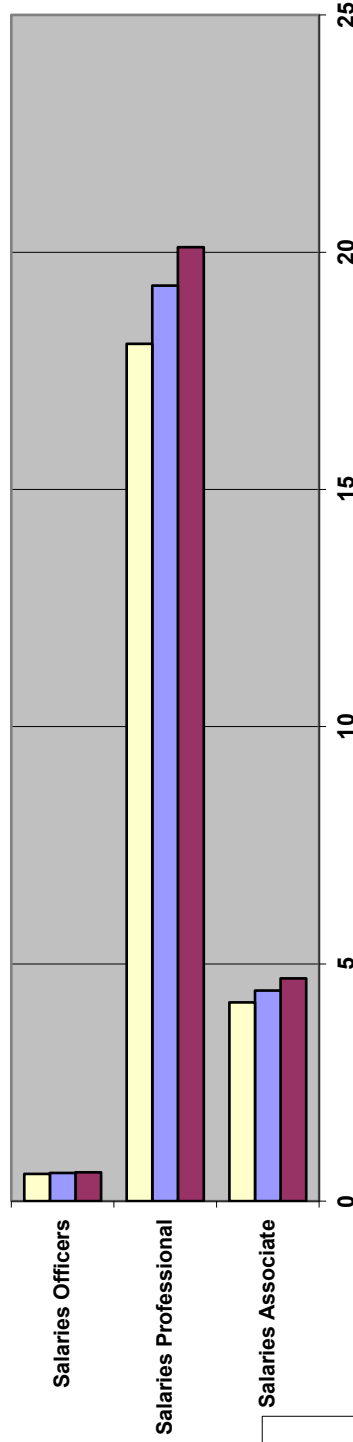
Miscellaneous

Miscellaneous income includes income from various sources. This account is budgeted to remain the same in both 2024-25 and 2025-26 at \$50,050. Miscellaneous income is very unpredictable, and the budget reflects actual amounts from recent years.

SALARY EXPENSE

Total salary expense budgeted for 2024-25 is \$24,377,243 which represents a 6% increase over the 2023-24 budget. This increase includes staff additions as well as scale increases. Total salary expense budgeted for 2025-26 is \$25,457,074 which represents a 4% increase over the proposed 2024-25 budget.

Salaries are the largest budgeted expense and represent approximately 35% of the total budget. Given that OEA is a service-based organization rather than a manufacturing or product-based organization, this percentage is not unusual. A detailed explanation of each category of salary and related benefit expense follows the graph and table.



■ 2023-24
■ 2024-25
■ 2025-26

*In Millions

	2022-23 Actuals	2023-24 Adjusted Budget	2024-25 Budget	2025-26 Budget
Salaries Officers	\$ 559,371	\$ 574,137	\$ 591,795	\$ 607,187
Salaries Professional	17,318,511	18,072,735	19,297,675	20,102,250
Salaries Associate	3,630,067	4,080,931	4,353,093	4,611,877
Temporary Help	84,504	60,630	50,000	51,080
Overtime	64,174	109,670	84,680	84,680
Total Salary Expense	\$21,656,626	\$22,898,103	\$24,377,243	\$25,457,074

SALARY EXPENSE

Salaries - Officers

The officers' salary expense increased for the budget year 2024-25 by \$17,658 over the 2023-24 approved budget, and the expense for the budget year 2025-26 has an increase of \$15,392. This is due to the formula calculation contained in the OEA Bylaws. Officers' salaries are determined using the Average Teacher Salary from the two preceding fiscal years multiplied by 2.6 for the President and 2.2 for the Vice President and Secretary-Treasurer. In addition, the officers receive a housing allowance.

Salaries - Professional

The professional salary expense for budget 2024-25 is \$1,224,940 more than the 2023-24 approved budget. The professional salary expense for budget year 2025-26 has been increased by \$804,575 over the 2024-25 proposed budget. This includes the salary expense for 104 professional union staff and 24 managers, including the Executive Director.

The salary schedule used to calculate the budget for expenditures for the managers includes an average overall increase of 3.5% to provide base and step increases for both budget years 2024-25 and 2025-26. For professional staff, a base salary increase of 2.5% is budgeted for 2024-25 and an increase of 3% is being projected for 2025-26. These expenditures also reflect progression on the salary schedule of 5.75% step increments for the eligible professional staff employees. 66 of 104 professional staff are estimated to be at the top of the salary schedule.

Salaries – Associate

The associate salary expense for fiscal year budget 2024-25 is approximately \$272,162 more than the 2023-24 approved budget. The associate salary expense for budget 2025-26 is increased by \$258,784 over the proposed budget for 2024-25. This includes the salary expense for 63 associate staff. The salary scales used in the 2024-25 and 2025-26 budget include a 3% increase on the base salary and reflect a 5.75% step increases on the salary schedule that are eligible. Approximately 24 of 63 associate staff are estimated to be at the top of the salary schedule.

Temporary Help

Temporary help expense for the proposed budget 2024-25 decreased \$10,630 compared to the 2023-24 approved budget. This expense is budgeted to increase \$ 1,080 in the 2025-26 proposed budget. This account reflects the recent actual use of temporary agency staff to fill in for vacancies due to turnover or staff illness.

Overtime

Overtime expense for budget year 2024-25 is \$24,990 less than the 2023-24 approved budget with no change being budgeted in year 2025-26. The amounts reflect recent actual experience. Overtime is only available for associate staff and is used primarily during peak times such as membership processing, the representative assemblies, OEA Advocacy & Organizing Institute, OEA Summer Leadership Academy, bargaining boot camps and various other conferences.

PENSION EXPENSE

Total pension expense for the 2024-25 budget is \$3,865,330. The 2024-25 budget represents an increase from the 2023-24 budget expense of \$318,465. Defined benefit plan expenses are primarily for the Pension Benefit Guaranty Corporation (PBGC) premiums that OEA is required to pay. The defined benefit liabilities remain tied to interest rates along with market performance and can be highly unpredictable year over year. Total pension expense for the 2025-26 budget is \$4,067,871 representing a 5% increase from 2024-25. Professional staff and managers hired before May 15, 1992, are entitled to retire after 20 years of service and receive a defined benefit pension of up to 64% of the five-year final average salary. Professional staff and managers hired after May 15, 1992, are part of a 32-year defined benefit pension plan. Eligible employees may retire after 32 years with full pension. However, employees who serve less than 32 years will receive an actuarially reduced benefit based on actual years of service. As a result of the staff contracts negotiated in 2000, professional staff hired on or after September 1, 2000, are covered by a defined contribution pension plan to which the employer is obligated to contribute 20% of an employee's yearly compensation.

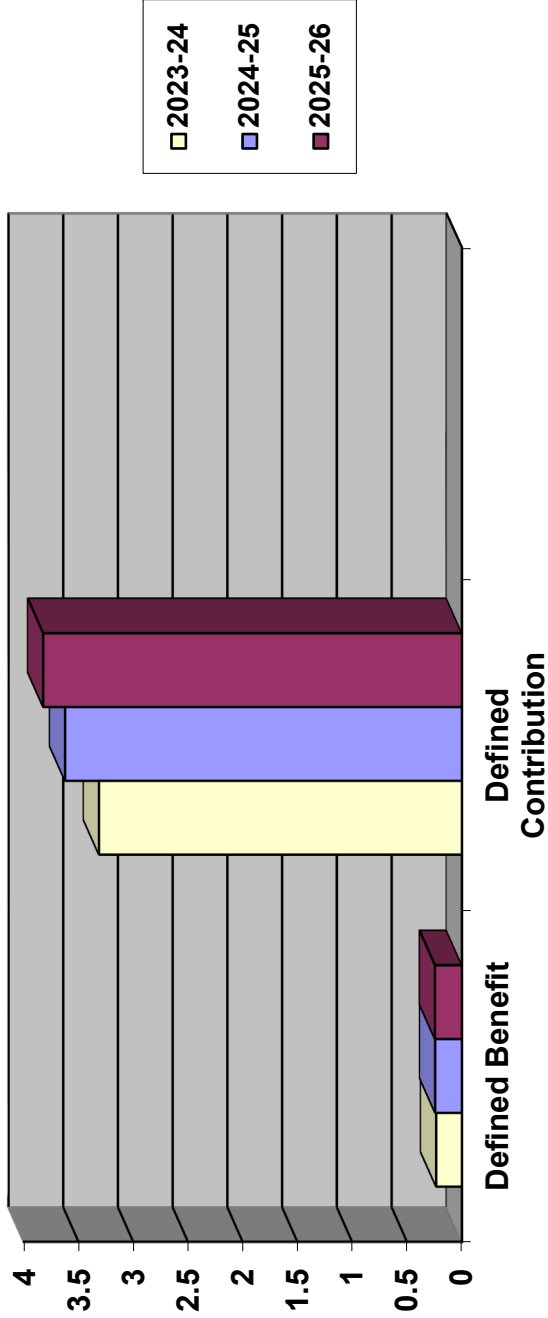
OEA offers two basic pension plans for associate staff, based on year of hire. One (1) associate staff hired prior to April 17, 1993, is part of a defined benefit pension plan from which the employee may retire after either 27 years or 32 years with full pension based on 64% of the five-year final average salary. The employee may retire earlier but will receive a reduced benefit. Associate staff hired on or after April 17, 1993, are part of a defined contribution plan for which the employer is obligated to contribute 17.5% of the employee's yearly compensation.

All OEA defined benefit pension plans offer an early retirement option based on the retiree's age. For certain categories of retirees eligible for the defined benefit plans, cost of living adjustments is available, based on the year in which they were hired.

Pension expenses have been the subject of considerable discussion for many years, largely since it has increased so significantly to comply with rules based on varying legislation. In large measure, these increases resulted from the significant and unexpected declines in the stock market in past years. These declines in the market reduced the value of the pension assets relative to the pension plans' obligations. Although the assets have historically regained their value, these declines continue to govern changes in pension legislation and corresponding required contributions. Legislation passed by the U.S. Congress significantly impacting OEA pension plans have been The Bipartisan Budget Act of 2015 that sharply increased required PBGC premiums OEA is required to pay. The American Rescue Plan Act of 2021 allows stabilized interest rate assumptions for funding calculations, thus decreasing contribution requirements by improving funding percentages.

A detailed explanation of each category of expense follows the graph and table.

PENSION EXPENSE



	2022-23 Actuals	2023-24 Adjusted Budget	2024-25 Budget	2025-26 Budget
Defined Benefit Pension	\$ (874,228)	\$ 234,258	\$ 242,666	\$ 245,206
Defined Contribution Pension	<u>3,125,120</u>	<u>3,312,607</u>	<u>3,622,664</u>	<u>3,822,665</u>
Total Pension Expense	<u>\$ 2,250,892</u>	<u>\$ 3,546,865</u>	<u>\$ 3,865,330</u>	<u>\$ 4,067,871</u>

PENSION EXPENSE

Pension – Defined Benefit

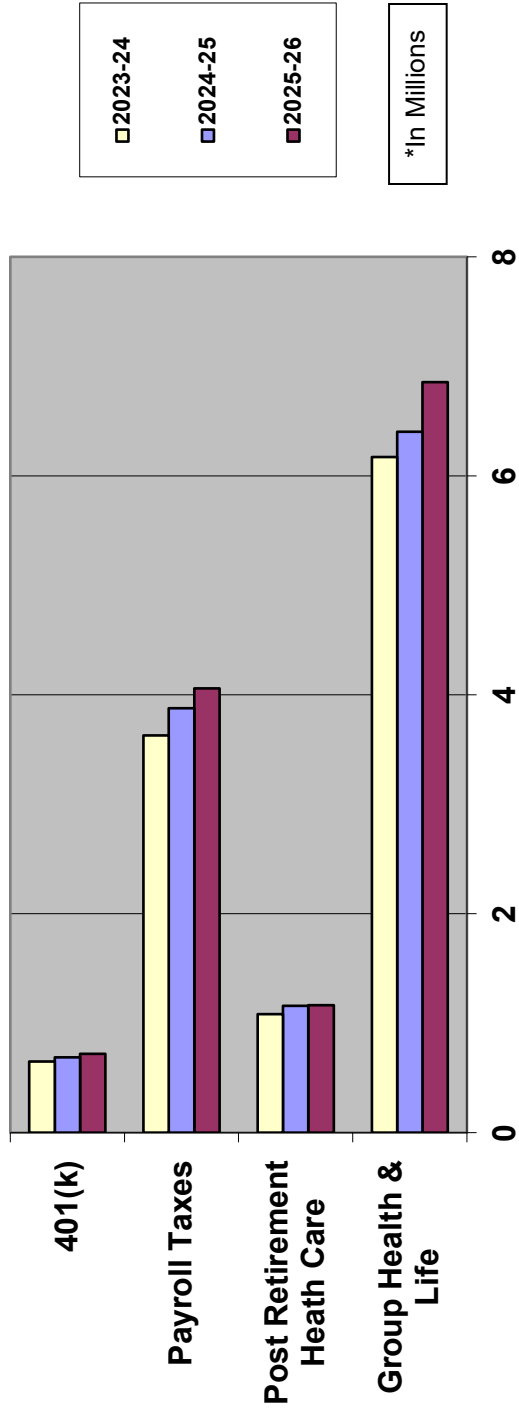
The defined benefit pension expense for budget year 2024-25 is increasing \$8,408 compared to the 2023-24 budget and is budgeted to increase \$2,540 in fiscal year 2025-26. Expense and contribution funding for both the union and management defined benefit plans are determined by an independent actuary firm. This adjustment reflects the most up-to-date information obtained from the actuaries and expected PBGC premium payments. It is important to note that new non-manager employees are covered by the defined contribution pension plan.

Pension – Defined Contribution

The defined contribution pension expense is budgeted to increase \$310,057 for 2024-25 and increase \$200,001 in fiscal year 2025-26. The overall increase over the two-year budgets is due to budgeted salary step and base increases for both unions. As the number of new hires increases due to retirements, the defined contribution plan will continue to rise, respectively. The defined contribution pension expense is based on a pre-established percentage of employee earnings that is contributed per pay for both the professional staff and associate staff to an individual account for each eligible employee. The actual benefit paid at the time of retirement is based on those contributions and their investment earnings.

HEALTH INSURANCE AND OTHER BENEFITS

The budget for health insurance and other related benefits for 2024-25 is \$12,125,741, which represents a 4.9% increase from the approved 2023-24 budget. The requested budget for health insurance and other such benefits for the 2025-26 budget is \$12,795,178, which represents a 5.2% increase over the proposed 2024-25 budget. The following graph and table illustrate the composition of the budgeted health insurance and other benefit expense for fiscal years 2023-24, 2024-25 and 2025-26 with the dollar amount for each category of expense. A detailed explanation of each category of expense follows the graph and table.



	2022-23 Actuals	2023-24 Adjusted Budget	2024-25 Budget	2025-26 Budget
Group Health and Life	\$ 5,754,645	\$ 6,170,517	\$ 6,401,272	\$ 6,854,841
Postretirement Health care	1,005,646	1,082,454	1,158,206	1,163,531
Payroll Taxes	3,450,641	3,629,490	3,878,414	4,057,390
401(k)	<u>632,973</u>	<u>650,228</u>	<u>687,848</u>	<u>719,416</u>
Total Health Ins. & Other Ben.	<u>\$10,843,905</u>	<u>\$11,532,689</u>	<u>\$12,125,741</u>	<u>\$12,795,178</u>

HEALTH INSURANCE AND OTHER BENEFITS

Group Health and Life Expense

Group health and life expenses for the budget year 2024-25 is approximately \$230,756 more than the amount budgeted in the 2023-24 budget. The 2025-26 proposed budget reflects an increase of \$453,569 expense over the requested 2024-25 budget. This is a 3.6% increase in 2024-25 over the 2023-24 budget and is a 6.6% increase in 2025-26 over the 2024-25 budget. These changes reflect a best estimate, based on information from OEA's healthcare provider and third-party consultants, along with experience. Professional staff contribute 6.4% of the medical, prescription drug insurance premium (up to \$110 per pay period) while Associate staff contribute 4% of the medical and prescription drug insurance premium (up to \$70 per pay period).

Postretirement Healthcare Expense

Postretirement healthcare expense in budget 2024-25 is approximately \$75,752 more than the 2023-24 approved budget. This expense is budgeted to increase \$5,325 in fiscal year 2025-26 compared to the 2024-25 budget. The budget for this expense is determined by an independent actuary firm and the expenses incurred with the health reimbursement account.

Payroll Taxes

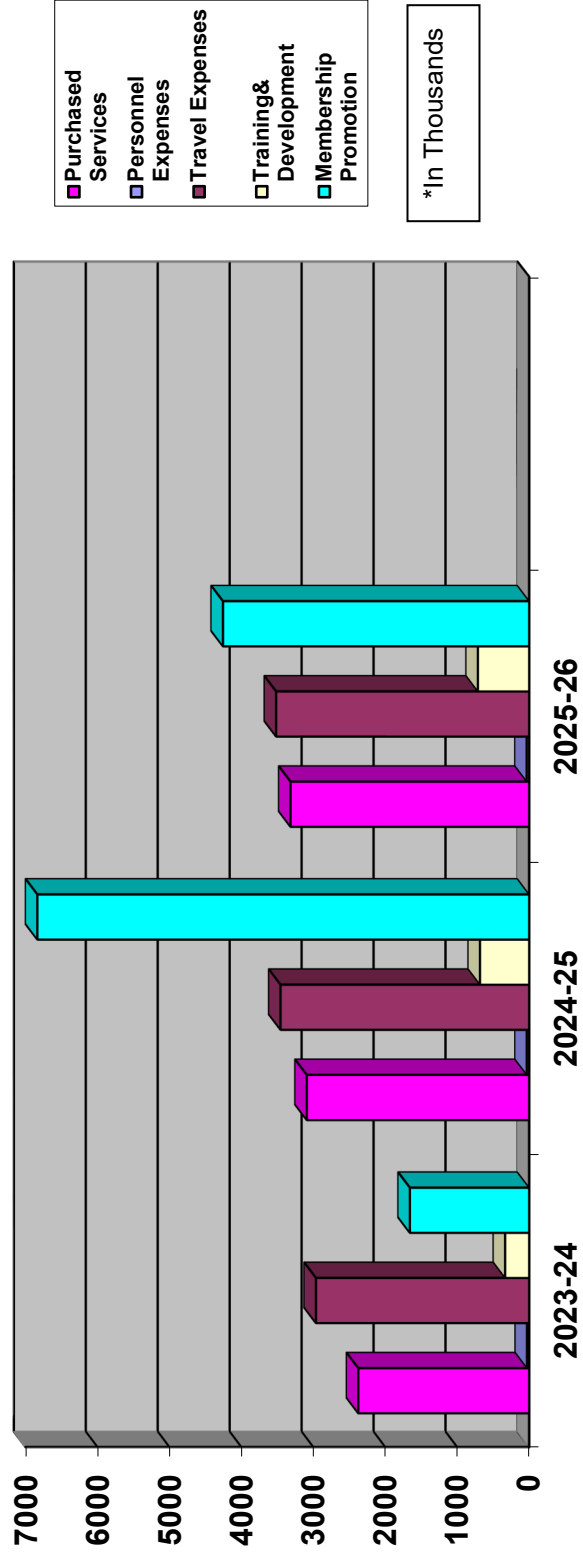
Payroll tax expenses are expected to increase approximately \$248,924 and increase \$178,975 for the budget years 2024-25 and 2025-26, respectively. This change reflects the impact on payroll taxes from the overall change in salaries which is primarily subject to bargained salary increases and employee turnover. Payroll taxes include both the employer's and employee's FICA tax, federal unemployment, state unemployment and workers' compensation taxes. Payroll taxes as a percentage of salaries, are approximately 16%.

401K

The 401(k) expenses for budget year 2024-25 are approximately \$37,620 more than was budgeted in 2023-24. The proposed budget for 2025-26 increases \$31,569 from the requested budget year 2024-25. The budget is based on an estimated 85% employee participation in the 401K plan. The 401K plan is voluntary, has an employer match of 3.5% for manager and professional staff and 3% employer match for the associate staff.

PURCHASED SERVICES, PERSONNEL AND TRAINING EXPENSE

Total budgeted expenses for purchased services, personnel, travel, training, and membership promotion during 2024-25 are \$14,095,927. This amount represents a 91.6% increase from the previously approved 2023-24 budget. The budget for 2025-26 is \$11,831,105, representing a decrease of 16.1%. The increase in expenses in these categories primarily reflects the increases in independent contractors, other travel expenses such as hotel and staff meals, staff training, and membership promotion includes local leader training. The following graph and table illustrate the composition of budgeted purchased services, personnel, travel, training, and membership promotion expenses for the 2024-25 and 2025-26 budgets. A detailed explanation of each category follows the graph and table.



PURCHASED SERVICES, PERSONNEL AND TRAINING EXPENSE

	2022-23 Actuals	2023-24 Adjusted Budget	2024-25 Budget	2025-26 Budget
Purchased Services	\$ 1,747,503	\$ 2,374,383	\$ 3,090,515	\$ 3,315,799
Personnel Expenses	8,654	28,700	32,156	33,156
Travel	2,717,595	2,963,037	3,454,813	3,515,709
Training and Development	152,878	332,643	683,492	711,786
Association/ Membership Promotion	<u>2,083,939</u>	<u>1,657,323</u>	<u>6,834,951</u>	<u>4,254,655</u>
Total	<u>\$ 6,710,569</u>	<u>\$ 7,356,086</u>	<u>\$14,095,927</u>	<u>\$11,831,105</u>

Purchased Services

Compared to the 2023-24 budget, the increase of \$716,132 in fiscal year 2024-25 and an increase of \$225,284 in 2025-26 are the result of increases particularly in independent contractors and other purchased services which includes computer fees to keep up with cyber security and technology.

Personnel Expenses

The 2024-25 personnel expense has been increased approximately \$3,456 from the 2023-24 approved budget with an increase of \$1,000 in 2025-26 from the 2024-25 budget. This change is primarily due to increases in other personnel expenses which include background checks. Personnel expenses include interview, advertisement, and relocation expenses.

Travel

The 2024-25 increase in travel expense of \$491,776 from the 2023-24 budget reflects an increase primarily in staff travel, non-staff travel, meals, hotels, and meeting rooms. The 2025-26 budget has increased by \$60,896 from the 2024-25 budget.

PURCHASED SERVICES, PERSONNEL AND TRAINING EXPENSE

Training and Development

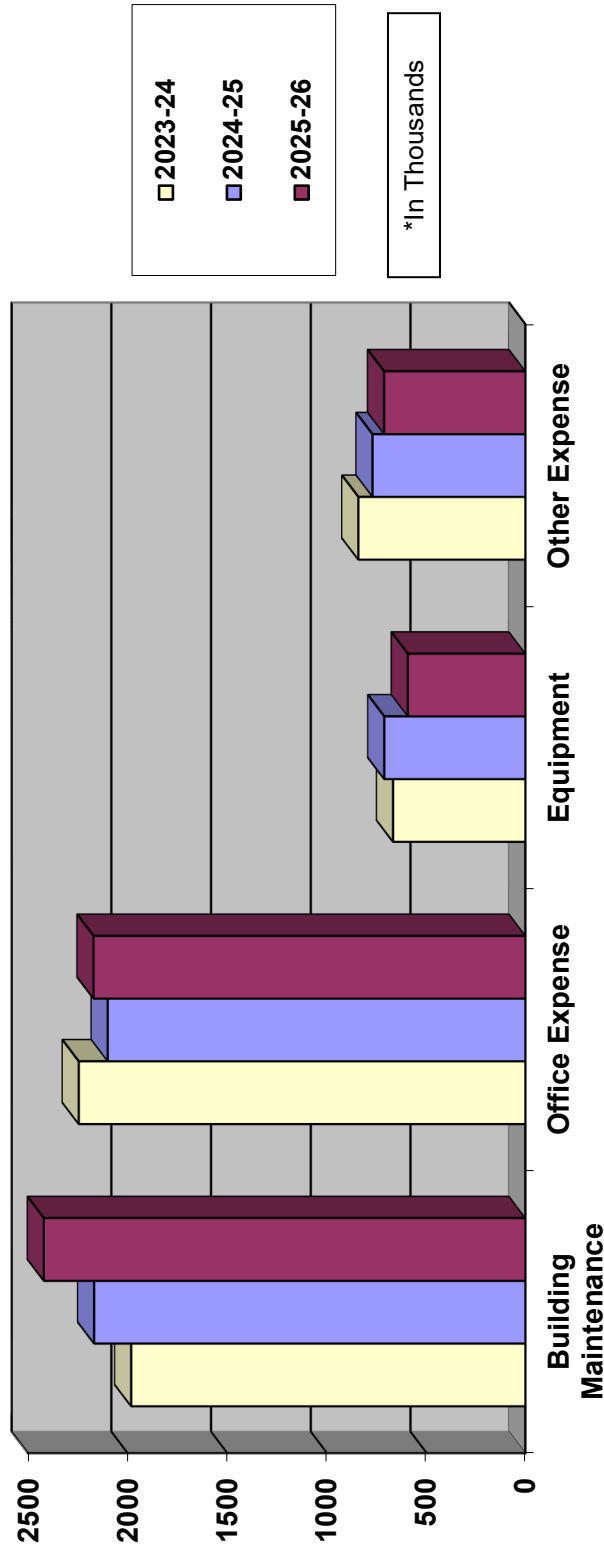
Fiscal year 2024-25 is budgeted to increase by \$350,849, a 105.5% increase from the 2023-24 budget. Budget year 2025-26 is budgeted to increase \$28,294, a 4.1% increase from the 2024-25 budget. The overall increase reflects the organizations commitment to provide professional development growth to new and existing staff members and the anticipated addition in costs for various training expenditures primarily in registration, hotels, meals, and transportation.

Association/Membership Promotion

The 2024-25 budget is increased by \$5,177,628 from fiscal year 2023-24 and is budgeted to decrease by \$2,580,296 in 2025-26 compared to the 2024-25 proposed budget. The increase in this area is the result of additions in local leader training, organizing, member promotions and other association promotions which include guest meals and crisis expenses. This section reflects a re-focused commitment in 2024-25 to engaging members and improving the value the Association provides for its membership.

BUILDING MAINTENANCE AND OPERATIONS

Total building maintenance and operations expenses for 2024-25 are \$5,752,929. The 2025-26 budget for building maintenance and operations expense is \$5,900,042. This projection represents a marginal increase in 2024-25 from the approved 2023-24 budget and a 2.6% increase in 2025-26 from the projected 2024-25 budget. The following graph and table illustrate the composition of budgeted building maintenance and operations expense for the proposed 2024-25 and 2025-26 budgets. A detailed explanation of each category of expense follows the graph and table.



BUILDING MAINTENANCE AND OPERATIONS

	2022-23 Actuals	2023-24 Adjusted Budget	2024-25 Budget	2025-26 Budget
Building Maintenance & Operation	\$ 1,603,302	\$ 1,982,396	\$ 2,167,760	\$ 2,420,157
Office Expense	2,192,485	2,244,986	2,099,672	2,170,997
Equipment	305,194	669,227	713,420	595,345
Other Expense	<u>751,803</u>	<u>842,545</u>	<u>772,077</u>	<u>713,543</u>
Total	<u>\$ 4,852,784</u>	<u>\$ 5,739,154</u>	<u>\$ 5,752,929</u>	<u>\$ 5,900,042</u>

Building Maintenance and Operation Expense

The \$185,364 increase in building maintenance and operation expense for fiscal year 2024-25 and the \$252,396 increase in fiscal year 2025-26 reflect the anticipated expenses in utilities, rents, building repairs and building management expenses based on previous actual results and expected increases.

Office Expense

The \$145,313 decrease in office expenses for fiscal year 2024-25 and \$71,325 increase for 2025-26 are reflective of the online printing of the Ohio Schools magazine and increased postage costs.

Equipment

The \$44,193 increase in equipment budget for 2024-25 is based on projected purchases of equipment. There is a decrease of \$118,075 in the 2025-26 budget.

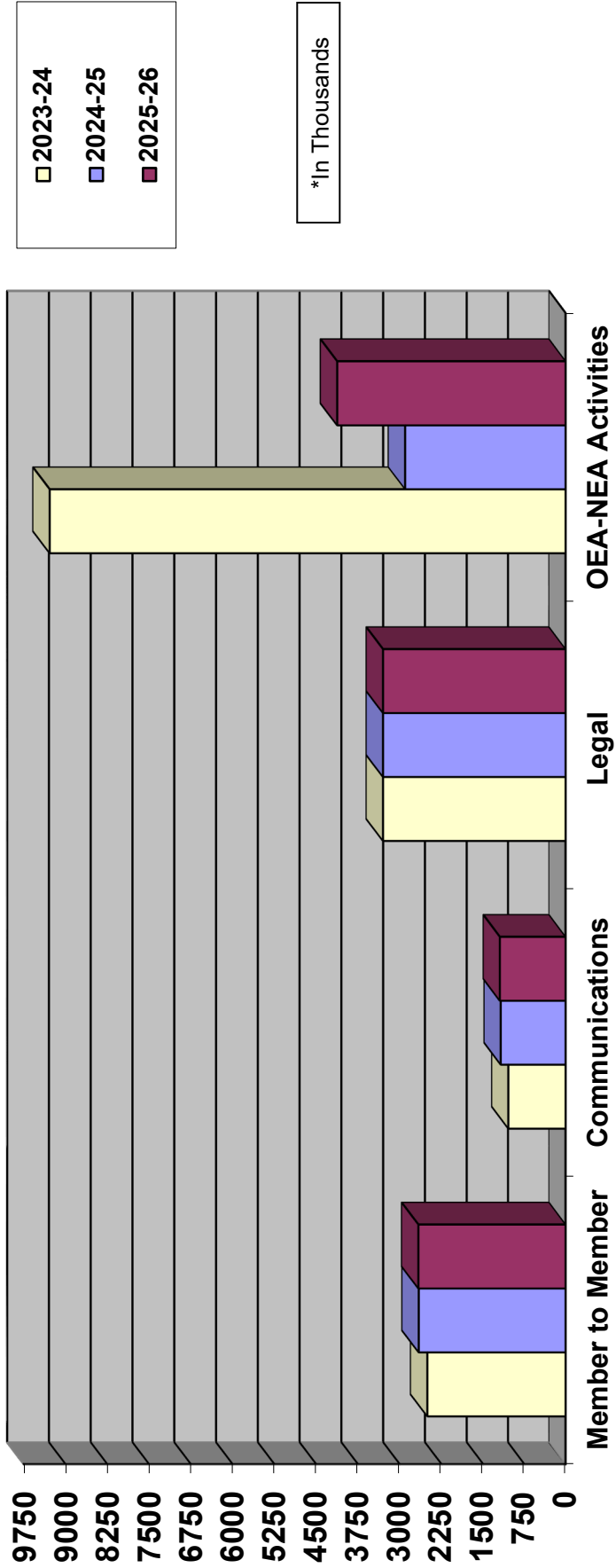
Other Expense

Other expenses decreased in 2024-25 by \$70,468 from the approved 2023-24 budget and decreased \$58,534 in the 2025-26 budget from the 2024-25 requested budget. The decreases in both 2024-25 and 2025-26 years are the result of a decrease in expected depreciation expense. Depreciation is the accounting method for recognizing the decline in the service potential or useful life of tangible property and equipment.

MEMBER RELATED EXPENSE

Member Expenses

Total member expenses budgeted for 2024-25 are \$10,043,992 which represents a 37.7% decrease over the approved 2023-24 budget. Contingency expenses, which is a category in OEA-NEA Activities, is budgeted to decrease from \$6,524,629 in 2023-24 to \$0 for 2024-25 and increase to \$1,190,000 for 2025-26. Total expenses for 2025-26 are \$11,285,082 which represents a 12.4% increase from 2024-25. The following graph and table illustrate the composition of budgeted member expenses for 2024-25 and 2025-26 with the dollar amount for each category of expense. A detailed explanation of each category of expense follows the graph and table.



MEMBER RELATED EXPENSE

	2022-23 Actuals	2023-24 Adjusted Budget	2024-25 Budget	2025-26 Budget
Member to Member	\$ 2,236,144	\$ 2,504,170	\$ 2,659,445	\$ 2,664,845
Communications	505,870	1,042,252	1,180,739	1,196,824
Legal	3,125,168	3,300,199	3,300,196	3,300,196
OEA-NEA Activities	<u>4,070,061</u>	<u>9,283,950</u>	<u>2,903,612</u>	<u>4,123,217</u>
Total	<u>\$ 9,937,243</u>	<u>\$16,130,571</u>	<u>\$10,043,992</u>	<u>\$11,285,082</u>

Member-to-Member

The member-to-member budget for fiscal year 2024-25 is \$2,659,445, a 6.2% increase from the 2023-24 budget. The 2024-25 budget is projected to have a marginal increase to \$2,664,845 in 2025-26. This expense reflects the Association's increase in coalition funds to support friends of public education along with an increase in other member-to-member activities.

Communications

Communications budgeted expense in 2024-25 is increased by \$138,487 compared to the 2023-24 budget, with an increase of \$ 16,085 in the 2025-26 budget. These funds are used for various public education service announcements and media advertising to support OEA's strategic priority of building support for quality public education.

Legal

The legal budget for 2024-25 and 2025-26 is budgeted to remain \$3,300,196 for both fiscal years. The budget reflects the spending levels necessary to maintain retainer agreements with legal firms that can provide quality legal services to members. The budgets also include funds for outside legal counsel related to various other legal matters such as member arbitrations and legal training for OEA staff.

OEA-NEA Activities

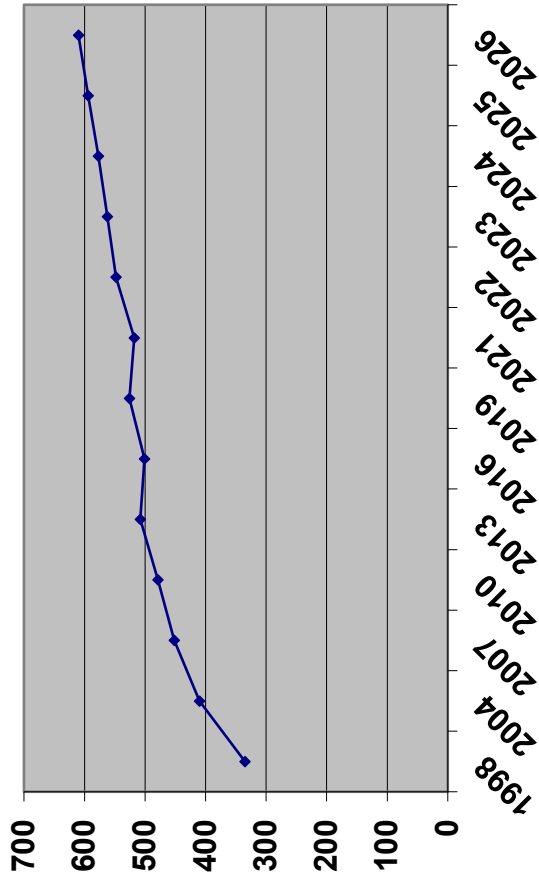
The OEA-NEA activities category decreased by 52.4%, a \$6,380,338 decrease in the 2024-25 requested budget, and increased by 17.4%, a \$1,219,605 increase in the 2025-26 requested budget. This category includes funding for the delegate representation at the NEA Representative Assembly, funding for local option grants and the Affiliate Grant Program, liability insurance, along with funding for scholarships and the contingency fund.

HISTORICAL PERSPECTIVE

The following graphs and tables illustrate the composition of actual and budgeted levels as well as trends of membership growth by category.

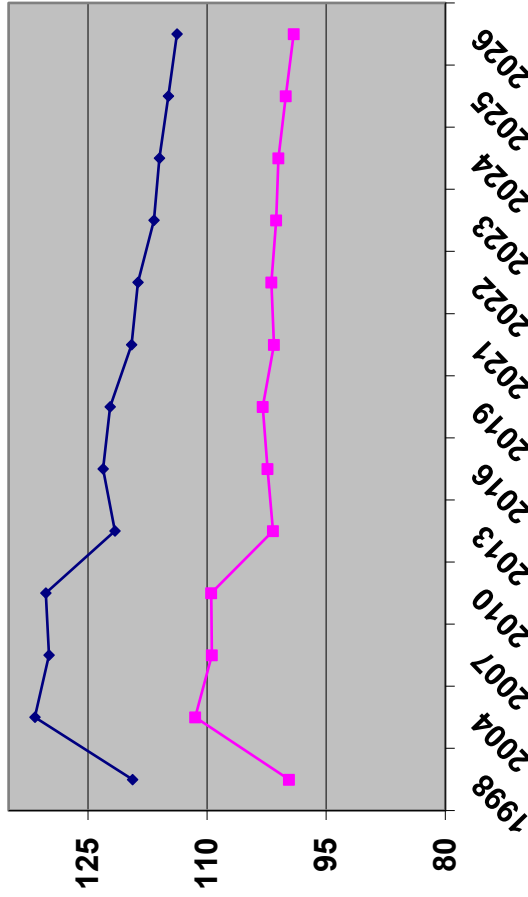
*In Dollars

—◆— Membership Total Dues Trends



* Full Member Equivalent

—◆— Total —■— FME*



HISTORICAL PERSPECTIVE

Membership Dues Trend

Year	Average Teacher Salary Increase	OEA Dues	UniServ Dues	Total Dues	Annual % Increase
2026	2.6%	539.00	71.00	610.00	2.6%
2025	3.1%	525.00	69.00	594.00	2.9%
2024	2.6%	510.00	67.00	577.00	2.6%
2023	2.6%	497.00	65.00	562.00	2.5%
2022	5.7%	484.00	64.00	548.00	5.8%
2021	-1.8%	458.00	60.00	518.00	-5.3%
2020	4.2%	466.00	81.00	547.00	4.0%
2019	3.0%	447.00	79.00	526.00	2.9%
2018	3.5%	434.00	77.00	511.00	3.2%
2017	-1.2%	420.00	75.00	495.00	-1.2%
2016	-0.7%	425.00	76.00	501.00	-0.6%
2015	-0.7%	428.00	76.00	504.00	-0.8%
2014	0.0%	431.00	77.00	508.00	0.0%
2013	1.4%	431.00	77.00	508.00	1.4%
2012	2.4%	425.00	76.00	501.00	2.2%
2011	2.3%	415.00	75.00	490.00	2.3%
2010	0.2%	406.00	73.00	479.00	0.2%
2009	-0.5%	405.00	73.00	478.00	-0.6%
2008	6.6%	407.00	74.00	481.00	6.4%
2007	1.5%	382.00	70.00	452.00	1.3%
2006	3.1%	376.00	70.00	446.00	3.0%
2005	5.7%	365.00	68.00	433.00	5.6%
2004	2.2%	345.00	65.00	410.00	2.0%
2003	3.9%	338.00	64.00	402.00	3.6%

HISTORICAL PERSPECTIVE

Membership Growth Trends

Year	Regular	ESP	Retired (Including Active Life)	Student	Total	FME's	Total % Change
2026(B)	95,268	10,199	7,643	648	113,757	99,118	-1.0%
2025(B)	96,230	10,302	7,718	654	114,904	100,119	-0.9%
2024(P)	97,202	10,406	7,725	661	115,994	101,046	-0.6%
2023(A)	97,220	10,702	7,797	803	116,734	101,330	-1.7%
2022(A)	97,564	11,560	8,185	925	118,666	101,827	-0.7%
2021(A)	97,271	11,847	9,144	1,224	119,486	101,646	-1.9%
2020(A)	98,305	12,290	9,843	1,360	121,800	102,797	-0.3%
2019(A)	98,454	12,615	9,981	1,155	122,205	102,951	-1.5%
2018(A)	99,294	13,588	10,062	1,094	124,038	104,829	-0.6%
2017(A)	99,702	14,288	10,122	643	124,755	104,448	1.3%
2016(A)	98,303	13,982	10,215	630	123,130	102,444	1.2%
2015(A)	97,366	13,624	9,923	712	121,625	101,740	0.3%
2014(A)	96,779	13,624	9,977	847	121,227	101,104	-0.1%
2013(A)	97,041	13,658	9,678	991	121,368	101,287	-1.9%
2012(A)	98,946	14,198	9,479	1,119	123,742	103,360	-3.6%
2011(A)	102,847	14,749	9,455	1,318	128,369	107,656	-1.5%
2010(A)	104,857	14,968	9,218	1,242	130,285	109,465	0.0%
2009(A)	104,806	15,173	9,132	1,212	130,323	109,574	0.5%
2008(A)	104,350	15,100	8,967	1,279	129,696	109,068	-0.1%
2007(A)	104,890	15,036	8,588	1,336	129,850	109,423	-0.4%
2006(A)	105,526	14,620	8,557	1,642	130,345	110,052	-0.4%
2005(A)	105,666	14,879	8,568	1,771	130,884	110,287	-0.6%
2004(A)	106,895	14,655	8,370	1,766	131,686	111,530	0.5%
2003(A)	106,694	14,489	8,372	1,534	131,089	111,456	1.8%

HISTORICAL PERSPECTIVE

Average Teacher Salary and Dues Calculation

Fiscal Year Ended	Prior Year Average Salary	Average Salary Percent Change	OEA Rate (in Mills)	OEA Dues	UniServ Dues	UniServ Rate (in Mills)	UniServ Dues Purpose	Total Dues
1987	\$ 24,518	7.2%	7.6	\$186.00	\$12.50		UniServ Delivery Program	\$198.50
1988	\$ 26,288	7.2%	7.6	\$200.00	\$12.50		UniServ Delivery Program	\$212.50
1989	\$ 27,601	5.0%	7.6	\$210.00	\$12.50		UniServ Delivery Program	\$222.50
1990	\$ 29,166	5.7%	7.6	\$222.00	\$12.50		UniServ Delivery Program	\$234.50
1991	\$ 31,170	6.9%	7.6	\$237.00	\$12.50		UniServ Delivery Program	\$249.50
1992	\$ 32,630	4.7%	7.6	\$248.00	\$12.50		UniServ Delivery Program	\$260.50
1993	\$ 34,360	5.3%	7.6	\$261.00	\$12.50		UniServ Delivery Program	\$273.50
1994	\$ 34,620	0.8%	7.6	\$263.00	\$12.50		UniServ Delivery Program	\$275.50
1995	\$ 35,684	3.1%	7.6	\$271.00	\$36.00	1.0	UniServ Delivery Program	\$307.00
1996	\$ 36,685	2.8%	7.6	\$279.00	\$37.00	1.0	UniServ Delivery Program	\$316.00
1997	\$ 38,089	3.8%	7.6	\$289.00	\$38.00	1.0	UniServ Delivery Program	\$327.00
1998	\$ 38,970	2.3%	7.6	\$296.00	\$39.00	1.0	UniServ Delivery Program	\$335.00
1999	\$ 39,801	2.1%	7.6	\$302.00	\$40.00	1.0	UniServ Delivery Program	\$342.00
2000	\$ 40,508	1.8%	7.6	\$308.00	\$41.00	1.0	UniServ Delivery Program	\$349.00
2001	\$ 41,446	2.3%	7.6	\$315.00	\$41.00	1.0	UniServ Delivery Program	\$356.00
2002	\$ 42,804	3.3%	7.6	\$325.00	\$63.00	1.0	UniServ Delivery Program	\$388.00
2003	\$ 44,492	3.9%	7.6	\$338.00	\$64.00	1.0	UniServ Delivery Program	\$402.00
2004	\$ 45,452	2.2%	7.6	\$345.00	\$65.00	1.0	UniServ Delivery Program	\$410.00
2005	\$ 48,042	5.7%	7.6	\$365.00	\$68.00	1.0	UniServ Delivery Program	\$433.00
2006	\$ 49,522	3.1%	7.6	\$376.00	\$70.00	1.0	UniServ Delivery Program	\$446.00
2007	\$ 50,247	1.5%	7.6	\$382.00	\$70.00	1.0	UniServ Delivery Program	\$452.00
2008	\$ 53,575	6.6%	7.6	\$407.00	\$74.00	1.0	UniServ Delivery Program	\$481.00
2009	\$ 53,299	-0.5%	7.6	\$405.00	\$73.00	1.0	UniServ Delivery Program	\$478.00
2010	\$ 53,410	0.2%	7.6	\$406.00	\$73.00	1.0	UniServ Delivery Program	\$479.00
2011	\$ 54,656	2.3%	7.6	\$415.00	\$75.00	1.0	UniServ Delivery Program	\$490.00
2012	\$ 55,958	2.4%	7.6	\$425.00	\$76.00	1.0	UniServ Delivery Program	\$501.00
2013	\$ 56,715	1.4%	7.6	\$431.00	\$77.00	1.0	UniServ Delivery Program	\$508.00
2014	\$ 56,715	0.0%	7.6	\$431.00	\$77.00	1.0	UniServ Delivery Program	\$508.00
2015	\$ 56,307	-0.7%	7.6	\$428.00	\$76.00	1.0	UniServ Delivery Program	\$504.00
2016	\$ 55,916	-0.7%	7.6	\$425.00	\$76.00	1.0	UniServ Delivery Program	\$501.00
2017	\$ 55,243	-1.2%	7.6	\$420.00	\$75.00	1.0	UniServ Delivery Program	\$495.00
2018	\$ 57,154	3.5%	7.6	\$434.00	\$77.00	1.0	UniServ Delivery Program	\$511.00
2019	\$ 58,849	3.0%	7.6	\$447.00	\$79.00	1.0	UniServ Delivery Program	\$526.00
2020	\$ 61,346	4.2%	7.6	\$466.00	\$81.00	1.0	UniServ Delivery Program	\$547.00
2021	\$ 60,247	-1.8%	7.6	\$458.00	\$60.00	1.0	UniServ Delivery Program	\$518.00
2022	\$ 63,709	5.7%	7.6	\$484.00	\$64.00	1.0	UniServ Delivery Program	\$548.00
2023	\$ 65,347	2.6%	7.6	\$497.00	\$65.00	1.0	UniServ Delivery Program	\$562.00
2024	\$ 67,072	2.6%	7.6	\$510.00	\$67.00	1.0	UniServ Delivery Program	\$577.00
2025	\$ 69,135	3.1%	7.6	\$525.00	\$69.00	1.0	UniServ Delivery Program	\$594.00
2026	\$ 70,933	2.6%	7.6	\$539.00	\$71.00	1.0	UniServ Delivery Program	\$610.00

OE A CORE VALUES

These principles guide our work and define our mission. We believe in:

1. Democracy

The foundation of a strong democracy is high quality public education, which is essential for an educated citizenry.

2. Collective Action

When we unite as one voice, we are strong advocates for learners and our profession.

3. Fairness

A high quality education, accessible to all, promotes a fair and just society.

4. Inclusion

We respect and embrace the diversity of all communities.

5. Integrity

By holding ourselves to the highest standards, we promote good citizenship and maintain the public trust.

6. Professionalism

Professional judgment and expertise of educators are critical to student success. Educators deserve the status, compensation and respect due all professionals.



OUR COLLECTIVE POWER MAKES A REAL DIFFERENCE!

Stand up for public education by contributing to the OEA Fund for Children and Public Education, now known as the OEA Fund. The OEA Fund's strength comes from educators like you who generously give small donations – making the OEA Fund the largest Ohio PAC consisting of solely small dollar donations. The OEA Fund recommends and supports candidates that support public schools and educators, regardless of party. This Spring, the OEA Fund contribution goal for each OEA RA delegate is \$100 – please help us reach that goal by scanning the QR code below or stop by the OEA Fund table at the Spring RA.



Spring RA contributions for the OEA Fund can be made by scanning the Spring RA QR code above.