

Adopted February 28, 2014
Amended March 6, 2015
Amended June 3, 2019
Amended March 5, 2021
Amended June 4, 2021



CTA/NEA- RETIRED BYLAWS

ARTICLE I – NAME

The name of this Association shall be the California Teachers Association/National Education Association-Retired (CTA/NEA-Retired).

ARTICLE II – AFFILIATES

CTA/NEA-Retired shall be the statewide affiliate of the California Teachers Association (CTA) to enroll and provide services to retired members of CTA if applicable or other state affiliates and of the National Education Association (NEA). CTA/NEA-Retired may additionally form and work through local CTA/NEA-Retired affiliates as hereinafter described.

ARTICLE III – PURPOSE

This Association shall be dedicated to the promotion of retirement with dignity, a fair and just retirement income, a comprehensive health care program, and decent, affordable housing through:

- a) Promoting the social, professional and economic status and the general welfare of retirees
- b) Promoting volunteer participation by its members in educational and civic affairs
- c) Promoting united action with CTA/NEA and its local affiliates and others devoted to the cause of public education

ARTICLE IV – MEMBERSHIP

Section 1. Eligibility

- a) Any person who was a member of CTA/NEA and is a qualified recipient of service or disability retirement allowances from a public or private retirement system may become a CTA/NEA-Retired Member.
- b) Any person who is a member of the National Education Association-Retired (NEA-Retired) and a member of his/her NEA/Pension State Retired Affiliate, but was not a member of CTA, and is a qualified recipient of service or disability retirement allowances from a public or private retirement system, may become a Partner Member of CTA/NEA Retired.

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Section 2. Retired Members Actively Employed in School Districts

- a) Members who are drawing retirement from STRS or PERS and are employed as a substitute in a school district on a day-to-day basis shall be considered CTA/NEA – Retired members, except substitutes who are dues-paying members of a recognized bargaining unit
- b) A member who is drawing retirement from STRS or PERS and returns to employment in a bargaining unit represented by CTA in a school district shall not be considered eligible for CTA/NEA-Retired membership

Section 3. Pre-retired Subscribers

- a) Members of CTA shall be eligible to become pre-retired subscribers
- b) Pre-retired subscribers shall not have the right to vote or run for office in any election of CTA/NEA- Retired officers, CTA/NEA-Retired representatives to the State Council of Education nor CTA/NEA-Retired representatives to the NEA Representative Assembly

Section 4. NEA-Retired Affiliation

- a) Anyone admitted to any category of membership in CTA/NEA-R must also become a member through the payment of dues to NEA-Retired, unless the person was granted a waiver of this requirement on or before September 1, 1998
- b) Any member who has not maintained membership in NEA-Retired in accordance with 4.a above will not receive any services from NEA-Retired, and will not be counted for purposes of NEA-Retired delegation allocation in California
- c) If a life member or any other member of NEA-Retired becomes a member of CTA/NEA-Retired after September 1, 1998, the member must retain his/her membership in CTA/NEA-Retired thereafter

Section 5. Rights of Membership

- a) Upon the receipt of a retirement allowance, each member of CTA/NEA-Retired shall have the right to vote and hold office and shall receive all CTA/NEA-Retired publications
- b) Any member may attend CTA/NEA-Retired membership meetings at his/her own expense
- c) No member shall be censured, suspended or expelled from membership without a due process hearing, which shall include the right to appellate review

Section 6. Rights of Partner Membership

- a) Partner Members shall be entitled to all the benefits and services offered by NEA-Retired (e.g.: NEA Member Benefits, Liability Insurance)
- b) Partner Members shall be entitled to receive communications (e.g.: Newsletters/ Mailings/E- Mailings) from CTA/NEA-Retired and NEA-Retired
- c) Partner Members shall have the right to run for, vote, and hold office in local retired chapters (where applicable)
- d) Partner Members shall be eligible to hold appointed positions in the Local and State (Retired) Association
- e) Partner Members, as NEA-Retired Members in good standing, shall maintain their membership and governance rights in their “pension state” affiliate.
- f) Partner Members must be Life Members of NEA-Retired.

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- g) Partner Members maintain the right to run as a retired delegate to the NEA Representative Assembly from their “pension state”, but not as a representative from CTA/NEA-Retired
- h) Partner Members **shall not** have the right to run for or vote in any election of CTA/NEA-Retired officers or CTA/NEA-Retired Representatives to the State Council of Education
- i) Partner Members **shall not** be entitled to any benefits or protections offered to former active CTA Members through CTA. (e.g.: CTA Member Benefits, Legal Representation).

ARTICLE V – OFFICERS

Section 1. Titles

The officers of the Association shall be President, Vice President, and Secretary-Treasurer.

Section 2. Terms of Office

Officers shall be elected for a term of two years, commencing on June 26 of even-numbered years. Officers shall be limited to two elected terms to the same office. Officers shall be and remain currently paid-up members of CTA/NEA-Retired and NEA-R as a condition for nomination to and service in their respective positions during their term of office.

Section 3. President

The President shall:

- a) Serve as the official representative and spokesperson of the Association
- b) Call regular and special meetings of the Board of Directors and preside at said meetings
- c) Appoint members of all standing committees with the advice and consent of the Board of Directors
- d) Appoint the chair of the Elections Committee and the Membership Chair_
- e) Make an annual report of Association activities to the CTA Board of Directors
- f) Serve as an ex officio member of all standing committees of the Association
- g) Recommend membership programs and services to the CTA/NEA-Retired Board of Directors
- h) Serve as the chair of the NEA-Retired annual meeting delegation
- i) Recommend to the Board individuals to fill vacancies in the office of Vice-President and/or Secretary-Treasurer
- j) Perform other duties as may pertain to the office of President

Section 4. Vice President

The Vice President shall:

- a) Preside at meetings in the absence of the President
- b) Have all the powers and perform all the duties in the absence or incapacity of the President
- c) Succeed to the office of President if that office becomes vacant before the end of a term
- d) Assist in membership promotion, organizing CTA/NEA-Retired programs and other duties assigned by the President

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Section 5. Secretary-Treasurer

The Secretary-Treasurer shall:

- a) Maintain the records of the Association
- b) Prepare an annual report for the Annual Business Meeting of the CTA/NEA-Retired Board of Directors
- c) Prepare the CTA/NEA-Retired budget for consideration by the CTA/NEA-Retired Board of Directors prior to the Annual Business Meeting
- d) Present a year-end internal audit report at the CTA/NEA-Retired Board of Directors' meeting held in January

Section 6. Additional responsibilities for the CTA/NEA-Retired Officers shall be delineated in the CTA/NEA-Retired Standing Rules.

ARTICLE VI – BOARD OF DIRECTORS

Section 1. Composition

The Board of Directors shall be comprised of the officers and the CTA/NEA-Retired representatives to the State Council of Education and the Minority-At-Large Director.

Section 2. Powers and Duties

The Board of Directors shall:

- a) Act as the governing body for CTA/NEA-Retired
- b) Represent retired member concerns within the California Teachers Association
- c) Approve programs and projects and assist in their implementation
- d) Work within CTA established procedures to develop legislative priorities on retirement issues
- e) Fill vacancies in the state offices of CTA/NEA-Retired except for the office of President
- f) Approve the annual budget for submission to the Annual Business Meeting of the CTA/NEA-Retired
- g) Attend meetings of CTA/NEA-Retired
- h) Additional responsibilities for the CTA/NEA-Retired Board of Directors (and State Council representatives) shall be delineated in the CTA/NEA-Retired Standing Rules

Section 3. Minority-At-Large Director

In addition to the powers and duties listed in Section 2, the Minority-At-Large Director shall:

- a) Attend REAC meetings when invited
- b) Attend meetings at CTA State Council of the Civil Rights in Education Committee

ARTICLE VII – STAFF

The Board of Directors may contract with the California Teachers Association for a staff liaison.

ARTICLE VIII – GEOGRAPHICAL AREAS AND LOCALS

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Section 1. Regions

There shall be four geographical regions of CTA/NEA-Retired that shall be the same as the four geographical regions of CTA. With the exception of the statewide At-Large CTA State Council representative, these regions shall be the electoral districts for electing members and alternates to the State Council of Education of the California Teachers Association.

Section 2. Local Associations

Local Associations may be established by retired members within local areas, and shall be subject to the policies of CTA/NEA-Retired.

- a) Twenty or more CTA/NEA-Retired members may establish a chapter of CTA/NEA-Retired
- b) The CTA/NEA-Retired Board of Directors shall have the authority to recognize and issue charters to CTA/NEA-Retired locals
- c) CTA/NEA-Retired will assist in the organization of locals to ensure that local bylaws shall be in conformity with CTA and NEA guidelines
- d) Newly organized chapters shall be given formal recognition at the Annual Business Meeting of the CTA/NEA-Retired Board of Directors
- e) Subject to an annual internal audit, each local chapter may establish its own dues structure and budget to be used for its needs

ARTICLE IX – REPRESENTATIVES TO STATE AND NATIONAL AFFILIATES

There shall be nine representatives to the CTA State Council of Education, elected in conformity with both the CTA and CTA/NEA-Retired Bylaws. Allocation of delegates to the NEA Representative Assembly shall be in accordance with the NEA Bylaws.

ARTICLE X – NOMINATIONS AND ELECTIONS

Section 1. Nominations and Elections

CTA/NEA-Retired shall have open nominations and a secret ballot for all officers, State Council of Education representatives and delegates to the National Education Association Representative Assembly. Election shall be by plurality vote.

Section 2. Conduct of Elections

- a) All CTA/NEA-Retired elections will be monitored by the CTA/NEA-Retired elections committee which, when applicable, shall be informed of any electronic voting procedures conducted by a Board-selected electronic voting vendor
- b) CTA/NEA-Retired may contract with the California Teachers Association to conduct the elections of CTA/NEA-Retired officers, State Council of Education representatives and delegates to the National Education Association Representative Assembly. This process may include a CTA-approved vendor chosen by CTA/NEA-Retired to conduct electronic voting
- c) CTA/NEA-Retired will conduct elections through electronic voting and/or by mailing information and ballots to eligible voters, as determined by the Board of Directors

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- d) The CTA/NEA-Retired election rules and procedures may be amended by a majority vote of the Board of Directors

Section 3. General Election Procedures for Officers, State Council Representatives and alternates and NEA Representative Assembly Delegates will be in the CTA/NEA-Retired Standing Rules

Section 4. Recall Election

- a) The members of CTA/NEA-Retired shall have the authority to recall from office any person(s) having been elected thereto by the members.
- b) Any members desiring to recall an elected person must file a copy of a petition with the chairperson of the Elections Committee before it can be circulated.
- c) The petition must include the following information:
 - 1. The name of the individual who is the subject of the recall;
 - 2. The office of the individual;
 - 3. The date of the petition;
 - 4. The reason for the petition;
 - 5. The name(s) of the person(s) filing the petition, with personal email address(es);
 - 6. A notation that "Each signature must be in ink"; and
 - 7. Space must be provided for the printed name, signature, city of residence and date of signing for each signatory.
- d) Within twenty-one (21) calendar days of receipt, the Chairperson of the Elections Committee shall determine if the petition contains the necessary information
 - 1. If it does not, the Chairperson shall notify the petitioner(s).
 - 2. If the petition does contain the necessary information, the Chairperson shall inform the petitioners of the rules, procedures and timeline (beginning date and deadline for gathering of signatures).
 - 3. The Chairperson shall send written notification to the elected individual whose recall is being proposed and shall also notify the Officers. A copy of the recall petition shall be enclosed.
- e) Contributions of monies from, or use of staff or facilities of CTA/NEA-Retired, or any of its local chapters, is prohibited in the recall process.
- f) No unit may state or indicate its preference in its publications, websites or social media.
- g) Ninety (90) calendar days after the beginning date is the deadline for the collection of signatures of at least 10% of the members of CTA/NEA-Retired and their submission to the Chairperson of the Elections Committee.
- h) The Elections Committee shall have fourteen (14) calendar days after receipt of petitions to verify the signatures.
- i) If there are insufficient signatures, the Chairperson of the Elections Committee shall notify the petition circulator(s) by mail, within five (5) calendar days of verifying signatures that the petition failed for a lack of signatures.
- j) If the threshold of verified signatures is reached, the Chairperson shall immediately:
 - 1. Notify the President/designee of the fact that a recall has been initiated.
 - 2. Prepare an election announcement, election timeline (in accordance with the regularly scheduled elections), and declaration of candidacy form(s) for the position(s) if the recall passes.
- k) The election will be held as part of the regular annual CTA/NEA-Retired elections.

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ARTICLE XI – MEETINGS

Section 1. Annual Business Meeting

- a) The Annual Business Meeting of CTA/NEA-Retired shall be held, in-person or virtual, at a time and place or in reasonable proximity of the fourth CTA State Council meeting of the year
- b) The report of the year's activities, the financial statement, the proposed budget, and the goals and programs for the next year shall be presented at the Annual Business Meeting for approval
- c) Items of new business may be introduced and voted on by the members attending the annual meeting

Section 2. General Membership Meetings

There shall be a General Membership Meeting, in-person or virtual, at the CTA/NEA-Retired Annual Retirement Issues Conference. Items of new business may be introduced and voted on by the members attending this Membership Meeting. Membership Meetings may be called by the CTA/NEA Retired Board of Directors with at least a thirty day notice to the membership.

Section 3. Board of Directors

The CTA/NEA-Retired Board of Directors shall have a minimum of two meetings annually called by the President. A special meeting of the Board of Directors may be called by written request of a majority of members of the Board of Directors.

ARTICLE XII – BUSINESS AND FISCAL

Section 1. Fiscal Year

The fiscal year of CTA/NEA-Retired shall be from September 1 through August 31 of the following year.

Section 2. Membership Dues

The dues of CTA/NEA-Retired shall be as set by the governance bodies of CTA/NEA-Retired, CTA and NEA.

Section 3. Expenditure Control

All expenditures of CTA/NEA-Retired shall be made pursuant to policies adopted by the CTA/NEA-Retired Board of Directors in accordance with the approved budget.

Section 4. Annual Audit

An internal audit, supervised by the CTA/NEA-Retired Secretary/Treasurer, shall be performed at the end of each fiscal year. The president may appoint a sub-committee to conduct this audit. The CTA/NEA-Retired Board of Directors may contract with CTA to conduct the audit.

ARTICLE XIII – PARLIAMENTARY AUTHORITY

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All questions of parliamentary procedure not covered by these Bylaws shall be determined by the latest edition of Robert's Rules of Order.

ARTICLE XIV – AMENDMENTS

Section 1. Proposal

Amendments and revisions to these Bylaws may be proposed by a two-thirds vote of the CTA/NEA-Retired Board of Directors.

Section 2. Publication

Proposed amendments or revisions must be published for the CTA/NEA-Retired membership at least 20 days prior to the Annual Business Meeting or 20 days prior to the General Membership Meeting.

Section 3. Adoption

Adoption of proposed amendments shall be by a majority of those members present and voting at the Annual Business Meeting held in proximity of the fourth meeting of CTA State Council, or at the General Membership Meeting held in proximity of the CTA/NEA-Retired Annual Retired Issues Conference.

Section 4. Effective Date

Amendments to these Bylaws shall be effective upon adoption.