OEA-PAC STATEWIDE & FEDERAL CANDIDATE RECOMMENDATIONS

GENERAL POLICY CONCERNING RECOMMENDATION OF STATEWIDE AND FEDERAL CANDIDATES

OEA-PAC has a unique policy for recommendation of statewide and federal candidates. In February or March of each election year, the OEA-PAC Convention is held at a location determined by the OEA Board. The primary purpose of the OEA-PAC Convention will be to allow OEA-PAC members to determine the positions of the respective candidates and make recommendations as to which candidates should be supported by OEA-PAC and the NEA Fund for Children and Education.

Each local association is provided one vote for each $5 in contributions made by members from that local. Other than the general requirement that every delegate must be a contributing member of OEA-PAC, a local is allowed to establish its own procedures for determining who will represent it at the convention. There are also no specific regulations as to the manner by which a local should cast its votes. It may cast all of its votes for a single candidate, or it may split its votes among the various candidates running for office. Unless specifically determined otherwise by the convention, only the candidate receiving a majority vote for each office is the recommended candidate. The results of the convention are communicated to members throughout the state.

The OEA-PAC Board may make recommendations to the convention. The board's responsibilities include dissemination of information concerning the various candidates, and management of the convention.

If a recommended candidate withdraws or is defeated in the primary election, the OEA-PAC Board shall consider additional action for that office.

Key Elements of Statewide Recommendations

1. If a challenging candidate is opposing a satisfactory incumbent, as a general rule OEA-PAC should recommend the incumbent without reference to the record of the challenger.

2. The candidate's chances of winning should be carefully considered based on all available data with focus on the “Criteria for Recommendation of Statewide Candidates” on p. 19. To assist in this process, OEA Staff shall provide a “viability report” prior to debate to include all available, polling, demographic, fundraising, spending, campaign structure, research, media reports and any other quantifiable information available.

3. Prior to casting their votes, delegates should make every effort to assess the OEA-PAC members in their council to determine that the recommendation is consistent with their views, or at least would be acceptable to a majority of the members.

4. Consideration should be given to the impact a recommendation may have on other political situations occurring in the state that may be affected as a result of the recommendations.

5. The candidate's long-term record on OEA-supported educational issues should be carefully reviewed and given more weight than a candidate's statements at a convention.
6. In the event of a vacancy to be filled at an election held other than the regular election dates, the OEA-PAC Board has the authority to recommend a candidate or candidates for the election.

**Federal Candidates**
The OEA-PAC Board and/or the OEA-PAC convention shall make recommendations for President and the Oregon’s Delegation to Congress. The recommendations shall be forwarded to the NEA Fund for final approval. OEA-PAC is not a registered Federal PAC, and cannot contribute to Federal Candidates. The NEA Fund is a Federal PAC and can make contributions to formally recommended candidates (see attached NEA Fund Bylaws).

**OFFICE OF SECRETARY OF STATE**
The Office of Secretary of State is one of the three statewide constitutional elective offices in the state. Those functions of the office that are of greatest importance to education employees are the administration, regulation and enforcement of state and local election laws, determining legislative district boundaries following the U.S. decennial census (when the legislature cannot reach agreement), enforcement of regulations relating to campaign expenditures, and the responsibility for auditing the state's books and those of municipal corporations, including school districts. The Secretary of State is also a member of the State Land Board which has management responsibilities over those lands contributing to the Common School Fund.

Additionally, the position is generally regarded as a stepping-stone to higher office and is frequently used as a base for establishing a platform for other offices.

**OFFICE OF STATE TREASURER**
The Office of State Treasurer is one of the three statewide constitutional elective offices in the state. The function of greatest concern to education employees is the role of custodian of state funds. Investment policies established by the Treasurer have major impact on the income earned by education employee investments in the Public Employees Retirement system, and also to a lesser extent on the dollars available for public education through general obligation bonding and other programs. The Treasurer is also a member of the State Land Board. Because of the status of the office, the position carries substantial weight in the determination of state policies, and like the Office of Secretary of State, is frequently used as a base for establishing a platform for other higher office.

**OFFICE OF ATTORNEY GENERAL**
The Attorney General is the chief legal officer of the state of Oregon and heads the Department of Justice and its seven divisions.

The Attorney General has control and supervision of all court actions and legal proceedings in which the state of Oregon is a party or has an interest; has full charge of all legal business of all state departments, boards, and commissions which require the services of legal counsel; prepares ballot titles for measures to be voted upon by the people of Oregon; and appoints the assistant attorneys general, all of whom serve at his/her pleasure, and who act as counsel for the various state departments, boards, and commissions.

The interest education employees maintain in the position is rather obvious, as the decisions of this officer have a major impact on the implementation of all statutes relating to education.
CRITERIA FOR RECOMMENDATION OF STATEWIDE CANDIDATES –
SECRETARY OF STATE, STATE TREASURER, ATTORNEY GENERAL

1. The level of long-term support for the OEA Measures-Up Criteria:
   a. **Strengthening Public Education** – through support of adequate and stable funding;
   b. **Respecting School Employees** – by preserving their collective bargaining rights, assuring an adequate retirement system and including educators in decision-making processes.
   c. **Maximizing Student Learning** – by providing for professional development, classroom technology and support of Oregon’s system of community colleges;
   d. **Ensuring Students’ Health and Safety** – by support of safe schools and campuses, and of healthy learning environments;

2. The candidate’s chances for winning
   a. **Fit-to-State** – He/she must have a strong base of support with voters willing to volunteer, contribute financial resources, and campaign on his/her behalf.
   b. **Ability to Raise Funds** – The candidate must be willing to raise sufficient funds to be viable. Knowing and having access to the financial community in the state is very important.
   c. **State Profile** – He/she must be able to identify with voters in Oregon and feel that he/she would be the best candidate to represent the state. He/she should have extensive experience in elective office from which to build a base of support.
   d. **Organization** – The candidate must be prepared to turn over the campaign operation to staff, consultants and volunteers. He/she must be able to motivate staff, volunteers, and voters while spending the majority of his/her time fundraising.
   e. **Commitment** – The candidate, his/her family and friends must be willing to make the sacrifices necessary to win. The candidate must be able to give a heart-felt answer to the question, “Why are you running for office?” The fire-in-the-belly desire to win must be palpable to all those in contact with his/her candidacy.

3. The accessibility of the candidate to OEA members and leaders.

4. The candidate’s ability to serve as a spokesperson for the people of the state of Oregon.
CRITERIA FOR RECOMMENDATION OF CANDIDATES TO UNITED STATES HOUSE OF REPRESENTATIVES AND UNITED STATES SENATE

1. The level of long-term support for the OEA-NEA Measures-up Criteria for Children and Public Education. (Legislative record, record in other statewide offices, congressional record, or record of other public positions related to OEA-NEA goals and objectives.)

2. The importance of the candidate to OEA-NEA's legislative program:
   a. Congressional or senatorial committee chairpersonships.
   b. Congressional or senatorial committee memberships.
   c. Congressional or senatorial leadership on key bills.
   d. Congressional or senatorial voting record.

3. The accessibility of the candidate to OEA/NEA leaders.

4. The candidate's ability to win.

4. Assessment based on NEA Fund Criteria.
OEA-PAC CONVENTION

GENERAL RULES OF THE OEA-PAC CONVENTION

Convention Time and Site
The OEA-PAC Board shall determine if a primary and/or general OEA-PAC Convention will be held. The primary consideration will be whether recommendations will be of sufficient importance in the election of OEA recommended candidates to justify a convention. The primary purposes of the convention will be to allow OEA-PAC members to determine the positions of the respective candidates and to make recommendations as to which candidates should be supported by OEA-PAC.

If held, the primary election OEA-PAC Convention will take place in February or March immediately preceding the primary election. The OEA-PAC Board shall establish the time and site, in coordination with other OEA events.

Offices to be Considered for Recommendation
Subject to the specific provisions listed herein, recommendation for the following offices shall be considered: President of the United States, U.S. Senate, Congress, Governor, Secretary of State, State Treasurer, Attorney General, and the Commissioner of the Bureau of Labor and Industries. Candidates not invited to the convention may address the convention upon a presentation to the chair of the signatures of 50 convention delegates and a completed candidate questionnaire.

Recommendations for President and the Oregon Federal Delegation to Congress shall be forwarded to the NEA Fund for final approval.

In the event a recommended candidate is successful in the primary election, that candidate shall continue to have the OEA-PAC recommendation for the general election except by a two-thirds vote of the OEA-PAC Board. If a recommendation is withdrawn, recommendations for the office shall be treated in the same manner as if no recommendation had been made.

Following contested elections where there is no recommended candidate after the primary election or when the selection of the officeholder will be made in a special election, the OEA-PAC Board may choose to recommend one or more of the candidates.

Options Available for Recommendation of Candidates
When considering recommendation for a particular office, alternatives will include all the announced candidates for each office who have: officially announced their candidacy, been deemed viable by the Government Relations staff, or have formed a PAC within the state of Oregon.

In the case of presidential candidates, they must meet the following criteria in order to be considered for recommendation at the convention:
1. Will appear on the Oregon ballot;
2. Are actively campaigning at the time of the convention; and
3. Have completed the NEA questionnaire.

In the event none of the choices on the candidate ballot obtains a majority of the convention’s delegate votes, all candidates who do not finish first or second will be eliminated and a second vote will be taken.
Delegate Information
The Center for Public Affairs will provide the following information to delegates prior to the convention:

a. Rules of the convention
b. List of the rules for candidates
c. Voting record of candidates (where applicable)
d. Other candidate information at the discretion of the OEA-PAC Board
e. Candidate literature provided to the Center for Public Affairs by specified deadlines

All information, inquiries, requests for time on the agenda, and requests for distribution of materials will be cleared through the OEA Center for Public Affairs.

Delegate Registration
Local associations may register as many delegates as they choose; however, to receive materials and the planned luncheon, delegates must be registered at least fourteen days prior to the OEA-PAC Convention. They must also be contributing members of OEA-PAC. Only registered delegates will be seated in the delegate section at the convention.

Each local must register a chairperson and may register an alternate chairperson. Only the chairperson or the alternative chairperson may cast the votes for the association in those situations relating specifically to candidate recommendation, except in the case of a proxy vote.

Voting
1. Number of votes -- Each local association shall be provided a number of votes equal to the number of OEA-PAC contributors in that local as of June 30 immediately preceding the general election OEA-PAC Convention and January 1 immediately preceding the primary election OEA-PAC Convention. The number of contributors shall be computed by determining the total contribution from the association and dividing by five. For purposes of the OEA-PAC Convention, OEA-Retired shall be considered in the same manner as a local association.

In the event a local association does not agree with the number of votes allocated, it may appeal the matter to the OEA-PAC Board. Such appeals must include substantive information indicating its authorized vote was improperly computed.

2. Proxy voting -- In the event a local association cannot attend the OEA-PAC Convention, it may select a convention delegate from the same UniServ council as its chairperson to cast its proxy ballot, providing the president of that local has given written notice to the rules committee prior to the opening session of the convention. The Center for Public Affairs shall produce a proxy form and distribute it to all locals one month prior to the convention.

Late proxies will be accepted at the time of checking in at the convention. Proxies will not be transferred once assigned.

Candidates
1. Representation – Candidate viability shall be determined by OEA Center for Public Affairs staff, notwithstanding the provision under “Offices to be Considered for Recommendation” which states “Candidates not invited to the convention may address the convention upon a presentation to the chair of the signatures of 50 convention delegates and a completed candidates questionnaire.” All candidates must complete a candidate questionnaire.

All viable candidates for US President to be considered for recommendation shall be provided time when either the candidate or his/her authorized representative may appear before the
convention. Authorized representatives for candidates must be officially designated by the campaign and cannot be a candidate seeking the PAC Convention recommendation. This is only an option for presidential candidates.

2. **Lists available to candidates** -- The following lists will be provided all candidates ten business days prior to the OEA-PAC Convention:
   a. Local presidents
   b. Delegates as available
   c. OEA staff
   d. OEA-PAC Board of Directors

3. **Speaking order of candidates** -- Speaking order of candidates shall be determined by lot conducted by the OEA president’s office. Once determined, the order may be changed due to scheduling problems at the discretion of the OEA president.

4. **Candidate material at the convention**
   a. **Inside the convention room**
      i. All campaign materials distributed at the convention must include campaign identification.
      ii. Candidates will be allowed to place identified items on the chairs in the convention room before each day.
      iii. Candidates and campaign staff must be off convention floor 45 minutes prior to the start of the convention.
      iv. Buttons may be worn in the convention room.
      v. Candidates or their representatives may stand outside the doors to the convention room and hand out items as the delegates walk in before the start of the convention.
      vi. Candidates are not allowed to lobby delegates on the floor during the convention.
      vii. Candidates or their representatives are not allowed to conduct Power Point presentations inside or outside of the convention room.
   b. **Outside the convention room**
      Each candidate will be allowed to display two banners, each no longer than six feet. One piece can be displayed at the candidate's table, and the other piece can be displayed in the lobby and/or hallways, depending on hotel rules. Candidates will be asked to use recyclable paper. Non-latex balloons will be permitted. Video presentations may be made on or near the candidate's table.

5. **Candidate tables at the convention** -- Tables will be available for the candidates and their materials starting at 2 p.m. on Friday afternoon of the convention. Tables will be assigned based on results of a drawing held prior to 2 p.m.

6. **Candidate liaisons at the convention** -- Each candidate will be assigned an OEA-PAC Board host who will act as a liaison between the OEA-PAC Board and the candidate and his/her organization.

7. **Commitment to Positive Campaigning** -- The OEA-PAC board expects campaigns and candidates to adhere to these rules both literally and in spirit in their dealings with OEA and at the OEA-PAC Convention. To help the OEA-PAC Board enforce and encourage candidates to campaign in a positive manner, candidates and their lead staff must sign a positive campaigning commitment pledge that confirms that their campaign agrees to take all reasonable steps to ensure that staff,
volunteers, and supporters understand the OEA-PAC Convention’s positive campaign policy both in spirit and in action. This pledge is required to appear at the OEA-PAC Convention.

**Evaluation of Convention**
Evaluation forms will be sent to all registered delegates within 48 hours after the conclusion of the convention.

**Further Recommendations**
Following a primary election, the OEA-PAC Board may recommend where a recommendation is not presently in effect; however, the delegates may instruct if they do not wish to have further recommendation for a particular office.
**RULES AND PROCEDURES**
*(subject to adoption at the convention)*

**Rules Committee**
The Rules Committee shall consist of one OEA-PAC Board member from each congressional district and be chaired by the OEA-PAC Board vice-chairperson.

**Presiding Officers**
The presiding officers for the OEA-PAC Convention shall be the President of OEA and the Chair of the OEA-PAC Board. The OEA president shall chair the OEA-PAC Convention; the chair of the OEA-PAC Board shall serve as the vice-chair for the convention. The president shall be responsible for providing a parliamentarian.

**Candidate Speeches and Question and Answer Periods**
A candidate speech can be no longer than the designated time with additional designated time for questions and answers. The time left after a speech will be used for delegate questions and answers. Each question cannot exceed 30 seconds. Candidates will be allowed three minutes to respond to each question. Although the delegate who asked the original question may not ask follow-up questions, another delegate may seek recognition to ask a follow-up question.

In the event of a runoff, the final two candidates or their designees each will be allowed to answer questions from the delegates for up to ten minutes.

**Rules of Procedure and Debate**
1. In all matters not specifically covered by the rules of the convention, Robert's Rules of Order, Newly Revised, shall govern the procedures of the convention.

2. Only delegates and others authorized by the rules committee shall be allowed on the convention floor during any business session. In addition, only delegation chairs will be allowed in the designated voting area.

3. OEA staff will be permitted to discuss their views on the candidates with the delegates and may share relevant data including polling, fundraising, policy information that may inform the viability and fit of the candidates.

4. Each delegate shall be limited to three minutes for discussion on any topic and may not speak again until all others have been heard who wish to speak on the same motion. The time limit may be extended if approved by a two-thirds vote of the convention. A delegate wishing to speak shall not proceed until he/she rises, is recognized by the chair, gives his/her name and delegate status, and is directed to proceed.

5. Up to four speakers will be heard on behalf of each candidate and position of no recommendation. The order of speaking will be determined by the chair.

6. A delegate who has been granted the privilege of the floor may not yield any part of his/her time to another delegate.

7. A delegate speaking to a motion before the house may not move the previous question. A motion to close debate shall apply only to the motion currently before the house.
8. Debate on the candidates shall occur before the scheduled caucus.

9. Any delegate may call for a caucus; a majority vote of the delegates present shall determine if the convention will be recessed for caucus.

10. On any motion not covered by rule 5 above, debate shall alternate between pro and con as follows:

   • In the event no speaker wishes to be recognized in opposition to the first speaker, debate shall be closed except as follows.
   • If after the maker of the motion has been allowed to speak in favor of the motion, no speaker wishes to speak in opposition to the motion, one additional speaker in favor will be allowed.
   • After this, if there are still no speakers wishing to speak in opposition, debate will be closed.
   • If, however, after two delegates speak in favor, there is a speaker in opposition, debate will then continue, alternating between pro and con.

11. Notices for announcement to the convention shall be in writing, signed by the person under whose authority the announcement is issued, and be submitted to the chair of the convention.

12. Questions to the convention's parliamentarian may be directed through the presiding officer only.

13. Smoking is not permitted in the convention meeting areas or in the lobby area outside of the convention rooms.

14. Alcohol is not permitted on the floor of the convention.

Voting

1. Voting on procedural matters shall be by majority of those delegates in attendance and voting on the question. However, a weighted vote will be held at the request of the representatives of five different local delegations.

2. Votes for recommendation will be by roll call, electronic ballot or written ballot in an order to be determined by the presiding officers of the convention.

3. Votes cast by written ballot, electronic ballot or roll call vote may not be changed.

4. All locals will be listed according to congressional district.

5. Roll call votes will be done by local in alphabetical order.

6. On roll call votes for congressional recommendations, the delegates of the congressional districts will vote first when their candidates are being considered. This vote will be tallied and announced prior to the vote of the remaining delegates. This procedure does not apply to written or electronic ballots.

7. Locals may apportion their votes among their delegates and among the candidates in any manner they choose. Votes given must be in whole numbers.
8. In the event none of the choices on the candidate ballot obtains a majority of the convention’s delegate votes, the two candidates with the most votes and the choice of “no recommendation” will be forwarded to a second ballot. In the event none of the choices on the second ballot receives a majority vote, the candidate with the most votes and the choice of “no recommendation” will be forwarded to a third ballot.

**Dual recommendations** – A dual recommendation vote may be proposed to the convention delegates under rare circumstances, and only in an open seat. The dual recommendation procedure applies to candidates of different political parties only. The dual recommendation proposal must be presented in writing and contain compelling, issue-driven rationale. The rationale must also explain the unusual circumstances that would necessitate the use of the dual recommendation process. It will take place if a simple majority approves and then a ballot will be created to contain every possible dual combination.

Where a dual recommendation is granted in a congressional race, funding will be determined by the NEA Fund PAC criteria.

**General Operations**

A member registered as an alternate can, upon clearance by the registrar, be transferred from alternate to delegate at any time during business meetings. An alternate, once seated as a delegate, cannot be replaced by the original delegate until the next scheduled meeting break (lunch, recess of the session).

Members shall be required to wear the badge issued upon registration for admission to the meeting hall to facilitate identification and seating.

**Seating Arrangements**

Seating shall be arranged by UniServ Council and rotated each convention.

**Open Meetings**

All meetings at the convention shall be open to the press and, to the extent physical facilities permit, to any OEA members. If space is still available, members of the public are welcome.

**Non-candidate Activities**

1. **Initiative signature gathering** - Signatures may not be gathered for initiative campaigns at the convention unless approved prior to the convention by the OEA President and the OEA-PAC Board chair. Such approval shall be based on previously established positions of the OEA Board of Directors. Upon such approval, a table will be provided as space allows.

2. **Governance candidates** - Governance candidate tables are not allowed. The activities of OEA governance candidates shall be restricted to hospitality rooms.

3. **Tables allowed at the convention**
   - PAC table
   - OEA Foundation table
   - OEA-Retired table
   - Other tables as approved by the OEA-PAC rules committee, the OEA-PAC Board Chair and the OEA President.
   - Initiative table upon approval (see “1. Initiative signature gathering” above).