

OEA
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PUBLIC SCHOOL
EDUCATORS
AND **STUDENTS**



MAKE YOUR VOICE HEARD

OEA Fund
Reorganization Info-
Session For:
OEA AE | OEA Retired

Presented by:

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OEA UniServ Political Advocacy Consultants

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Introductions
Please Share:
Name | LEA | Role

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Presentation Overview

Presentation Overview

- OEA Fund Reorganization Meetings
- OEA Fund State Convention
- OEA Fund State Council
- Candidate Screening & Recommendation Process
- Next Steps



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OEA Fund Reorganization Process

OEA Fund Reorg. Process

Per the OEA Fund Constitution & Bylaws, the governance make up of the OEA Fund must be reset between Oct. 15h and Dec. of every odd-year.

Reorganizing the Fund allows for a recalibration of local leaders to serve in different capacities throughout our candidate screening and recommendation process.

The reorg events are the starting point where members go about the work of formalizing our candidate interview teams, questions, process, and endorsements for the following even-year election.



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OEA Fund Reorg. Process

Per the OEA Fund Constitution & Bylaws, the governance make up of the OEA Fund must be reset between Oct. 15th and Dec. 31st of every odd-year.

Core Functions of the OEA Fund Reorg Process

- Select OEA Fund District Chairs and Vice Chairs
- Select OEA Fund State Convention Delegates & Delegate Alternates

Role of the District Chair & Vice Chair

- Provide Advice on Friendly Incumbent Designation
- Help recruit participants to the District Screening Committees
- Helps organize in-district Legislative Advocacy

Role of the OEA Fund Delegate

- Vote on State Council Recommendations
- Vote for Candidates to State Council
- Approve amendments to C&B



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Reorganization Process

The only individuals permitted to participate in the OEA Fund Reorg Process are LEA Presidents or their designees, OEA District DSC members, CCT members, and assigned OEA-R and OEA AE set by those respective boards.

Affinity Group Participation

- OEA-R and OEA-AE are the only two OEA affinity organizations permitted to participate in the OEA Fund Reorg Process
- They appoint members to serve as liaisons for each OH HD and OH SD

Reorg Vacancies to Fill

- All OEA Fund Reorg attendees may run for one of the following positions:
 - OEA Fund State Convention Delegate or Alternate
 - HD or SD Committee Chair or Vice Chair



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Reorganization Process

Filling Vacancies Following Reorganization Meeting:

Vacancies of OEA State Fund Convention Delegate and HD/SD Chair and Vice Chair not filled at the reorganization meeting will be appointed by OEA District Leadership in consultation with their local association presidents and if needed, multiple local association designees.



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Reorganization Process

OEA AE and OEA-R Advisory Councils are responsible for identifying and appointing their members to serve as liaisons to Ohio's HDs and SDs.

OEA Affinity Group Reorg Participation Guidelines:

- OEA AE and OEA-R members may participate at an OEA Fund Reorg event
- An affinity group liaison must be assigned to their district to participate
- Appointments can be made on a rolling basis by each group's advisory council
- Affinity Group liaisons may serve as a District Chair/Vice-Chair, Delegate/Alternate



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**OEA Fund
Reorganization Events**

OEA Fund Reorg. Events

All events can be found on www.mobilize.us/ohea

- Wednesday, November 1st 2023: South Eastern OEA
- Thursday, November 9th 2023: East Central OEA
- Monday, November 20th 2023: North Eastern OEA DSC 2
- Tuesday, November 21st 2023: North Central OEA
- Tuesday, November 28th 2023: Capital & Central
- Wednesday, November 29th 2023: Eastern OEA
- Monday, December 4th 2023: North Eastern OEA DSC 1
- Tuesday, December 5th 2023: North Eastern OEA DSC 3
- Tuesday, December 5th 2023: South Western OEA
- Monday, December 11th 2023: Western OEA
- TBD: NWOEA



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OEA Fund State Convention

OEA Fund State Convention

The Convention is essentially the Representative Assembly of the OEA Fund.

Role of a Delegate

Delegates to the OEA Fund State Convention play an important role in the following decisions related to the operation of the OEA Fund:

- Reviewing and confirming endorsement recommendations from the OEA Fund State Council for candidates running for:
 - Governor, AG, SoS, AoS, ToS, Ohio Supreme Court
- Elect the District Association Members of the OEA Fund State Council
- Consider and approve/reject amendments to the OEA Fund C&B
- Help kick off OEA's political agenda for major election years

Convention Dates

- Spring - Tentatively set at the end of Q1 in 24
- Fall - Projected for late in Q3 in 2024



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OEA Fund State Council

OEA Fund State Council

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Council Members

- OEA Officers:
 - President | Vice President | Secretary Treasurer serve as the:
 - Chair | Vice Chair | Secretary Treasurer of the Council
- District Association Members elected by the OEA Fund Convention
 - NEOEA has 3 Representatives/Alternates
 - 1 member with a 4-year term
 - 2 proportional members w/ a 2-year terms
 - Central has 2 Representatives/Alternates
 - 1 member with a 4-year term
 - 1 proportional member w/ a 2-year term
 - All other Districts have a 1 Rep/Alt



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OEA Fund State Council

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Council Members

- OEA-R
 - One (1) OEA-Retired Member and Alternate, elected by the OEA-R Advisory Council, 2-year term
- OEA Board of Directors
 - Two (2) Members and Alternates elected by the OEA BoD, 2-year term
- OEA Staff
 - Ex-officio members of the council
 - OEA Executive Director
 - OEA Manager of Government Relations



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OEA Fund State Council

The State Council set the policies around OEA's candidate screening and endorsement, OEA Fund contribution, and OEA Fund fundraising strategies.

Screening & Endorsement Guidelines

- Shaping/influencing candidate screening process for G.A. and S.B.O.E.
- Approving all candidate questionnaires for Statewide, Supreme Court, G.A. and S.B.O.E.

Review/Approving Contributions from the OEA Fund

- State Council has granted OEA Leadership and Staff the discretion to make contribution recommendations to elected officials or political committee up to \$5,000.00 each cycle (primary or general election) without State Council approval.
- Contributions above \$5,000.00 are required



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OEA Fund State Council

The State Council set the policies around OEA's candidate screening and endorsement, OEA Fund contribution, and OEA Fund fundraising strategies.

Fundraising Strategies

- The OEA Fund State Council also helps guide OEA Fund fundraising strategies by reviewing and providing input and feedback on OEA's annual fundraising plan(s).

Amending the OEA Fund State Council C&B

- The OEA Fund State Council can also recommend amendments to the OEA Fund Constitution & Bylaws for the Convention's consideration
- Usually, the State Council establishes an Ad Hoc Committee to review and recommend amendments to specific sections of the OEA Fund C&B



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Screening & Recommendation Process

Screening & Recommendation

The 2024 Screening & Endorsement Guidelines have not yet been set and will be determined by the OEA Fund State Council prior to the 2024 cycle

District Screening Committee Consists of:

- Local Association Presidents or their Designee
- OEA Affinity Group Liaisons: From OEA-R | From OEA AE
- OEA District Screening Council - Chair of Council Chairs the Screening



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Screening & Recommendation

Individual legislative screening committees are comprised of the following individuals across the OEA Membership.

Local Association/Alternates

- Minimum of 1% of a district must sit in a legislative seat to be eligible
 - Set by OEA Computer Services Dept.
- A local may send a designee

Affinity Group Liaisons: OEA-R | OEA AE

- Per the OEA Fund C&B, OEA-R and OEA-AE may appoint one member per legislative district to represent their members at a candidate screening
- Liaisons do not need to live/work/study in their assigned district



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Screening & Recommendation

Individual legislative screening committees are comprised of the following individuals across the OEA Membership.

OEA District Screening Council

- Appointed by OEA District Association; appointment includes DSC Chair, Members of the DSC, Alternates
- Every District has at least 1 DSC
- NEOEA has 3 - due to membership
- Central has 2 - due to membership



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Screening & Recommendation

It is essential that all OEA Members understand how and why we screen candidates. Our simple process puts our members and their students front and center in our assessment of candidates running for public office.

OEA Candidate Questionnaire

- Focuses narrowly to questions pertaining to public education and organized labor issues in Ohio
- New questionnaire each year that are approved by the OEA Fund State Council
- Optional for candidates to fill out but can guide the conversation during the interview



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Screening & Recommendation

A candidate **MUST** screen with OEA members to be eligible for endorsement.

OEA Candidate Interview Process

- Purpose is to build a relationship between candidates and members of the District Screening Committees and LEAs within the legislative district.
- OEA GR, with the approval of the OEA Officers, will provide a district profile that contains the political make-up of the district, important info about an incumbent's voting record, their willingness to work with OEA members and staff on legislative issues, and a recommendation for endorsement decision by the Screening Committee

Best practice: Same screeners ask the same questions of all candidates. You can also ask questions about a candidate's competitiveness and chances of winning.



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Screening & Recommendation

A candidate **MUST** screen with OEA members to be eligible for endorsement.

Rendering a Candidate Screening Outcome

- The DS Committee recommends an endorsement position to the OEA Fund State Council for its concurrence. Their options include:
 - Endorsement
 - No Position
 - No Endorsement (requires a unanimous vote by the DS Committee)
- Most times, the State Council automatically concurs, however, there is a potential that a recommendation could be reviewed, and the SC, could make the choice to vote to set the position of a given race only to No Position.



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Screening & Recommendation

Friendly Incumbent Designation

- If elected officials have a positive voting record, have previously screened with an OEA DS Committee, and have been endorsed in their previous election, and are not running for a new seat, they are eligible for a friendly incumbent endorsement, subject to approval by the OEA Fund SC.
 - New seat defined as: running for the Ohio Senate from the Ohio House
- OEA HD/SD Chairs or DS Council Chairs will be consulted prior to a recommendation for a friendly incumbent endorsement. If they do not concur, the district will be screened before their DS Committee.



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Screening & Recommendation

Representation from your local is the best way to lift up unique issues of priority or concern while interviewing candidates.

The Value of Participation

- You help choose questions ask of candidates
- Your member's experience is unique - who else can share that with a candidate/potential officeholder than you?
- The interview process is the jumping off point for engagement with potential officeholders heading into the following General Assembly
- Designees who are passionate about advocacy are great people to empower in this process



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