
STRONG
 **UNION
SCHOOLS
COMMUNITY**
DELEGATE ASSEMBLY **22**

May 6 - 7, 2022

Joseph H. Thomas, President
602-264-1774 • 800-352-5411

arizonaea.org

AFFILIATED WITH THE NATIONAL EDUCATION ASSOCIATION

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2022 AEA DELEGATE ASSEMBLY PROGRAM

Friday, May 6, 2022

9:30a-4:00p AEA-Retired Annual Meeting, Pueblo Ballroom

10:00a-2:00p AEA Board of Directors' Meeting, Board Room

3:00-4:00p AEA-Retired Caucus, Pueblo Ballroom

4:00p Delegate Registration, Coronado Link / Sunset Plaza Loggia

4:30p Regional Caucuses, see Event Schedule

6:00p **First Business Meeting**, Joe Thomas, AEA President presiding

Call to Order

Opening Ceremony

Opening Blessing, Pastor Warren Stewart

Land Acknowledgement

Pledge of Allegiance, Mrs. Fisher's Flamingos Class

National Anthem, Mimi Borders, Cocopah Jazz Choir

Welcome, Becky Williams & Keri Blaker

Introduction of the 2021-2022 AEA Board of Directors

Credentials Report

Kelly Trujillo, Elections Committee Co-Chair

Amendments to Standing Rules

Adoption of Program

Compliance Review Report

Steve Adams, Compliance Review Committee Chair

Carlos Robinson, Compliance Review Committee Co-Chair

AEA Board of Directors Nominations

Joe Thomas, AEA President

Proposed Constitution and Bylaw Amendments

Joe Thomas, AEA President

Statewide Candidate Speeches

Joe Thomas, AEA President

Arizona Legislator Welcome

Joe Thomas, AEA President

Delegate Engagement

Joe Thomas, AEA President / Marisol Garcia, AEA Vice President

AEA Fund for Public Education

Marisol Garcia, AEA Vice President, and Special Guest, Senator Martin Quezada

9:00p Recess

Special Interest Caucuses

*Special Interest Caucuses will meet 30 minutes after the Delegate Assembly

2022 AEA DELEGATE ASSEMBLY PROGRAM

Saturday, May 7, 2022

7:00a Regional Caucuses, see Event Schedule

7:00a-10:00a Polls open for Voting, Arizona I Room

9:00a **Second Business Meeting**, *Joe Thomas, AEA President presiding*

Call to Order

Credentials Report

Kelly Trujillo, Elections Committee Co-Chair

Consideration of New Business

Joe Thomas, AEA President

Annual Report Review

AEA Committee / Task Force Chairs

Marisol Garcia, AEA Vice President

AEA President Address

Joe Thomas, AEA President

Treasurer's Report

Angela Philpot, AEA Treasurer

Elections Report

Kelly Trujillo, Elections Committee Chair

11:50a **Recess**

12:00p-2:00p **Lunch**

2:00p *Deadline for submission of New Business Items per Standing Rule 5.11*

2:15p **Third Business Meeting**, *Marisol Garcia, AEA Vice President presiding*

Call to Order

Arizona Teacher of the Year

Nancy Parra-Quinlan, Mesa Education Association

Marisol Garcia, Vice President

AEA Foundation for Teaching & Learning

Marisol Garcia, AEA Foundation President

Consideration of New Business

Marisol Garcia, AEA Vice President

Diversity Celebration

Christy Sainz, Ethnic Minority Leadership Task Force Chair

Executive Director Address

Randy Parraz

Consideration of the Legislative Platform

Michael McGowan, Government Relations & Legislative Action Chair

Katie Nash, Government Relations & Legislative Action Co-Chair

AEA Guest Speaker

Special Guest

Consideration of Resolutions

Gretchen Clifton, Resolutions Committee Chair

Megan McCave, Resolutions Committee Co-Chair

Presentation of the 2022-2023 AEA Board of Directors & AEA Fund Council

5:00p Adjournment

STANDING RULES OF THE AEA DELEGATE ASSEMBLY

In continuing force under Constitution Article VII, Section 7

1.0 CREDENTIALS

- 1.1 A credentials subcommittee of the Elections Committee shall examine the credentials of delegates when necessary and recommend to the Delegate Assembly the acceptance or the rejection of persons whose credentials are not in order.
 - a. The subcommittee shall interpret the membership requirements for delegates when asked to do so.
 - b. The chairperson of the credentials subcommittee or his/her designee shall make a credentials report to the President and/or the delegates when called upon concerning matters under the jurisdiction of the credentials subcommittee.

2.0 REGISTRATION

- 2.1 Designated persons on the AEA staff shall supervise the registration procedure at the Delegate Assembly.
- 2.2 Delegate registration shall commence on the first day of the annual meeting.
- 2.3 Delegates shall present temporary credentials. They shall receive permanent credentials and voting badges at the registration desk.
- 2.4 Delegates who do not present temporary credentials shall follow the procedure specified in the AEA election guidelines.

3.0 SEATING

- 3.1 Duly accredited delegates shall wear their permanent credentials in order to be seated in the voting section for business meetings.
- 3.2 There shall be no smoking on the floor of the assembly.
- 3.3 The seating of the local delegations shall be rotated each year.
- 3.4 Cell phones, pagers, and other communication devices shall be set so that they do not ring or sound during sessions or meetings of the Delegate Assembly.

4.0 ORDER OF BUSINESS AND DEBATE

- 4.1 The first items of business at the initial meeting of each Delegate Assembly shall be the adoption of the credentials report, amendment of rules, and adoption of program.
 - a. The standing rules adopted by the Delegate Assembly shall be in effect until amended or suspended by the same or a subsequent Delegate Assembly.
 - b. A standing rule may be amended or suspended by a 2/3 vote of those present and voting.
- 4.2 There shall be an official parliamentarian. Questions shall be directed to him/her through the presiding officer.
- 4.3 The privilege of making motions, debating or voting shall be limited to duly accredited delegates in the voting section.
- 4.4 No delegate shall address the assembly without first being recognized by the chair.
- 4.5 A delegate shall give his/her name and local association when addressing the chair.
- 4.6 No delegate shall speak from the floor for more than three minutes at one time to any question under discussion, nor more than twice to the same question without the consent of the assembly.
- 4.7 Nonprocedural motions and amendments shall be written and presented to the presiding officer as soon as they have been made.

STANDING RULES OF THE AEA DELEGATE ASSEMBLY

In continuing force under Constitution Article VII, Section 7

- 4.8 Delegates attending business sessions shall remain seated until the meeting is adjourned, except while waiting to use a microphone.
- 4.9 Only announcements concerning the assembly program, procedural matters and emergencies shall be made from the platform.
- 4.10 Requests for privileged recognition shall be verified by the microphone monitors.
- 4.11 After the maker of the motion speaks to the motion, the chair shall recognize speakers, attempting to alternate between pro and con, in the order they are received. The chair may entertain a motion to close debate if all remaining speakers represent one side of the debate.
- 4.12 The motion to close debate shall not be in order prior to the opportunity for one pro and one con speech on a debatable motion.

5.0 RESOLUTIONS, NEW BUSINESS, LEGISLATIVE PLATFORM AND AMENDMENTS

- a. The Report of the Resolutions Committee, as adopted by the Delegate Assembly, shall be a statement of the positions of the Association.
 - b. Resolutions are formal expressions of opinion, intent, belief or position of the Association. They shall set forth general concepts in clear, concise language, shall be broad in nature and shall state the positions of the Association positively.
An example of a resolution: The AEA urges that teachers be assigned only to instructional responsibilities for which they are qualified by preparation and certification.
 - c. New business items express the will of the Delegate Assembly on matters which relate to the operation of the Delegate Assembly or programs of action for the Association. They are specific in nature and terminal in application.
An example of new business: The Board of Directors is directed to develop an affirmative action plan for presentation to the 1982 Delegate Assembly
 - d. The Legislative Platform is adopted by the Delegate Assembly and includes: a statement of purpose, a statement of legislative philosophy and goals, and a statement of legislative objectives.
An example of a legislative platform item: To provide for participation in the establishment of professional standards and practices to ensure certified personnel instructing in classrooms.
 - e. Standing rules are the adopted procedures for the operation of the Delegate Assembly.
- 5.1 A Resolutions Committee, appointed according to Article VII, Section 6 of the Constitution and Bylaws, shall present resolutions and new business to the Delegate Assembly.
 - 5.2 The Resolutions Committee shall begin preparing its report by January. Resolutions should be submitted early to receive full consideration. Resolutions received less than 50 days before the Delegate Assembly shall not be considered in its proposed report. Proposed resolutions may be submitted by a local association, an individual member, an AEA committee, an AEA recognized caucus, or the AEA Board of Directors.
 - 5.3 Proposed amendments to the Constitution and Bylaws must be received by the Resolutions Committee in writing at least 60 days before the vote will be taken and presented to the membership at least 30 days before the vote will be taken.
 - 5.4 Proposed resolutions, amendments to the standing rules and new business items shall be received by the Resolutions Committee no later than 50 days before the Delegate Assembly in order to be distributed to the delegates and presented at the pre-Delegate Assembly regional caucuses.
 - 5.5 Proposed resolutions, new business items, legislative platform and amendments shall be submitted on forms provided by the Association.

STANDING RULES OF THE AEA DELEGATE ASSEMBLY

In continuing force under Constitution Article VII, Section 7

- 5.6 The Resolutions Committee shall prepare a proposed comprehensive categorized resolutions statement which shall be distributed to members before the pre-Delegate Assembly regional caucuses. The committee shall use the adopted resolutions from prior years and submitted resolutions in preparing their statement. The committee has the power to originate resolutions and edit, consolidate, revise or reject submitted resolutions. The format of the proposed resolutions shall show both the current and the proposed language for any proposed reversals of positions adopted by a prior Delegate Assembly.
- 5.7 The committee shall notify the sponsor of a submitted resolution of the action taken by the committee prior to the regional hearings.
- 5.8 The Resolutions Committee shall, upon written request, present its proposed statement at the pre-Delegate Assembly caucuses.
- 5.9 At the Delegate Assembly, the Report of the Resolutions Committee may be amended before adoption. Amendments involving the addition of more than five (5) words shall be submitted in writing on the Delegate Assembly Submission form to the chair before being moved.
- 5.10 Amendments to the Resolutions Statement submitted not less than two hours prior to the time specified for consideration of the Resolutions Statement in the program adopted by the Delegate Assembly shall be printed and considered by the Delegate Assembly before non-printed amendments to the Resolutions Statement.
- 5.11 All new business items to be considered by the Delegate Assembly shall be submitted prior to 2:00 p.m. on the second day of the Delegate Assembly.
- 5.12 Items of new business submitted in accordance with this section shall be the first business item in at least two business meetings of the Delegate Assembly, and these new business items shall be considered for at least one (1) hour.
- 5.13 All AEA statewide association events, such as marches, rallies, demonstrations or similar activities that are proposed and passed by the AEA Delegate Assembly will be referred to the AEA Board of Directors for review and implementation approval.
- 5.14 The Resolutions Committee shall edit the resolutions document after the Delegate Assembly to reflect any changes made in the Constitution and Bylaws.
- 5.15 The Government Relations and Legislative Task Force shall edit the Legislative Platform after the Delegate Assembly to reflect any changes made in the platform.

6.0 NOMINATIONS

- 6.1 A Nominations Sub-committee of the Elections Committee shall solicit candidates for a position, when necessary. The committee shall inform members of positions coming up for election and aspects of campaigning therefore.
- 6.2 Members planning to seek a position may file with the Executive Director of the AEA a campaign statement of up to 250 words and a photograph. Forms are available from the AEA office.
- 6.3 The Executive Director of the AEA shall publish in an AEA publication and/or in delegate materials the campaign statement and the photograph submitted by each candidate who filed by the deadline.
- 6.4 The deadline for receipt of candidate data for publications shall be set by the Elections Committee in consultation with AEA staff.
- 6.5 Nominations shall be taken from the floor. If the number of candidates nominated is equal to or less than the number of positions to be filled, the chair shall declare such candidates elected.

STANDING RULES OF THE AEA DELEGATE ASSEMBLY

In continuing force under Constitution Article VII, Section 7

- 6.6** Nominees for statewide positions shall each be given five (5) minutes to present their qualifications. Candidates, or their designee, shall speak in an order determined by a drawing. No nominating or seconding speeches are allowed. Nominees for regional positions shall be given an opportunity to speak at regional caucuses.

7.0 ELECTIONS

- 7.1** The Elections Committee shall assure fair and honest elections at the assembly.
- a. The committee shall conduct the elections for officers, regional directors, alternate directors, NEA state directors, NEA alternate state directors and members-at-large as provided by the Constitution and Bylaws and provide for voting on amendments to the Constitution and Bylaws.
 - b. The committee shall provide all ballots and other materials as required.
- 7.2** Ballots shall be prepared after nominations for all positions are formally closed and after all amendments to the Constitution and Bylaws have been introduced.
- a. The ballot shall be approved by the chairperson of the Elections Committee and the AEA President. The abbreviated form of proposed constitutional amendments shall be approved by a representative of the sponsor and/or the AEA President. Adequate provisions shall be made for write-in candidates.
- 7.3** Voting delegates shall be required to provide their credentials in order to receive a ballot. To the reasonable extent possible, all election procedures shall conform to procedures used in conducting governmental elections.
- 7.4** Prior to the beginning of the balloting, the Elections Committee shall:
- a. inspect all materials and equipment
 - b. assign committee members to function as an inspector of credentials who shall supervise the signing of a register.
- 7.5** The chairperson shall assist any operation where his/her services are needed.
- 7.6** The polls shall be open prior to noon during the final day of the assembly at a place designated by the President.
- 7.7** Upon the closing of the balloting the Elections Committee shall:
- a. count and verify remaining unused ballots, signatures, and spoiled ballots.
 - b. Count all ballots cast and accurately account for materials issued and used. Arizona state election laws shall apply in the event of any accounting discrepancy in the ballots.
 - c. be responsible for the tallying of the ballots. The committees may contract for computer assistance for the actual ballot counting.
 - d. Verify write-in candidate(s) eligibility in the election.
 - e. perform an immediate recount of ballots for an office when the difference between the top two candidates is one percent (1%) or less for statewide office or two votes or less for an AEA regional office.
 - f. perform an immediate recount of ballots for an amendment to the AEA Constitution and Bylaws when the difference between passage or failure is one percent (1%) or less of the votes cast.
- 7.8** Election results shall remain secret until called for by the AEA President.

STANDING RULES OF THE AEA DELEGATE ASSEMBLY

In continuing force under Constitution Article VII, Section 7

8.0 CAMPAIGN MATERIALS / ACTIVITIES

- 8.1 No campaign literature or posters for elections to be held at the Delegate Assembly shall be displayed or distributed in the Delegate Assembly room.
- 8.2 No campaign activity shall occur within fifty (50) feet of the polling place while the polling place is open.
- 8.3 Candidates shall not schedule campaign meetings/rallies during the business sessions of the Delegate Assembly.
- 8.4 No posters, handbills or similar materials shall be attached to walls or glass at or near the assembly site except as the Elections Committee may announce.
- 8.5 Candidates shall be responsible for removal and clean-up of all campaign materials prior to the conclusion of the Delegate Assembly.
- 8.6 Neither the AEA nor any local association shall contribute any dues money or anything else of value to a candidate or a candidate's campaign.
- 8.7 No candidate shall assist the elections committee in the conduct of an election in which he/she is a candidate.
- 8.8 Candidates for all AEA executive offices shall submit a campaign finance report to the AEA Elections Committee within 60 days of the adjournment of the AEA Delegate Assembly. The report will include all income and expenditures related to the campaign.

9.0 DISTRIBUTION OF NON-CAMPAIGN MATERIALS

- 9.1 No materials, printed or otherwise, shall be distributed on the grounds of the assembly site without the permission of the AEA Board of Directors or the Executive Director.

10.0 OFFICIAL STATEMENTS

- 10.1 Only the AEA President, Executive Director or Public Relations Director shall make official statements representing the AEA. This does not restrict delegates from speaking as individuals during interviews concerning the assembly.

2022 COMPLIANCE REVIEW REPORT

REPORT

The Compliance Review Committee met several times to monitor membership representation figures for both the NEA Representative Assembly election districts and the AEA Board of Directors Governance Regions. Based upon the January 15, 2021 membership figures, the AEA now has 16,728 active members. The average number of members per regional director is 984. The AEA has 13 regions with 17 regional directors. There are 25 members on the AEA Board of Directors, which include 3 state officers, 1 NEA State Director, 1 Retired Director, and 3 Education Support Professional At-large Directors.

The NEA requires that all voting members of the AEA Board of Directors comply with the principle of one person-one vote. The AEA Board of Directors uses a weighted vote which complies with the principle of one person-one vote. Each Regional Director has a vote equal to the percentage of deviation from the average number of members for that region. Directors elected at-large have a weighted vote of 100.

RECOMMENDATIONS

The Compliance Review Committee recommends no change to AEA governance regions or local association assignments within the AEA Board of Directors governance regions.

REGIONAL DEVIATION FIGURES

Based on January 15, 2022 membership

<u>Region</u>	<u>2022 Membership</u>	<u>2022 Weighted Vote per Director</u>	<u># of Directors</u>
01	1067	108	1
02	1556	79	2
03	1461	74	2
04	2182	106	2
05	1810	92	2
06	1207	123	1
07	1324	135	1
08	1131	115	1
09	880	89	1
10	1184	120	1
11	1070	109	1
12	760	77	1
13	1187	121	1
	Regions between 11-19%		
	Regions between 20-29%		
	Regions 30% and over		
	Range of members per director		731-1324
	Range of weighted vote		74-135

2022 AEA Board of Director Candidates

AEA President, 3-year term



Marisol Garcia

AEA Delegates, I am proud to be a formal candidate for the office of President of the Arizona Education Association, the largest member led union in our state.

Members and Delegates, Our time is now!

We can no longer allow misguided political agendas keep us from joining together in solidarity to demand strong communities and strong schools.

We are on the precipice of a new movement demanding equity in education, labor union strength, as well as women and BIPOC rights in Arizona.

Our union needs to move quickly and act now.

We need lay out our collective aspirational goals for the children of our state and the public schools they attend.

What does that look like?

- It looks like site and district led actions that call for safe and just schools for every Arizona staff member and student.
- It looks like grassroots organizing in coalition with our allies to push back against anti-educator rhetoric and policies.
- It looks like investments by our union to build long lasting powerful relationships.
- It looks like publicly calling out and holding accountable those who are intent on destroying public schools.
- It means demanding equity in each and every one of our classrooms and worksites, so that every child has an opportunity reach their goals.
- It means safe working conditions and job security for every member of our school community.
- It means fighting for a THRIVEABLE wage for every school employee.
- I humbly ask for your vote.

¡Que Viva AEA!

Strength in Numbers, Marisol Garcia

Address: 2515 E. Alta Vista Rd Phoenix, AZ 85042

Work Phone: 602-826-5270

Home Phone: 602-826-5270

Local Association: IDEA

Education Position: 8th Grade Social Studies Teacher

Years Employed: 15

Total Years of Education Employment: 16

Total Years as a AEA Member: 15

Total years as a NEA Member: 16

Higher Education Degrees Held: B.A Political Science, University of CA San Diego
Post-Baccalaureate/ Secondary Education, San Francisco State University

Elective Positions held in local, state and/or national education associations:

Vice President, AEA 6 years
Board of Directors, Region 6 AEA 6 years
Isaac District Education Association, President 7 years

Appointive positions held in local, state and/or national education associations:

NEA, Racial Justice in Education, Language Seat Holder 2 years
NEA, A new Vision for Accountability Task Force, 2 years
AEA, Chair, Legislative and Government Relations Task Force 5 years

Non-education positions held:

National Co-Chair, Educators for Joe Biden 2020
Executive Committee At Large Member, DNC 2020-2024
Deputy Secretary of State, State of CA 2002-2004

AEA Vice President, 3-year term



Vanessa Jimenez

In my years of experience working and volunteering in education, I have learned that a “one size fits all” model almost never works. I have learned that, just like our

students, we must meet our members where they are and support them in the ways they feel most comfortable. We continue to grow our membership by being innovative and by helping every educator find their why and the importance of sharing it. As a public-school parent for 20 years and servant leader for over 26 years I know that we can’t continue to do things because “that’s the way its always been done”. As your Vice President I want to use my experience from time spent both in and out of the classroom, as a

neighborhood leader fighting gentrification in a historic area, and as a state and national director to serve you, my colleagues, on the challenges that matter most to you. Getting to know what supports you need and the resources that will build up OUR association and locals and accessing them. Some of my top priorities are working on language; policies and procedures that build strong locals and connect resources that will benefit our schools and communities. Education in Arizona must be a priority, it starts with lifting up the voices of the educators that fight every day for our students and this can only be done by empowering them to do so, walking side by side and leading the way. I want to lead the way.

Address: 201 N. 10th Street, Phoenix, AZ 85034

Work Phone: 602-434-0252

Home Phone: 602-264-3105

Local Association: PHX Union High School District Classified Em

Education Position: Classified PD Coordinator, High School/ Adult Learning

Years Employed: 26

Total Years of Education Employment: 26

Total Years as a AEA Member: 19

Total years as a NEA Member: 19

Higher Education Degrees Held: Associate of Applied Science, Level I and Level II Addictions and Substance Abuse Certifications

Elective Positions held in local, state and/or national education associations: President PSU CEA, 2019

AEA ESP At-Large Director, 2017

Appointive positions held in local, state and/or national education associations: NEA ESP At-Large Director, 2021

Non-education positions held: City of Phoenix Neighborhood Quality Technical Advisory Committee, 2018;
President of Historic Booker T. Washington Neighborhood Association, 2018

ASSOCIATION GOVERNANCE



Katie Nash

My name is Katie Nash and I am running to be your next AEA vice president. I am a Biology teacher and president of Chandler Education Association. Within AEA, I am the co-chair of the Legislative Task Force and serve as the Region 8 alternate on the AEA Board, but most importantly, I am a proud mom of two amazing daughters in public school. They are my why.

We must acknowledge our past to carry out a vision that meets the pressing needs of this moment. One that sets the foundation for a powerful AEA that no legislator will ignore. We will go on the offense and set the agenda for public education and through our actions, membership, and strategy we will have the power to deliver it. Together we must elect politicians who work for public education, our students, and for us. We must be a member driven organization where all diverse voices are heard and respected. Through our collective voice, we will fight to ensure that all students have a fully funded, equitable public education.

By building trusting relationships and centering our interest in what's best for students, we can reach a common ground. During these difficult times, we must work together with our members, school staff, and communities to push back against the anti-public education narrative.

I look forward to working with all of you as we move our union forward and I hope to earn your vote for AEA Vice President. Together, we are Union Strong.

Address: 3305 E Morning Star Lane, Gilbert, AZ, 85298

Work Phone: 480-812-7855

Home Phone: 585-721-8933

Local Association: Chandler Education Association

Education Position: Science Teacher, Biology/ High School

Years Employed: 8

Total Years of Education Employment: 16

Total Years as a AEA Member: 8

Total years as a NEA Member: 8

Higher Education Degrees Held: BS - Health and Exercise Science, MSEd - Secondary Education (Science)

Elective Positions held in local, state and/or national education associations: Chandler EA President, 3 years

AEA Board of Directors - Region 8 Alternate, 1 year

NEA Representative Assembly Delegate for Region 8, 1 year

Appointive positions held in local, state and/or national education associations: AEA Legislative Task Force Co-Chair, 2 years

AEA COVID Task Force, 1 year

AEA RedforEd Task Force member, 1 year

Non-education positions held: Mom to 2 amazing daughters, 12 years; Volunteer for local, state and national campaigns, 6 years



Angela Philpot

As an active union member for my entire 24-year education career, I would be proud to earn your vote as our next AEA Vice President. I began as a local

president representing certified and classified members. We were an AEA Local of Distinction under my leadership, which led me to serving on the AEA Board of Directors. I was then elected AEA Treasurer and have six years of experience overseeing two vital AEA committees, as well as our overall AEA budget of \$7.7 million. I have been the lead treasurer for all NEA state affiliates proudly representing Arizona.

Our union needs leaders who have been at the forefront of our current education issues. Not only have I been leading as one-third of our AEA officer team, but I have been teaching in our schools at every level during this pandemic. I have the experience of being a certified and classified employee as well as teaching experience K-12+. As an Arizona native from the rural mining town of Globe-Miami, I also have strong union roots in labor.

With racial and social justice issues becoming more prevalent in our schools, my graduate degree in Equity Education as well as being a teacher of color teaching predominantly students of color, allows me to be an authentic voice leading these important conversations that impact a significant percentage of Arizona's public school students.

I am thoroughly prepared to be the next AEA Vice President and I would be honored to have your vote.

Address: 11151 East Sebring Avenue, Mesa, AZ 85212

AEA Locals in Compliance

As of March 1, 2022, the following local associations have on file a constitution and bylaws that meet the affiliate standards of the Arizona Education Association and the National Education Association.

Balsz	Cave Creek EA	Florence EA	Madison Dist CTA	Sahuarita EA
Chino Valley EA	Chandler EA	Flowing Wells EA	Marana EA	Santa Cruz Valley EA (#35)
Grand Canyon EA	Chinle EA	Fountain Hills EA	Marana ESP	Scottsdale EA
Miami Area EA	Clarkdale-Jerome EA	Ft Huachuca EA	Maricopa EA	Scottsdale SPA
Stanfield EA	Colorado River EA	Gadsden EA	Mesa EA	Sierra Vista Unified EA
Tuba City UnifEA	Combs EA	Gilbert EA	Mesa ESPA	Sunnyside CEA
Yuma Union EA	Continental EA	Glendale Elem EA	Mingus Union EA	Sunnyside EA
Aea - Retired	Coolidge EA	Glendale Union EA	Nogales ESPA	Tempe Secondary EA
Agua Fria Dist EA	Cottonwood Oak Creek EA	Higley EA	Osborn EA	Tolleson EA
Alhambra Dist EA	Cottonwood Oak Creek EA	Holbrook EA	Osborn EA	Tolleson UHSD EA
Amphitheater EA	Crane EA	Humboldt EA	Page EA	Tucson EA
Apache Junction EA	Creighton EA	Isaac Dist EA	Paradise Valley EA	Vail EA
Buckeye Assn of Sch Empl-UHS	Deer Valley EA	Kayenta EA	Paradise Valley SEA	Washington Dist EA
Buckeye EA	Deer Valley ESPA	Kingman EA	Peoria EA	Willcox EA
Cartwright EA	Douglas EA	Kyrene EA	Phoenix Day School	Williams EA
Casa Grande EA	Dysart EA	Kyrene Espa	Phoenix Elem CTA	Wilson Elem CTA
Casa Grande Elem EA	Dysart EA	Lake Havasu City EA	Phoenix UHSD CEA	Window Rock EA
Casa Grande UHSSSA	EA of Avondale	Laveen EA	Phoenix UHSD CTA	Winslow EA
Cave Creek EA	ESP of Chandler	Litchfield Dist EA	Pima Comm Coll EA	
	Flagstaff EA	Littleton EA	Roosevelt EA	

Work Phone: (480)635-2011

Home Phone: (480) 717-9536

Local Association: Gilbert Education Association

Education Position: Teacher, English Language Arts/6th Grade

Years Employed: 9

Total Years of Education Employment: 24

Total Years as a AEA Member: 21

Total years as a NEA Member: 24

Higher Education Degrees Held: Master of Arts in ESL, Bilingual and Equity Education – University of Colorado at Boulder (2001)
Bachelor of Arts in Elementary Education – Adams State University (1998)

Elective Positions held in local, state and/or national education associations: Arizona Education Association Treasurer, 6 years
Arizona Education Association Board of Directors – Region 8 Director, 7 years
Apache Junction Education Association Local President (wall-to-wall), 4 years

Appointive positions held in local, state and/or national education associations: National Education Association Lead Treasurer, 4 years

Arizona Education Association Rural and Small Schools Task Force Chair, 1 year
Pinal County First Things First Regional Council Member, 2 years

Non-education positions held: Globe High School Alumni Association Treasurer, 2 years
Signal Butte Manor II Homeowners Association Secretary, 3 years
Signal Butte Manor II Homeowners Association Board Member, 3 years

AEA Treasurer, 3-year term



Amber Gould

My name is Amber Gould, and I would love to serve as your next AEA Treasurer. I am a high school teacher, local president, and education advocate with finance and budgeting experience on the local, state, and national levels of our association. My experience on AEA Finance and Revenue committee over the past several years as well as my role as the senior board member on the NEA Program and Budget Committee have not only prepared me to serve at the state level, but also enabled me to strategize ways to grow and strengthen our union by prioritizing our students and members.

I've made students and members my priority through my work on the NEA Program and Budget committee as we lead our national association through threats from the Janus Supreme Court decision and through the impact of pandemic. They have been my priority as a director on the AEA board when we had to make financial decisions to elevate our collective action around Red for Ed. And now, like so many of you, I make students and members my priority by insisting on equity across the board and

working to break down the systems that oppress and deprive people of justice and liberty.

I ask to represent you, your local, and your union as treasurer of our association. With you as my driving force, I will work tirelessly and compassionately to realize powerful schools, powerful locals, and a powerful collective voice. Show your support: *Facebook.com/GouldforAEATreasurer*

Address: 7278 W Glenn Drive, Glendale, AZ 85303

Work Phone: 623.915.8557

Home Phone: 602.469.7707

Local Association: Glendale Union Education Association

Education Position: Teacher, High School English and Student Council

Years Employed: 11

Total Years of Education Employment: 11

Total Years as a AEA Member: 12

Total years as a NEA Member: 12

Higher Education Degrees Held: B.A. Secondary Education, M.A. Administrative Leadership

Elective Positions held in local, state and/or national education associations: NEA Director for Arizona, 6 years
Glendale Union Education Association President, 5 years
AEA Region 5 Director, 3 years

Appointive positions held in local, state and/or national education associations: NEA Program and Budget Committee - Senior Board Member, 5 years
NEA Membership Organizing Committee Chair, 3 years
AEA Finance and Revenue Committee, 10 years

Non-education positions held: LD 29 Precinct Committeeman, 5 years

AEA Retired Director



Luci Messing

No statement submitted

Address: 2450 N Tierra Verde Place, Tucson AZ 85749

Work Phone: 520-591-7615

Home Phone: 520-795-9593

Local Association: AEA Retired

Education Position: Teacher

Years Employed: 31

Total Years of Education Employment: 31

Total Years as a AEA Member: 40

Total years as a NEA Member: 40

Higher Education Degrees Held: Bachelors in Education

Elective Positions held in local, state and/or national education associations: AEA Retired Political Action Chair 8 years
AEA Retired Board Member 10 years
TEA President 2 years

Appointive positions held in local, state and/or national education associations: PCT Committee Manager 9 years

Non-education positions held: First Vice Chair-Pima City Dems 2 years
Chair Tanque Verde Dems 3 years
TEA President 2 years

Region 1



Nathaniel Ratey

My name is Nathaniel Ratey, but everyone calls me Nate. I am running to represent region one. Currently, I teach fifth grade at Whitmore Elementary in the

Tucson Unified School District.

I have been a classroom teacher for ten years, and in education for a few more, working briefly as an exceptional ed classroom aid and as substitute for two and half years. Just as important, I am the son of a proud AEA retired teacher.

Almost from the start I joined my association and almost as quickly found myself the president of the Sahuarita Education Association. During "Red for Ed" I helped bridge the gap between the Arizona Educators United group in Sahuarita and the association. We fought against an unsupportive superintendent who eventually realized we were serious. The association also helped fight to lower health care costs, secured raises, worked on getting the association recognized in bargaining and to bring board policies up to standards of other area districts.

After transferring to T.U.S.D. and joining T.E.A. in 2019 I have served on the bargaining committee, as a site rep and as a member of the T.E.A. board of directors. I also serve as the region one alternative director.

As a near lifelong Tucsonan, I am both a graduate of a T.U.S.D. and a graduate of the University of Arizona. If elected I will make sure the south has a voice.

Address: 5755 E River Road #3521, Tucson, AZ

Home Phone: 520-869-6236

Local Association: Tucson E.A.

Education Position: Classroom Teacher

Years Employed: 3

Total Years of Education Employment: 10

Total Years as a AEA Member: 8

Total years as a NEA Member: 8

Higher Education Degrees Held: Bachelor of Science

Elective Positions held in local, state and/or national education associations: President Sahuarita Education Association, 3 years
Tucson Education Association Board of Directors, 3 years
Alternate Director Region One, 1 year

Appointive positions held in local, state and/or national education associations: Bargaining Team, 1 year
Government Relations & Legislative Action Task Force, 1 year
Elections Committee, 1 year

Non-education positions held: Eagle Scout since 1998, Radio engineer and Producer, 27 years

Region 2



Christina Bustos

My name is Christina Bustos and I am running to be your Region 2 Director. I have been an educator for 18+ years in Phoenix, Chandler, and Mesa with a passion for education, social and racial justice, and community. It is my life's work to educate myself on issues the community is facing, listen to what the needs are, and help to bring those issues to the forefront. I have been involved in the community for 20+ years volunteering for political candidates, community organizations for immigration as well as education. As an AEA member, I have participated in several initiatives both at the state and national level and I am proud to represent our needs. I know these experiences have helped shape me into the person I am today and a Region 2 Director that you can count on.

My goal is to continue to build my knowledge and understanding at all three levels to be a resource for our local, region, and state. To that end, I will communicate regularly with all districts within my region, share information from the AEA Board of Directors meetings promptly, solicit feedback and questions to take back to the board meetings.

I look forward to serving our Region 2 community and will elevate the voice of the community and work towards creating, innovating, and building.

Remember to vote Bustos at the Ballot!

Address: 2834 S Extension R Unit 2055 Mesa Arizona 85210

Work Phone: 6025104386

Home Phone: 6025104386

Local Association: Mesa Education Association

Education Position: Educational Technology Coach

Years Employed: 4 years

Total Years of Education Employment: 19

Total Years as a AEA Member: 11

Total years as a NEA Member: 11

Higher Education Degrees Held: Bachelor of Arts in Education, Masters of Curriculum & Instruction with Emphasis in Bilingual Education

Elective Positions held in local, state and/or national education associations: Vice President of the Mesa Education Association 2021-current Executive Board Member for the Mesa Education Association 2 years Faculty Representative for School 1 year

Appointive positions held in local, state and/or national education associations: MEA Chairperson of Social and Racial Justice Committee 2019-current NEA Leaders for Just Schools member, New Orleans cohort 2021-current NEA NBI 17 Educators of Diversity Collective 2021

NEA Teacher Leadership Institute

Non-education positions held: Mother multiple years
Community Activist 18 years
Precinct committee person 3 years

Region 4



Susan Seep

I have been fortunate to sit as an alternate for two years and observe the process. I recently moved to the Regional Director seat when Kelley Fisher was elected to her current position. That being said, I haven't yet been to an in person meeting, or been able to attend the AEA-DA, in person, as a director. Now that I am entering my third year as President of PVEA, I would love the opportunity to really learn about the role and serve as your Region 4 Director. Thank you!

Address: 1217 E. Pebble Beach Dr., Tempe, AZ 85282

Home Phone: 480-242-3466

Local Association: Paradise Valley EA

Education Position: Ombudsman/Certified K-12

Years Employed: 18

Total Years of Education Employment: 18

Total Years as a AEA Member: 18

Total years as a NEA Member: 18

Higher Education Degrees Held: Masters in Secondary Ed.

Elective Positions held in local, state and/or national education associations: Region 4 Alternate, now director, 2 years
PVEA President, 2 years
PVEA Vice President, 5 years

Appointive positions held in local, state and/or national education associations: AEA Bargaining Task Force (co-chair), 1 year

Non-education positions held: Director, Southwest Speech & Debate Institute, 11 years

Region 10

No candidates nominated as of yet

ESP At Large Director

Anastasia Jimenez

Over the past 5 years, I've immersed myself in the work and calling that is public education, as an ESP. Through the support and collaboration efforts between statewide locals, AEA and the NEA, I've been equipped with the leadership skills to become a well-rounded and knowledgeable ESP leader.

Since I've began my career, I've held a few different positions within the clerical services, paraeducators, and health and student services job families. During my time, I've come to realize and understand that ESP voices, although not always welcome, are ALWAYS needed at the table. From state and national conferences and workshops to policy changes, language writing,

advocacy, and negotiations; there is always an opportunity to be engaged, uplifted, and heard.

It was only a few short years ago when I asked you all to trust me with this work, and you didn't just do that - you believed in me, encouraged me, challenged me, and crafted me into a force I didn't even know I was capable of being. I've been privileged to represent our ESPs at almost every level since then and I want to continue building up our professions, raising up our colleagues, and creating an equitable future for our students and the communities we serve. Thank you for your consideration.

Address: 1016 E Woodland Ave, Phoenix, AZ 85034

Work Phone: 602.764.1317

Home Phone: 602.800.9029

Local Association: Phoenix Union Classified Employee Association

Education Position: Sr. Office Assistant, CTE/ Magnet Programs, High School

Years Employed: 5

Total Years of Education Employment: 5

Total Years as a AEA Member: 5

Total years as a NEA Member: 5

Elective Positions held in local, state and/or national education associations: CEA Recording Secretary, 2 years
AEA ESP At-Large Director, 4 years
AEA ESP At-Large Alternate Director, 1 year

Ethnic Minority At-Large Director

No candidates nominated as of yet

Ethnic Minority Alternate At-Large Director

No candidates nominated as of yet

ESP At-Large Alternate Director



Vanessa Jimenez

In my years of experience working and volunteering in education, I have learned that a "one size fits all" model almost never works.

I have learned that, just like our students, we must meet our members where they are and support them in the ways they feel most comfortable. We continue to grow our membership by being innovative and by helping every educator find their why and the importance of sharing it. As a public-school parent for 20 years and servant leader for over 26 years I know that we can't continue to do things because "that's the way its always been done". As your Vice President I want to use my experience from time spent both in and out of the classroom, as a neighborhood leader fighting gentrification in a historic area, and as a state and national director to serve you, my colleagues, on the challenges that matter most to you.

ASSOCIATION GOVERNANCE

Getting to know what supports you need and the resources to build up OUR association and locals and accessing them. Some of my top priorities are working on language; policies and procedures that build strong locals and connect resources that will benefit our schools and communities. Education in Arizona must be a priority, it starts with lifting up the voices of the educators that fight every day for our students and this can only be done by empowering them to do so, walking side by side and leading the way. I want to lead the way.

Address: 201 N. 10th Street, Phoenix, AZ 85034

Work Phone: 602-434-0252

Home Phone: 602-264-3105

Local Association: PHX Union High School District Classified Em

Education Position: Classified PD Coordinator, High School/ Adult Learning

Years Employed: 26

Total Years of Education Employment: 26

Total Years as a AEA Member: 19

Total years as a NEA Member: 19

Higher Education Degrees Held: Associate of Applied Science, Level I and Level II Addictions

and Substance Abuse Certifications

Elective Positions held in local, state and/or national education associations: President PSU CEA, 2019

AEA ESP At-Large Director, 2017

Appointive positions held in local, state and/or nations education associations: NEA ESP At-Large Director, 2021

Non-education positions held: City of Phoenix Neighborhood Quality Technical Advisory Committee, 2018; President of Historic Booker T. Washington Neighborhood Association, 2018

Retired Alternate Director

Ken Freed

No statement submitted

Address: 1114 N AVE Jeanine Tucson, AZ 85715

Work Phone: 520-977-7316

Home Phone: 520-298-7316

Local Association: AEA Retired

Education Position: Classroom Teacher

Years Employed: 33

Total Years of Education Employment: 33

Total Years as a AEA Member: 50

Total years as a NEA Member: 50

Higher Education Degrees Held: Bachelor of Science in Business Administration, M.Ed

Elective Positions held in local, state and/or national education associations: Vice President AEA Retired, Current, President Tucson EA 1986-1989, NEA Director 1999-2005

Appointive positions held in local, state and/or nations education associations: Bargaining Team Member AEA & TEA

Budget Committee-AEA-R/AEA (FRC)/TEA Documents Committee-AEA-R & TEA

Non-education positions held: Spouse 1969-current
Father 1975-current
Grandfather 2000-current

Region 2 Alternate

No candidates nominated as of yet

Region 4 Alternate

No candidates nominated as of yet

Region 10 Alternate

No candidates nominated as of yet

2022 PROPOSED AMENDMENT TO THE AEA CONSTITUTION

C-2022-01

Article II, Section 4

Article III, Section 5,8,10

Article V, Section 2

Submitted on behalf of the AEA Board of Directors

Rationale

Updating our documents to language that is not gender-specific falls in line with our values as an organization.

To Amend the AEA Constitution as follows:

Follow this website address to view the entire document. <https://bit.ly/AEAConstitution>

Duties

Section 4. The duties of the executive officers of the Association shall be as follows:

President

a. The President shall be the executive officer of the Association and shall preside over all meetings of the Association, of the Board of Directors, and of the Delegate Assembly. ~~He/she~~ **THE PRESIDENT** shall be an ex officio member of all standing and special committees and commissions. ~~He/she~~ **THE PRESIDENT** may, whenever in ~~his/her~~ **THEIR** judgment the interests of the Association warrant it, call meetings of any standing or special committees or commissions. ~~He/she~~ **THE PRESIDENT** may, with the concurrence of the Board of Directors, call special meetings of the Association or of the Delegate Assembly. ~~He/she~~ **THE PRESIDENT** shall appoint, subject to the approval of the Board of Directors, the members and the chairpersons of all committees and commissions. ~~He/she~~ **THE PRESIDENT** shall perform such other duties as usually pertain to the office of the President.

2022 PROPOSED AMENDMENT TO THE AEA BYLAWS

B-2022-01

Article I, Section 2,4,7

Article II, Section 2

Submitted on behalf of the AEA Board of Directors

Rationale

Updating our documents to language that is not gender-specific falls in line with our values as an organization.

To Amend the AEA Bylaws as follows:

Please see the example below of the proposed amendments to the AEA Bylaws.

Follow this website address to view the entire document. <https://bit.ly/AEABylaws>

Reserve Membership

f. Reserve membership shall be open to any person who is on a leave of absence of at least six (6) months from the employment that qualifies ~~him/her~~ **THEM** for Active-Certified or Active-Educational Support membership or who has held Active-Certified or Active-Educational Support membership in the Association but whose employment status no longer qualifies that individual for such membership.

2022 PROPOSED AMENDMENT TO THE AEA BYLAWS

B-2022-02

Article I, Section 6

Rationale

This amendment seeks to build power in every local through increased membership. Many other services in our society use a reduced fee structure to entice first-time members to join. With housing and other costs rising quicker than incomes, we need to employ every tool available to continue recruiting new educators.

To Amend the AEA Bylaws as follows:

State Dues

Section 6. Dues for membership classes shall be as follows:

a. Active Certified members, WITH THE EXCEPTION OF THOSE OUTLINED IN ROMAN NUMERAL I OF THIS SUBSECTION, shall pay dues equal to 1% of the prior fiscal year's Arizona Average Beginning Teachers' Salary from the AEA Salary Manual ~~effective September 1, 2005.~~

i. THOSE JOINING THE ASSOCIATION FOR THE FIRST TIME SHALL PAY REDUCED DUES THAT WILL RAMP UP TO FULL DUES AS DESCRIBED BELOW.

EFFECTIVE SEPTEMBER 1, 2023, FIRST-TIME ACTIVE CERTIFIED MEMBERS SHALL PAY DUES EQUAL TO 75% OF THE DUES ESTABLISHED IN SUBSECTION A ABOVE. IF THEY THEN MAINTAIN MEMBERSHIP INTO A SECOND YEAR, THEY SHALL PAY 90%. IN THEIR THIRD YEAR AND ONWARD, THEY SHALL PAY 100%.

EFFECTIVE SEPTEMBER 1, 2024, FIRST-TIME ACTIVE CERTIFIED MEMBERS SHALL PAY DUES EQUAL TO 60% OF THE DUES ESTABLISHED IN SUBSECTION A ABOVE. IF THEY THEN MAINTAIN MEMBERSHIP INTO A SECOND YEAR, THEY SHALL PAY 75%. IN THEIR THIRD YEAR AND ONWARD, THEY SHALL PAY 100%.

EFFECTIVE SEPTEMBER 1, 2025 AND FROM THIS DATE ONWARD, FIRST-TIME ACTIVE CERTIFIED MEMBERS SHALL PAY DUES EQUAL TO 50% OF THE DUES ESTABLISHED IN SUBSECTION A ABOVE. IF THEY THEN MAINTAIN MEMBERSHIP INTO A SECOND YEAR, THEY SHALL PAY 75%. IN THEIR THIRD YEAR AND ONWARD, THEY SHALL PAY 100%.

ii. ALL LOCAL AFFILIATES OF AEA WILL ALSO HAVE THEIR **LOCAL** DUES FOR FIRST-TIME ACTIVE CERTIFIED MEMBERS REDUCED, WITH ALL PERCENTAGES AND EFFECTIVE DATES MATCHING THOSE OUTLINED IN ROMAN NUMERAL I OF THIS SUBSECTION.

~~First year teachers~~ **FIRST-YEAR EDUCATORS** who enroll as members of the Association shall receive a one-year \$10.00 credit toward AEA Active dues for each year of Student NEA membership, not to exceed \$50.00. ~~Second year teachers~~ **SECOND-YEAR EDUCATORS** who enroll as first-time members of the Association shall receive a one-year \$5.00 credit toward AEA Active dues for each year of Student NEA membership, not to exceed \$25.00. The first time Active member shall provide proof of membership in Student NEA.

b. Active Educational Support members, **WITH THE EXCEPTION OF THOSE OUTLINED IN ROMAN NUMERAL I OF THIS SUBSECTION**, shall pay dues equal to 50% of that year's active Certified members dues ~~effective September 1, 2005.~~

i. THOSE JOINING THE ASSOCIATION FOR THE FIRST TIME SHALL PAY REDUCED DUES THAT WILL RAMP UP TO FULL DUES AS DESCRIBED BELOW.

EFFECTIVE SEPTEMBER 1, 2023, FIRST-TIME ACTIVE EDUCATIONAL SUPPORT MEMBERS SHALL PAY DUES EQUAL TO 75% OF THE DUES ESTABLISHED IN SUBSECTION B ABOVE. IF THEY THEN MAINTAIN MEMBERSHIP INTO A SECOND YEAR, THEY SHALL PAY 90%. IN THEIR THIRD YEAR AND ONWARD, THEY SHALL PAY 100%.

EFFECTIVE SEPTEMBER 1, 2024, FIRST-TIME ACTIVE EDUCATIONAL SUPPORT MEMBERS SHALL PAY DUES EQUAL TO 60% OF THE DUES ESTABLISHED IN SUBSECTION B ABOVE. IF THEY THEN MAINTAIN MEMBERSHIP INTO A SECOND YEAR, THEY SHALL PAY 75%. IN THEIR THIRD YEAR AND ONWARD, THEY SHALL PAY 100%.

EFFECTIVE SEPTEMBER 1, 2025 AND FROM THIS DATE ONWARD, FIRST-TIME ACTIVE EDUCATIONAL SUPPORT MEMBERS SHALL PAY DUES EQUAL TO 50% OF THE DUES ESTABLISHED IN SUBSECTION B ABOVE. IF THEY THEN MAINTAIN MEMBERSHIP INTO A SECOND YEAR, THEY SHALL PAY 75%. IN THEIR THIRD YEAR AND ONWARD, THEY SHALL PAY 100%.

ii. ALL LOCAL AFFILIATES OF AEA WILL ALSO HAVE THEIR DUES FOR FIRST-TIME ACTIVE EDUCATIONAL SUPPORT MEMBERS REDUCED, WITH ALL PERCENTAGES AND EFFECTIVE DATES MATCHING THOSE OUTLINED IN ROMAN NUMERAL I OF THIS SUBSECTION.



345 East Palm Lane

Phoenix, AZ
85004-1532

(602) 264-1774

(800) 352-5411

FAX
(602) 240-6887

www.arizonaea.org

Dear Delegate,

Welcome to the 2022 Arizona Education Association (AEA) Delegate Assembly!

The AEA financial presentation consists of the fiscal allocations (budgets) for the current fiscal year, 2021-2022, as well as allocations for the following 2 fiscal cycles of 2022-2023 and 2023-2024. Also disclosed is the annual independent audit report for 2020-2021. These sections of the financial presentation include AEA's liabilities and assets, income and expenditures, AEA's strategic objectives and goals for our professional organization.

AEA is committed to delivering programs that meet our strategic objectives and goals, while at the same time, ensuring we are fiscally responsible so our organization continues to strengthen financially as membership rebuilds. Our collective responsibility is to ensure a fiscally-healthy organization to pass on to the next generation of leaders so they can continue to meet the challenges as they work to fulfill our mission.

I would like to thank the Finance and Revenue Committee, the Audit Committee, AEA managers and staff, my fellow officers, and the AEA Board of Directors for their continued focus on our organization's core values, member representation, and advocacy for Arizona's public schools.

As an elected delegate to AEA's annual governance meeting, you serve as the liaison between your local constituents and our state organization. You will have an upcoming opportunity to participate at a regional pre-Delegate Assembly caucus. I ask that you please make every effort to attend. This meeting will provide time before the Delegate Assembly to obtain information on the budget process and seek clarification of the financial presentation from your Regional Directors. Your input is important and valued in this process.

Thank you for your time, commitment and membership in your professional organization. I look forward to working with you because we build a better organization together.

Angela Philpot, Treasurer
Arizona Education Association

AEA's Mission

*AEA...
keeping the
promise of
quality
public
education*

AEA Financials and Budget

Strategic Plan and Resource Allocation
Fiscal Years 2021-2022, 2022-2023 and 2023-2024
Overview

As of February 5, 2022

	2021-2022	2022-2023	2023-2024
Membership Dues	\$ 6,114,493	\$ 6,285,948	\$ 6,285,948
NEA Support	1,253,151	1,011,851	871,121
Other Income	112,924	112,924	112,924
REVENUE	\$ 7,480,568	\$ 7,410,723	\$ 7,269,993
I - Powerful Union	\$ 4,951,636	\$ 4,732,288	\$ 4,658,845
II - Public Schools Our Students Deserve	429,434	435,541	382,187
III - Provide for Implementation of Direction	2,093,481	2,217,493	2,228,894
	7,474,551	7,385,322	7,269,926
Reserve Allocation	6,017	25,401	67
EXPENSES	\$ 7,480,568	\$ 7,410,723	\$ 7,269,993

AEA Financials and Budget

Strategic Plan and Resource Allocation Fiscal Years 2021-2022, 2022-2023 and 2023-2024

Revenues

As of February 5, 2022

Membership Dues:

Category	FTE's @		Dues			
	1/15/2022	2021-2022	2021-2022	2022-2023	2022-2023	2023-2024
Active-Certified	14,728	\$387.00	\$ 5,699,736	\$398.00	\$ 5,861,744	\$ 5,861,744
Active-ESP	1,722	193.50	333,207	199.00	342,678	342,678
Student	102	3.00	306	3.00	306	306
Reserve-Certified	32	193.50	6,384	199.00	6,368	6,368
Reserve-ESP	1	99.75	100	99.50	100	100
Retired	2,041	35.00	71,435	35.00	71,435	71,435
Associate	9	48.00	432	48.00	432	432
Staff	1	99.75	100	99.50	100	100
Substitute	14	193.50	2,792	199.00	2,785	2,785
Total Membership Dues			6,114,493		6,285,948	6,285,948

NEA Support:

Organizational Consultant Grants (UniServ)	13	535,158	535,158	535,158
Organizational Sparsity Grants	3	123,498	123,498	123,498
Organizational Development Grant	2	82,332	-	-
Part-Time Organizational Grants	2	12,350	12,350	12,350
Unified Legal Services Program - NEA Reimbursement		85,500	90,000	82,000
NEA Cooperative Project Grants		414,313	250,845	118,115
Total NEA Support		1,253,151	1,011,851	871,121

Other Income:

Rental Income	46,924	46,924	46,924
Minority Scholarship Income	1,500	1,500	1,500
Service & Fee Revenue	62,000	62,000	62,000
Interest Income	1,500	1,500	1,500
Miscellaneous	1,000	1,000	1,000
Total Other Income	112,924	112,924	112,924

REVENUE

\$ 7,480,568	\$ 7,410,723	\$ 7,269,993
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AEA Financials and Budget

Strategic Plan and Resource Allocation
Fiscal Years 2021-2022, 2022-2023 and 2023-2024
Expenses

As of February 5, 2022

STRATEGIC OBJECTIVE	2021-2022	2022-2023	2023-2024
I Building a powerful union of educators by engaging our members, developing leaders, and organizing strong and relevant locals.	\$ 4,951,636	\$ 4,732,288	\$ 4,658,845

AEA Delegate Assembly New Business Items

None

AEA Organizational Resources

Membership Team, Advocacy and Bargaining Content Team, AEA Student Organizer, AEA-Retired, Local Association/Leadership Development Team, Bargaining and Working Conditions Task Force, ESP Membership Task Force, Member Benefits Task Force, Membership and Organizing Task Force, Communications Team.

AEA Organizational Implementation

Strategy PO A: Organizing. Develop a deep organizing culture rooted in distributed leadership to identify opportunities and tools to build a powerful union by growing the number of engaged members at the site, local, state and national level.	3,030,091	2,908,979	2,851,342
Strategy PO B: Leader Identification and Training. Develop the structure to identify, train, and support new and existing leaders by enhancing skill sets, building local and statewide capacity. Provide paths that encompass and reflect on AEA's Mission and Values.	912,426	936,004	936,709
Strategy PO C: Visible and Accessible. Members, potential members and the public will recognize local and state organizations as fighting for issues that are important to them. Integrate technology use across multiple platforms to engage members in organizing opportunities.	5,100	5,100	5,100
Strategy PO D: Collective Power. Lead with AEA Values and Objectives to impact state and local policy. Build and lead relevant local and statewide coalitions representing member interests by embracing the collective power of AEA.	752,432	692,107	674,741
Strategy PO E: An Engaged Membership Acting for Change. Develop engagement indicators to assist the local and state associations to focus on engagement opportunities to identify potential members, leaders, build capacity, build power, and grow the union. Develop innovative tools and platforms using technology to deliver content for engagement.	251,587	190,098	190,953

AEA Financials and Budget

**Strategic Plan and Resource Allocation
Fiscal Years 2021-2022, 2022-2023 and 2023-2024**

Expenses

As of February 5, 2022

STRATEGIC OBJECTIVE	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>
II Creating the public schools our students deserve a) with fully-staffed professionals empowered to know and support their students, engage them in rich curriculum, and challenge them to grow and achieve b) with fully-resourced public schools where professionals are respected, involved in decision-making, and free to advocate for the best learning and working conditions c) with racially and socially just public schools that reflect the rich diversity of the communities they serve	\$ 429,434	\$ 435,541	\$ 382,187

AEA Delegate Assembly New Business Items

None

AEA Organizational Resources

Quality Teaching and Learning Content Teams, Public Policy Content Team, Communications Team, Educators of Color Leadership Task Force, Government Relations and Legislative Action Task Force, Instruction and Professional Development Task Force, Rural Schools Task Force, Task Force on Racial and Social Justice in Education, Task Force for a New Vision for Arizona Schools.

AEA Organizational Implementation

Strategy PS A: Training on Demand. Develop structures to assess and create site, local and state training opportunities using technology and member engagement.	10,000	10,000	10,000
Strategy PS B: Targeted Trainings. Develop and implement programs and structures to support local organizing efforts using professional development and quality teaching and learning.	25,556	75,000	20,000
Strategy PS C: Activism and Communication. Develop and implement internal and external communication platforms to promote member engagement and impact.	388,878	335,541	337,187
Strategy PS D: Advance the AEA Mission, Values While Pursuing a Racially and Socially Just World. Lead and advance a culture of social justice awareness, understanding of systemic and internal racism at the district and state level.	5,000	5,000	5,000
Strategy PS E: Reflect on the Narrative, Culture, Aspirations and Values of Our Members and Students. Engage in awareness of racial and social justice issues facing our students and our communities.	-	10,000	10,000

AEA Financials and Budget

**Strategic Plan and Resource Allocation
Fiscal Years 2021-2022, 2022-2023 and 2023-2024**

Expenses

As of February 5, 2022

STRATEGIC OBJECTIVE	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>
<p>III Provide for management and development of a professional staff focused on implementing and operationalizing the direction set for the Association by the Association’s governance decision-making bodies.</p> <p>AEA Delegate Assembly New Business Items New Business Items</p> <p>AEA Organizational Resources Audit Committee, Compliance Review Committee, Elections Committee, Finance and Revenue Committee, Resolutions, Rules, Constitution & Bylaws Committee, AEA Board of Directors and AEA Officers.</p> <p>AEA Organizational Implementation Strategy ID A: Management and Allocation of AEA’s Assets, Infrastructure, and Corporate and Social Responsibilities. Develop integrated plans to leverage the talent and resources from engaged members to grow and maintain a strong union and win campaigns to advance AEA’s Mission and Values.</p> <p>Strategy ID B: Technology and Administrative Resources. Build and maintain a technological and administrative infrastructure which will enable fast and efficient communication and processing by and between our members, leaders and staff.</p> <p>Strategy ID C: Facilities. Provide resources to maintain points of presence throughout the state in which to conduct AEA and local business while providing a safe working environment for our association officers and staff.</p>	<p>\$ 2,093,481</p> <p></p> <p></p> <p>1,026,121</p> <p>493,493</p> <p>573,867</p>	<p>\$ 2,217,493</p> <p></p> <p></p> <p>1,144,333</p> <p>515,093</p> <p>558,067</p>	<p>\$ 2,228,894</p> <p></p> <p></p> <p>1,151,498</p> <p>518,093</p> <p>559,303</p>

AEA Financials and Budget

**AEA General Fund
Balance Sheet Comparisons
December 31, 2021 & December 31, 2020**

	Balance As Of		Change from Prior Year	
	12/31/21	12/31/20	\$	%
ASSETS				
Cash				
Operating - Current	\$ 1,562,622	\$ 1,858,146	\$ (295,524)	-15.9%
Operating - Reserves	2,259,507	2,071,243	188,264	9.1%
Permanent Reserves	<u>1,937,933</u>	<u>1,033,159</u>	<u>904,774</u>	<u>87.6%</u>
Total Cash	5,760,062	4,962,548	797,514	16.1%
Receivables				
Membership Receivables	6,172,306	6,214,141	(41,835)	-0.7%
Other Receivables	<u>4,769</u>	<u>2,118</u>	<u>2,651</u>	<u>125.2%</u>
Total Receivables	6,177,075	6,216,259	(39,184)	-0.6%
Prepaid Expenses	113,658	25,852	87,806	339.6%
Property & Equipment	3,434,607	3,605,107	(170,500)	-4.7%
Deposits	<u>763</u>	<u>763</u>	<u>-</u>	<u>0.0%</u>
TOTAL ASSETS	<u>\$ 15,486,165</u>	<u>\$ 14,810,529</u>	<u>\$ 675,636</u>	<u>4.6%</u>
LIABILITIES				
Current Liabilities				
Payables	\$ 4,111,112	\$ 4,186,242	\$ (75,130)	-1.8%
Deferred Revenue	4,907,500	4,743,983	163,517	3.4%
Current Portion of Debt	<u>112,370</u>	<u>106,827</u>	<u>5,543</u>	<u>5.2%</u>
Total Current Liabilities	9,130,982	9,037,052	93,930	1.0%
Other Liabilities	1,893,278	2,007,055	(113,777)	-5.7%
TOTAL LIABILITIES	<u>11,024,260</u>	<u>11,044,107</u>	<u>(19,847)</u>	<u>-0.2%</u>
TOTAL NET ASSETS	4,326,434	3,403,025	923,409	27.1%
Year to Date Surplus/(Loss)	<u>135,471</u>	<u>363,397</u>	<u>(227,926)</u>	<u>-62.7%</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 15,486,165</u>	<u>\$ 14,810,529</u>	<u>\$ 675,636</u>	<u>4.6%</u>

AEA Financials and Budget

Income & Expense Summary Comparison December 31, 2021 & December 31, 2020

	<u>Actual</u>		<u>Budget</u>	
	<u>Current Year</u>	<u>Prior Year</u>	<u>Current Year</u>	<u>Remaining</u>
INCOME				
Membership Dues	\$ 2,055,286	\$ 2,048,984	\$ 6,291,173	\$ 4,235,887
NEA Support	337,268	551,500	1,357,672	1,020,404
Other Income	<u>16,436</u>	<u>26,083</u>	<u>112,924</u>	<u>96,488</u>
TOTAL INCOME	2,408,990	2,626,567	7,761,769	5,352,779
EXPENSES				
I - Powerful Union	1,565,205	1,537,386	4,868,230	3,303,025
II - Public Schools Our Students Deserve	104,665	128,267	611,436	506,771
III - Implementation of Direction	<u>603,649</u>	<u>597,517</u>	<u>2,245,497</u>	<u>1,641,848</u>
TOTAL EXPENSES	\$ 2,273,519	\$ 2,263,170	\$ 7,725,163	\$ 5,451,644
NET AFTER EXPENSES	<u>\$ 135,471</u>	<u>\$ 363,397</u>		

2020-2021 Independent Audit

INDEPENDENT AUDITORS' REPORT

The Board of Directors
Arizona Education Association
Phoenix, Arizona

We have audited the accompanying financial statements of Arizona Education Association (a nonprofit organization), which comprise the statement of financial position as of August 31, 2021, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

2020-2021 INDEPENDENT AUDIT

INDEPENDENT AUDITORS' REPORT

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Arizona Education Association as of August 31, 2021, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Report on Summarized Comparative Information

We have previously audited the Arizona Education Association's 2020 financial statements, and our report dated October 27, 2020, expressed an unmodified opinion on those audited financial statements. In our opinion, the summarized comparative information presented herein as of and for the year ended August 31, 2020, is consistent, in all material respects, with the audited financial statements from which it has been derived.

Henry + Home, LLP

Tempe, Arizona
October 27, 2021

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
 STATEMENT OF FINANCIAL POSITION
 August 31, 2021
 (With Summarized Totals for August 31, 2020)

	<u>General Fund</u>	<u>Education Improvement & Defense Fund</u>	<u>2021 Total</u>	<u>2020 Total</u>
ASSETS				
CURRENT ASSETS				
Cash and cash equivalents	\$ 4,450,293	\$ 64,651	\$ 4,514,944	\$ 3,772,145
Receivables from local associations, school districts and other	29,374	-	29,374	24,585
Prepaid expenses	<u>100,274</u>	<u>-</u>	<u>100,274</u>	<u>27,408</u>
TOTAL CURRENT ASSETS	<u>4,579,941</u>	<u>64,651</u>	<u>4,644,592</u>	<u>3,824,138</u>
PROPERTY AND EQUIPMENT				
Land	1,010,000	-	1,010,000	1,010,000
Headquarters building	2,790,434	-	2,790,434	2,790,434
Southern regional office	872,245	-	872,245	872,245
Building improvements	595,470	-	595,470	558,428
Furniture, fixtures and equipment	<u>572,608</u>	<u>-</u>	<u>572,608</u>	<u>582,084</u>
	5,840,757	-	5,840,757	5,813,191
Accumulated depreciation	<u>(2,356,113)</u>	<u>-</u>	<u>(2,356,113)</u>	<u>(2,180,650)</u>
	<u>3,484,644</u>	<u>-</u>	<u>3,484,644</u>	<u>3,632,541</u>
OTHER ASSETS	<u>763</u>	<u>-</u>	<u>763</u>	<u>763</u>
TOTAL ASSETS	<u>\$ 8,065,348</u>	<u>\$ 64,651</u>	<u>\$ 8,129,999</u>	<u>\$ 7,457,442</u>

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
 STATEMENT OF FINANCIAL POSITION (Continued)
 August 31, 2021
 (With Summarized Totals for August 31, 2020)

	General Fund	Education Improvement & Defense Fund	2021 Total	2020 Total
LIABILITIES AND NETASSETS				
CURRENT LIABILITIES				
Current portion of long-term debt	\$ 112,370	\$ -	\$ 112,370	\$ 106,827
Accounts payable and accrued liabilities	434,203	-	434,203	369,567
Accrued vacation leave	88,357	-	88,357	108,532
Deferred revenue - NEA grants	607,212	-	607,212	552,720
Deferred revenue - membership	373,753	-	373,753	296,491
TOTAL CURRENT LIABILITIES	1,615,895	-	1,615,895	1,434,137
ACCRUED RETIREMENT BENEFITS	212,391	-	212,391	195,000
LONG-TERM DEBT, net of current portion	1,930,156	-	1,930,156	2,042,302
TOTAL LIABILITIES	3,758,442	-	3,758,442	3,671,439
NET ASSETS WITHOUT DONOR RESTRICTIONS				
Education improvement	-	64,651	64,651	383,459
Designated:				
Permanent reserve	1,033,467	-	1,033,467	717,196
Compensated absences fund	300,748	-	300,748	303,532
Defense fund	183,722	-	183,722	137,618
Emergency assistance	25,890	-	25,890	25,789
AEA Minority scholarship account	-	-	-	270
Unappropriated	2,763,079	-	2,763,079	2,218,139
TOTAL NET ASSETS WITHOUT DONOR RESTRICTIONS	4,306,906	64,651	4,371,557	3,786,003
TOTAL LIABILITIES AND NET ASSETS WITHOUT DONOR RESTRICTIONS	\$ 8,065,348	\$ 64,651	\$ 8,129,999	\$ 7,457,442

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
 STATEMENT OF ACTIVITIES
 Year Ended August 31, 2021
 (With Summarized Totals for August 31, 2020)

	<u>General Fund</u>	<u>Education Improvement & Defense Fund</u>	<u>2021 Total</u>	<u>2020 Total</u>
REVENUES AND GAINS				
Membership dues	\$ 6,112,711	\$ -	\$ 6,112,711	\$ 6,202,477
Contributions	-	272,045	272,045	62,314
NEA grants and other income	1,478,183	-	1,478,183	2,037,413
Gain (loss) on sale of assets and other income	(2,820)	-	(2,820)	(1,655)
Interest income	1,332	3	1,335	29,267
Rental income	<u>51,109</u>	<u>-</u>	<u>51,109</u>	<u>48,348</u>
TOTAL REVENUES AND GAINS	<u>7,640,515</u>	<u>272,048</u>	<u>7,912,563</u>	<u>8,378,164</u>
OPERATING EXPENSES:				
Program services				
Membership	1,233,592	-	1,233,592	1,146,037
Public policy	1,588,644	590,856	2,179,500	1,977,161
Advocacy and bargaining	1,510,814	-	1,510,814	1,633,239
Quality teaching and learning	427,052	-	427,052	665,600
Communications	<u>342,635</u>	<u>-</u>	<u>342,635</u>	<u>398,252</u>
Total program services	5,102,737	590,856	5,693,593	5,820,289
Management and general	<u>1,633,416</u>	<u>-</u>	<u>1,633,416</u>	<u>2,030,030</u>
TOTAL OPERATING EXPENSES	<u>6,736,153</u>	<u>590,856</u>	<u>7,327,009</u>	<u>7,850,319</u>
CHANGE IN NET ASSETS	904,362	(318,808)	585,554	527,845
NET ASSETS AT BEGINNING OF YEAR	<u>3,402,544</u>	<u>383,459</u>	<u>3,786,003</u>	<u>3,258,158</u>
NET ASSETS AT END OF YEAR	<u>\$ 4,306,906</u>	<u>\$ 64,651</u>	<u>\$ 4,371,557</u>	<u>\$ 3,786,003</u>

ARIZONA EDUCATION ASSOCIATION
 STATEMENT OF FUNCTIONAL EXPENSES
 Year Ended August 31, 2021
 (With Summarized Totals for August 31, 2020)

	Membership	Public Policy	Advocacy and Bargaining	Quality Teaching and Learning	Communications	Total Program	Management and General	2021 Total Expenses	2020 Total Expenses
Salaries	\$ 487,059	\$ 673,298	\$ 654,400	\$ 214,844	\$ 158,401	\$ 2,188,002	\$ 851,248	\$ 3,039,250	\$ 3,062,012
Payroll taxes and benefits	344,198	456,487	394,858	144,262	105,597	1,445,402	339,660	1,785,062	1,788,384
Advertising and promotions	37,528	29,137	9,893	2,817	8,336	87,711	-	87,711	26,440
Travel and entertainment	41,244	25,511	18,776	7,199	928	93,658	79,294	172,952	199,224
Occupancy	78,814	79,150	69,059	25,647	16,719	269,389	122,001	391,390	418,223
Office supplies and postage	24,983	60,791	7,600	2,489	16,830	112,693	6,462	119,155	101,033
Depreciation	37,797	42,957	38,570	13,525	11,785	144,634	76,386	221,020	218,303
Professional and contract services	93,773	146,887	261,444	-	11,906	514,010	38,622	552,632	1,039,303
Telephone	7,672	10,157	9,441	3,194	2,584	33,048	10,952	44,000	43,818
Dues and subscriptions	1,271	8,717	4,473	-	-	14,461	7,919	22,380	21,677
Merchant and bank fees	39,018	891	1,013	1,176	-	42,098	1,128	43,226	41,237
Technology	28,159	34,685	35,401	11,222	7,900	117,367	47,574	164,941	182,598
Equipment rental	-	1,572	-	-	-	1,572	18,903	20,475	1,480
Contributions	-	590,000	-	-	-	590,000	-	590,000	500,000
Miscellaneous	12,076	19,260	5,886	677	1,649	39,548	33,267	72,815	206,587
	<u>\$ 1,233,592</u>	<u>\$ 2,179,500</u>	<u>\$ 1,510,814</u>	<u>\$ 427,052</u>	<u>\$ 342,635</u>	<u>\$ 5,693,593</u>	<u>\$ 1,633,416</u>	<u>\$ 7,327,009</u>	<u>\$ 7,850,319</u>

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
 STATEMENT OF CASH FLOWS
 Year Ended August 31, 2021
 (With Summarized Totals for August 31, 2020)

	General Fund	Improvement & Defense Fund	2021 Total	2020 Total
CASH FLOWS FROM OPERATING ACTIVITIES				
Cash received from members, NEA and others	\$ 7,766,148	\$ 272,045	\$ 8,038,193	\$ 9,040,015
Cash paid to vendors, locals and employees	(6,410,887)	(590,856)	(7,001,743)	(8,236,922)
Cash paid towards interest	(111,977)	-	(111,977)	(108,851)
Cash received for interest	<u>1,332</u>	<u>3</u>	<u>1,335</u>	<u>29,267</u>
NET CASH PROVIDED BY (USED IN) OPERATING ACTIVITIES	<u>1,244,616</u>	<u>(318,808)</u>	<u>925,808</u>	<u>723,509</u>
CASH FLOWS FROM INVESTING ACTIVITIES				
Redemption of certificates of deposit	-	-	-	758,318
Purchases of property and equipment	<u>(76,406)</u>	<u>-</u>	<u>(76,406)</u>	<u>(130,683)</u>
NET CASH PROVIDED BY (USED IN) INVESTING ACTIVITIES	<u>(76,406)</u>	<u>-</u>	<u>(76,406)</u>	<u>627,635</u>
CASH FLOWS FROM FINANCING ACTIVITIES				
Payments on long-term debt	<u>(106,603)</u>	<u>-</u>	<u>(106,603)</u>	<u>(100,147)</u>
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	1,061,607	(318,808)	742,799	1,250,997
CASH AND CASH EQUIVALENTS				
BEGINNING OF YEAR	<u>3,388,686</u>	<u>383,459</u>	<u>3,772,145</u>	<u>2,521,148</u>
CASH AND CASH EQUIVALENTS END OF YEAR	<u>\$ 4,450,293</u>	<u>\$ 64,651</u>	<u>\$ 4,514,944</u>	<u>\$ 3,772,145</u>

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 1 NATURE OF ACTIVITIES AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Activities

The Arizona Education Association (the "Association") was incorporated in the state of Arizona as a not-for-profit organization in November 1939. The Association was formed in 1892, when a group of Arizona educators banded together to protest the use of 14-year-old textbooks. The Association is an advocate for support of Arizona's public schools, improving the quality of public education through positive change and improving the professional lives of teachers and school staff members.

Association members are teachers, community college professors, counselors, speech pathologists, bus drivers, secretaries, retired educators and student teachers that also belong to 177 local affiliates across Arizona. The Association offers programs in quality teaching and learning, bargaining and advocacy, government relations, communications and public relations, legal services and member benefits. Association leaders participate in education, business and civic partnerships and coalitions as part of its mission to make Arizona's public schools the best they can be.

The Association is affiliated with the National Education Association ("NEA").

The Association's major programs are:

Membership: Establish and maintain a dynamic organization through the recruitment and engagement of members and development of strong and effective local leaders and associations.

Public Policy: Work to shape state and local policy to ensure funding and resources are available to provide a quality public education for every student.

Advocacy and Bargaining: Work to ensure that every Arizona public school will have working conditions which will positively impact student success and achievement while providing salaries and benefits sufficient to attract and retain highly skilled, competent and diverse work forces.

Quality Teaching and Learning: Provide professional learning opportunities to support educators with new tools, skills, and knowledge to improve practices that support student success.

Communications: Develop multi-faceted communications systems to inform and engage members in the priorities and vision of the association.

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 1 NATURE OF ACTIVITIES AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Comparative Financial Information

The financial statements include certain prior year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with accounting principles generally accepted in the United States of America. Accordingly, such information should be read in conjunction with the Association's financial statements for the year ended August 31, 2020, from which the summarized information was derived.

Cash and Cash Equivalents

For purposes of the statement of cash flows, the Association considers all highly liquid investments with an initial maturity of three months or less to be cash equivalents.

Receivables

Receivables are amounts due for reimbursements from local associations, school districts and others and are stated at the amount management expects to collect from the outstanding balances. Management provides for probable uncollectible amounts through a provision for bad debt expense and an adjustment to a valuation allowance based on its assessment of the current status of individual accounts. Balances that are still outstanding after management has used reasonable collection efforts are written off through a charge to the valuation allowance and a credit to accounts receivable. At August 31, 2021, based on historical experience, management expects to collect 100% of receivables; therefore, no valuation allowance for uncollectible accounts has been established.

Property and Equipment

The Association capitalizes acquisitions of property and equipment, generally, in excess of \$1,000. Property and equipment are stated at cost.

Depreciation is provided on the straight-line method over the estimated useful lives of the assets. Depreciation expense amounted to \$221,020 for the year ended August 31, 2021. Maintenance and repairs are charged to expense as incurred; major renewals and betterments are capitalized. When items of property or equipment are sold or retired, the related cost and accumulated depreciation are removed from the accounts and any gain or loss is included in income.

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 1 NATURE OF ACTIVITIES AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Impairment of Long-Lived Assets

The Association reviews long-lived assets for impairment whenever events or changes in circumstances indicate that the carrying amount of an asset may not be recoverable. Recoverability of assets to be held and used is measured by a comparison of the carrying amount of an asset to future net cash flows expected to be generated by the asset. If such assets are considered to be impaired, the impairment to be recognized is measured by the amount by which the carrying amount of the assets exceeds the fair value of the assets. Assets to be disposed of are reported at the lower of the carrying amount or fair value less costs to sell.

Revenue Recognition

The majority of the Association's revenue arrangements generally consist of revenue recognized over time as benefits are provided or a single performance obligation to transfer promised services.

Earned revenues where performance obligations are satisfied at a point in time consist primarily of rental income when the Association rents out its conference rooms to various education-related entities. Earned revenues where performance obligations are satisfied over time consist primarily of membership dues. Contract liabilities include proceeds from membership dues received prior to the fiscal year in which provision of membership benefits occurs, which are presented as deferred revenue. Membership dues revenue is recognized over the term of the membership agreement as the membership benefits are relatively equally provided to the members on a monthly basis over the annual membership term. Membership dues are generally due to be paid equally throughout the membership term.

The Association also collects dues and contributions for affiliated entities, including NEA. These dues and contributions are remitted to the related entities throughout the year and are not included in the accompanying statement of activities.

Conditional Contributions

NEA provides funding to the Association for the administration of various projects. These amounts are conditional contributions where conditions are met as eligible expenses are incurred. NEA grant income is recognized in the period the conditions are substantially met. Deferred revenue is recorded when cash is received before the related costs are incurred.

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 1 NATURE OF ACTIVITIES AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Education Improvement and Defense Fund

The Association has established a separate fund to provide support to legislative initiatives and propositions that further the improvement of education in Arizona. Contributions and grants are received from members of the Association and from the NEA.

Functional Allocations

Certain costs have been allocated among programs and management and general. The allocation method used is based on salaries and utilization of office space and is subject to a degree of estimation by management.

Net Assets

Net assets without donor restrictions are net assets available for use in general operations and not subject to donor or grantor restrictions.

Income Taxes

The Association is a nonprofit organization incorporated under the laws of the State of Arizona and qualifies as a tax-exempt organization in accordance with Section 501(c)(6) of the Internal Revenue Code and Section 43-1201 of Arizona Revised Statutes. The exemption is on all income except unrelated business income as noted under Section 511 of the Internal Revenue Code. The Association is subject to income tax on certain advertising income. During the year ended August 31, 2021, there was no taxable income from this activity. The Association has a net operating loss carryforward available to offset any future taxable income from these activities. The net operating loss carryforward of approximately \$204,000 begins to expire in 2022. An asset has not been recorded to reflect the benefit of this net operating loss carryforward as it is not expected to be utilized.

The Association recognizes uncertain tax positions in the financial statements when it is more-likely-than-not the positions will not be sustained upon examination by taxing authorities. As of August 31, 2021, the Association had no uncertain tax positions that qualify for either recognition or disclosure in the financial statements.

The Association recognizes interest and penalties associated with income taxes in operating expenses. During the year ended August 31, 2021, the Association did not have any income tax related interest and penalty expense.

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 1 NATURE OF ACTIVITIES AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Management's Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and reported amounts of revenues and expenses during the reporting period. Accordingly, actual results could differ from these estimates.

Date of Management's Review

In preparing these financial statements, the Association has evaluated events and transactions for potential recognition or disclosure through October 27, 2021, the date the financial statements were available to be issued.

NOTE 2 LIQUIDITY

The Association monitors its liquidity, so it is able to meet its operating needs and other contractual commitments. The Association's financial assets that could readily be made available within one year of the fiscal year end to fund expense without limitations is equal to their total current assets less prepaid expenses as of August 31, 2021, totaling \$4,544,318 as the amounts are realizable within one year and are for normal program activities.

In addition to financial assets available to meet general expenditures over the year, the Association operates with a balanced budget and anticipates covering its general expenditures by collecting membership dues, contributions, grants, and other revenues.

NOTE 3 CONCENTRATIONS OF CREDIT RISK

Financial instruments that potentially subject the Association to significant concentrations of credit risk consist principally of cash and trade accounts receivable. The Association maintains its cash in bank accounts, which at times may exceed federally insured limits. The Association has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on cash balances.

The Association also maintains money market funds. Balances of money market funds are insured up to \$500,000 by the Securities Investor Protection Corporation. Additional balances may be covered by the brokerage firm.

Concentrations of credit risk with respect to receivables are limited due to the Association's historical experience with the organizations making up the balances.

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 4 LONG-TERM DEBT

Notes payable consisted of the following August 31, 2021:

Note payable dated June 5, 2019 with a maturity date of June 2034. Note payable due in monthly installments of \$2,554, including interest at 5.40%, secured by a deed of trust on the Tucson real property. In the event of a default under the loan agreement, the interest rate can be increased to 8.40%.

\$ 282,068

Note payable, with an original balloon payment due July 2019, was amended on August 1, 2019 extending the maturity date to August 2024. Note payable due in monthly installments of \$15,661, including interest at 5.25%, with a balloon payment due August 2024 and is secured by the Headquarters real property.

1,760,458

Current portion of long-term debt

2,042,526

(112,370)

\$ 1,930,156

Annual principal payments due on long-term debt are as follows:

Year Ended August 31,

2022

\$ 112,370

2023

118,260

2024

1,579,041

2025

18,327

2026

19,358

Thereafter

195,170

\$ 2,042,526

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 5 BOARD-DESIGNATED NET ASSETS WITHOUT DONOR RESTRICTION

The Association maintains cash balances in various funds relating to specific designations as determined by the Board of Directors consisting of the following as of August 31, 2021:

Permanent reserve	\$ 1,033,467
Compensated absences fund	300,748
Defense fund	183,722
Emergency assistance fund	<u>25,890</u>
	<u>\$ 1,543,827</u>

NOTE 6 RETIREMENT BENEFITS

The Association's sick leave policy provides for the accumulation and carryover of sick leave up to a maximum of 156 days earned and unused during a year. Upon reaching retirement, and the age of 55 (if employed for ten or more years) or death (if employed for ten or more years), 60-65 percent of the unused accumulated sick leave is paid to the employee or beneficiary based on the employee's rate of pay at that time. During the year ended August 31, 2021, no amounts were paid out in accumulated sick benefits. The liability as of August 31, 2021 was \$212,391.

The Association participates in a multi-employer plan administered by the NEA and Affiliate Retiree Health Trust. The multi-employer plan provides welfare benefits to employees of the NEA and its eligible affiliates and also provides post-retirement health care benefits to employees who meet the plan requirements for retirement. The Association's contribution expense relating to these healthcare benefits for the year ended August 31, 2021 was approximately \$79,000.

NOTE 7 PENSION PLAN

The Association participates in a pension plan maintained by the NEA. The plan covers substantially all of its employees. The Association makes contributions to the plan equal to their proportionate share of the plan's accrued pension expense. Actuarial present value of accumulated plan benefits for the entire plan of the NEA was greater than the market value of net assets available for benefits at January 1, 2021, the date of the most recent actuarial valuation. The most recent Pension Protection Act (PPA) zone status available in the year ended August 31, 2021 is for the 2021 plan year. As the plan was 91% funded as of January 1, 2021, the plan's zone status falls within the green zone as it is at least 80% funded. Information regarding the funding deficit liability and the accumulated plan benefits specifically for the Association is not available. The assumed rate of return used in determining the actuarial present value of accumulated plan benefits was 9.80 percent.

2020-2021 Independent Audit

ARIZONA EDUCATION ASSOCIATION
NOTES TO FINANCIAL STATEMENTS
Year Ended August 31, 2021

NOTE 7 PENSION PLAN (Continued)

The Association contributed approximately \$633,000 to the plan for the year ended August 31, 2021.

The Association has also established a 401(k) Plan for employees who meet eligibility requirements to elect to defer a portion of their salary into the plan. The Association did not make a contribution to the Plan for the year ended August 31, 2021.

NOTE 8 COMMITMENTS

The Association leases office space and equipment under operating leases expiring through April 2023 with approximate monthly payments of \$5,000.

Approximate minimum lease payments required under these leases consist of the following:

<u>Year Ended August 31,</u>	
2022	\$ 7,800
2023	<u>7,800</u>
	<u>\$ 15,600</u>

Total rental expenses under these leases and an additional month-to-month lease for office space for the year ended August 31, 2021 was approximately \$38,000.

NOTE 9 TRANSACTIONS WITH NEA

During the year ended August 31, 2021 the Association collected membership dues in the amount of \$3,302,724 and remitted them to NEA.

During the year ended August 31, 2021 the Association received \$1,440,124 from NEA for grants, joint projects, and expense reimbursements. The unspent portion of \$607,212 is recorded as deferred revenue – NEA grants on the accompanying statement of financial position.

2021-2022 AEA ETHNIC MINORITY ENGAGEMENT PLAN

Background

The Arizona Education Association (AEA) values diversity and has a strong commitment to educators of color representation, and leadership at all levels of the organization. According to the 2010 U.S. Census, Arizona's ethnic minorities represent 42% of the state's population. By comparison, there are 4,821 identified members of color within AEA's 2020-2021 membership, representing 27.5% of the total membership. Additionally, there are 1,332 members with an unidentified ethnicity, representing 7.6% of AEA's membership. In 2020, 25 educators of color represented AEA at the NEA Representative Assembly. The Bylaw 3.1(g) goal was 27.

AEA's commitment to an ethnically diverse membership and leadership is addressed within and beyond AEA's efforts to meet the proportional representation requirements described in NEA Bylaw 3-1(g). To be meaningful, the effort to increase the educators of color presence in the organization must be systemic rather than limited to addressing a single requirement. Therefore, strategies to comply with the NEA Bylaw 3-1(g) at the Representative Assembly are rightfully placed in a larger approach.

First, educators of color engagement efforts must be effectively integrated within AEA's leadership and professional development program. Second, in an organization that mobilizes its members to enter and shape discourse on widely varied issues, we must position educators of color issues and perspectives as important subjects of deliberation and policy, both for our members and the general public. We must develop and elevate the local association's role in building a truly inclusive and diverse organization.

GOALS

The Arizona Education Association Plan for Ethnic Minority Engagement outlines three primary goals that will be integrated into the AEA Strategic Plan:

1. Increase ethnic minority representation and leadership at all governance levels
2. Provide visibility and organizing opportunities around ethnic minority issues and concerns
3. Emphasize the role of the local in increasing ethnic minority membership and leadership

2021-2022 AEA ETHNIC MINORITY ENGAGEMENT PLAN

Goal 1: Increase ethnic minority representation and leadership at all governance levels.

Strategies

- A. AEA will investigate the feasibility of designing an educators of color leadership development program that emphasizes participation in local, state, and national leadership roles.
- B. AEA will investigate the opportunities available to provide leadership training for educators of color.
 - Investigate establishing a mentoring system for educators of color leaders.
 - Provide funding for educators of color members to participate in training and conferences.
- C. AEA will continue to monitor progress toward achieving these goals by utilizing data (surveys or assessments) from annual workshops, training, and conferences to meet compliance and improve on leadership development practices.

Goal 2: Provide visibility and organizing opportunities around ethnic minority issues and concerns.

Strategies

- A. AEA will provide opportunities for educators of color members to communicate and organize around issues and concerns.
- B. AEA will communicate with educators of color members regarding AEA information and articles that address issues of special interest including edCommunities.
- C. AEA will encourage participation at AEA / NEA events in order to promote educators of color participation in local, state and national conferences.
- D. AEA will collaborate with all educators of color caucuses to distribute information and provide organizing support.
- E. AEA will provide opportunities and resources for educators of color leadership participants to share and apply the skills gained at AEA / NEA events and trainings.

Goal 3: Provide emphasis on the role of the local in increasing educators of color representation and leadership.

Strategies

- A. AEA will include educators of color representation / leadership as an ongoing focus in local president communications and meetings, such as:
 - Include the Educators of Color Engagement Plan at the Local Presidents' Forums for discussion or for reference.
 - Provide strategies for encouraging members to verify and/or update their ethnic identification in AEA / NEA membership records as needed.
 - Continue to build a stronger connection between the association and members of color by having visible representation at the local/state leadership meetings.
- B. AEA will continue to include information related to educators of color representation as a component of local officer training.
- C. AEA will continue to promote educators of color participation at AEA Delegate Assembly and NEA Representative Assembly as an opportunity to participate in educators of color issues and concerns.
 - Provide information to local presidents about the history and importance of the NEA Bylaw 3-1(g), emphasizing the organizational imperatives of local participation in the activities leading to achievement. Recognize LEAs which meet NEA Bylaw 3-1(g).
 - Recognize LEAs annually at the Delegate Assembly who meet NEA Bylaw 3-1(g).

2022-2024 AEA LEGISLATIVE PLATFORM

PURPOSE AND PHILOSOPHY

The Association's goal is to fulfill the promise of a democratic society by promoting quality public education; advancing the education profession; expanding the rights and furthering the interests of education employees; and advocating human, civil, and economic rights for all. Our Delegate Assembly delegates set a broad platform for state legislative policy action reflecting the educational and societal concerns of our membership. The Legislative Platform provides the basis for legislative and policy initiatives that support our pursuit of AEA's Mission: *Keeping the Promise of Quality Public Education*. Our mission is focused on legislative policy that

- guarantees each child a free, safe, equitable, quality public education;
- recognizes that public school employees are central to educational excellence;
- supports community commitment to learning;
- recognizes and addresses racial and social justice;
- assures fairness, equity, and respect for students and school employees; and
- upholds educators as professionals.

THE PLATFORM

I. Quality Teaching and Learning

The AEA supports legislative and policy efforts that enhance the ability of students to be successful. The AEA advocates for and advances teaching and learning that emulate high standards for students, teachers and education support professionals. Quality learning for students cannot exist without quality teaching, education support professionals and adequate resources .

The AEA supports

- the creation of a Professional Standards Board to establish state standards for teachers;
- educators and administrators being professionally certified for their subject area and level;
- education support professionals being trained or certified based on the standards of their field;
- teachers certified by the National Board for Professional Teaching Standards being recognized by Arizona's process for certifying new teachers;
- lobbying through the appropriate means that the number of teachers serving on the state board of education be increased by at least one;
- school employee evaluation systems that promote professional growth and development;
- accountability systems that support authentic student learning utilizing multiple measures of student growth;
- charter schools being held accountable, using the same academic, fiscal, and professional standards as district public schools;
- voucher programs being held accountable, using the same academic, fiscal, and professional standards as district public schools;
- legislative support for local school districts' efforts to recruit and retain quality educators;
- legislative support for districts in developing quality professional development for certified and classified professionals;
- academic freedom;
- fully funded mentoring programs consisting of peer assistance and peer review;
- adequate funding for smaller class sizes, lower caseloads and appropriate student to school

2022-2024 AEA LEGISLATIVE PLATFORM

- counselor ratios based on current research recommendations and the needs of students;
- locally decided consolidation or unification of school districts based on the best interest of the students;
- student discipline policies that are consistent, appropriate, focused on restorative practices, and the social emotional well-being of all children;
- graduation requirements that are fair and appropriate;
- student promotion and retention being based foremost on what is best for the student;
- any state testing that is used to determine student growth should compare students to themselves and not be done with a ranking system comparing them to other students;
- educational teams including teachers making decisions regarding promotion or retention;
- internet access and student use of technology being made available to all students who follow appropriate and agreed-upon standards of use;
- technology being incorporated into a curriculum reflective of high standards for both students and teachers;
- a comprehensive approach to educating the whole child to be inclusive of arts, music, physical education and extracurricular activities
- professional development that promotes cultural competency, restorative practices, and social justice;
- the full implementation of a comprehensive health education curriculum statewide;
- the dissemination of information and programs that include the values, heritage, language, culture, and history of BIPOC and LGBTQ groups;
- all state and federal education mandates being fully funded and implemented;
- fair and appropriate education for children — including special needs, bilingual, and alternative education programs —in all state educational facilities;
- parental involvement in order to enhance and support student achievement;
- student personal information being made available to a teacher in a timely manner when such information aids in addressing the student's educational needs;
- high standards of teacher certification with appropriate flexibility in certification requirements to include AEA/ NEA endorsed pathways;
- decision-making school councils comprised of parents, teachers, and administrators;
- fully funded universal pre-kindergarten and full-day kindergarten;
- school enrollment between three and five years of age;
- certification assessments to include ones aligned with and appropriate to Arizona teaching standards;
- a safe and healthy learning environment for all students regardless of status in every public school in Arizona;
- all efforts to recruit and retain quality educators reflective of student populations; and
- curricula and programming that ensures the social emotional well-being of all students.

2022-2024 AEA LEGISLATIVE PLATFORM

II. Employee Rights and Working Conditions

School employee working conditions are student learning conditions. AEA supports the need to include employees in the deliberations concerning the school work environment.

The AEA supports

- a safe work environment free of abusive verbal, physical or other actions that ensures the social emotional well-being of all school employees;
- a safe return to school based on scientific metrics;
- a gun-free work environment (excluding law enforcement officers and sanctioned programs);
- public policy efforts that guarantee the rights of education employees to organize and advocate for improved working conditions and benefits;
- school districts involving employees directly in the decision-making process aimed at creating positive working and learning conditions;
- employees' right to have their professional association dues deducted from their paychecks;
- due process for all education professionals;
- school districts extending to part-time employees the same rights and benefits provided to full-time employees;
- nondiscriminatory, quality, affordable health benefits programs that include access to drug, alcohol, and mental health treatment;
- Affirmative Action;
- Open Meetings law;
- employee personal information being handled with the appropriate safeguards to ensure privacy;
- efforts that will bring collective bargaining rights to Arizona school employees;
- adequate leave for life events; and
- a workplace free of discriminatory practices.

III. Funding, Compensation, and Benefits

The AEA supports public policy that places improved funding for public schools, community colleges, and universities as a top priority. Financial resources should be distributed equitably and be substantial enough to demonstrate an investment in quality education in Arizona.

The AEA supports

- adequate, stable, and equitable funding for public school maintenance and operations, capital, desegregation, school infrastructure, and technology needs;
- a commitment by Legislators and the Governor to a 3-year plan to bring per pupil spending in line with the national average and to support equitable funding of Arizona's public schools;
- a commitment by Legislators and the Governor to a 3-year plan to bring school employee compensation in line with the national average;
- competitive employee compensation and benefits systems —commensurate with education and experience -- allowing districts to attract and retain quality employees;
- a living wage for all employees that avoids salary compression;
- permanent salary structure for all public school employees which includes annual raises and offering enhancements to the pay system for elements and accomplishments that positively affect educator quality and student learning;

2022-2024 AEA LEGISLATIVE PLATFORM

- a quality, stable, defined-benefit retirement system that provides a lifetime retirement income in alignment with the current ASRS practices;
- the same graded multiplier to educators who retired before August 11, 2001, that has been awarded to those retiring after 2001;
- a standardized accountability system for school district budgeting which takes into account all the components that comprise a fully-resourced and appropriately staffed worksite;
- state funding of universal pre-kindergarten and full-day kindergarten for every Arizona student;
- state funding for Community Schools;
- development and impact fees being assessed and used to most benefit local schools;
- tax structures that are fair, broad-based, stable, and in sync with our economy;
- educators should be paid for days worked (e.g., no trade days or similar compensation);
- quality, affordable, health care coverage for all active and retired public school employees; and
- legislation that funds the cost of fingerprint clearance cards for all school district employees.

IV. Human and Civil Rights

The AEA supports public policy that preserves and strengthens basic human and civil rights and eliminates barriers restricting the exercise of those rights.

The AEA supports

- the freedom from discrimination for all individuals;
- students' constitutional right to exercise Freedom of the Press;
- equal access to public education and healthcare for all children regardless of ability, ethnicity, religion, sexual orientation, gender identity, language, or immigration status;
- full funding for the educational resources needed to ensure the fulfillment of an equitable status for all students, regardless of ability, ethnicity, religion, sexual orientation, gender identity, language, or immigration status;
- basic protections against school discrimination on the basis of ability, ethnicity, religion, sexual orientation, gender identity, language, or immigration status;
- the designation of all Arizona schools as safe zones. Ensuring that every school is a safe place for students to learn, to thrive and to seek assistance, information, and support related to any immigration law enforcement that interferes with their learning experiences;
- the repeal of the English-Only instruction and replaced with a research-based language development curriculum;
- in-state tuition status for Deferred Action for Childhood Arrivals (DACA);
- a paid state holiday honoring Cesar Chavez; and
- students having access to the basic needs of being a 21st century learner.

2022-2024 AEA LEGISLATIVE PLATFORM

V. Political Involvement

School employees are community members, parents, and taxpayers. The informed action of our citizens is essential to preserving a democratic society. AEA believes every educational decision is a political one. Therefore, educators should be involved everywhere decisions are being made that impact students.

The AEA supports

- the basic rights associated with full involvement in the political system including registering to vote, using request to speak, and contacting legislators;
- the basic right for its members to seek political office;
- the basic right to form and participate in political action committees; and,
- “Take Your Legislator To School Day” as a means to get elected officials in the classroom to see the day-to-day work of our educators and education support professionals.

VI. Attacks on Public Education

The AEA supports public policy that invests in our public schools and the students they serve. AEA opposes efforts that eliminate or divert funds from public schools.

The AEA opposes

- The establishment, maintenance and expansion of taxpayer funded:
 - a) Empowerment scholarship accounts (i.e., vouchers)
 - b) Student tuition organizations (i.e., tuition tax credits)
 - c) For-profit charter schools and non-profit charter operators that financially abuse the system
- any reduction in revenue that would negatively impact the ability to fund public schools; and
- any privatization of Arizona's public school systems; and
- the reduction of professional standards for all school employees.

The AEA supports

- educating members and general public on the impact and influence of major, indirect private and corporate contributions, lobbyists, think tanks, and legislative exchange councils in leading attacks on Arizona public education policy, funding, and public pensions.

VII. Racial & Social Justice

The AEA recognizes the impact that systemic racism has on Arizona’s students and supports efforts towards the implementation of social justice practices.

The AEA supports

- the dismantling and elimination of systemic racism; and
- resources and curricula that represents the diversity of all student and the world in which they live.

2022-2021 AEA RESOLUTIONS

AEA's Mission: Keeping the promise of quality public education

Quality public education for all
Fairness, equity, and respect for all
Teaching as an esteemed profession (97)
Education Support Professionals as valued partners (12)
Learning as a community commitment (97)

A. QUALITY PUBLIC EDUCATION FOR ALL

1. Education of the Student

The AEA affirms its commitment to excellence in education in order to maximize educational opportunity for all children. The AEA supports efforts to diminish any and all barriers that impede access to quality education in rural and urban public schools. These include, but are not limited to, barriers of age, race, ethnicity, language, religion, nationality, learning ability, gender and gender identity, sexual orientation, and economic disadvantage. (21)

2. Human Rights and Civil Rights

The AEA supports the preservation, enhancement, and promotion of public education in order to ensure quality education and the protection of human and civil rights. (17)

The Arizona Education Association recognizes healthcare as a human right. (19)

3. At-Risk Students

The AEA supports the identification of at-risk students and further development of programs to meet their special needs. (17)

4. Language Diversity

The AEA recognizes that Arizona is a multilingual/multicultural state. The AEA believes that these factors provide us with a rich and diverse cultural environment. (01)

The AEA believes that bilingualism of our students enriches our state and provides additional opportunities for our students. (15)

The AEA recognizes that Arizona has a large population of English Language Learners (ELL) and students whose primary language is other than English. (01)

The AEA promotes second-language instruction for all Arizona students beginning in the primary grades and opposes the establishment of English as the official language of Arizona. (15)

5. Language Acquisition

The AEA believes that all students deserve equal access to an education and that opportunity must not be limited by a student's fluency in speaking a primary language other than English. The AEA believes programs that effectively promote English language acquisition to effect fluency in speaking, reading, and writing English are vital to providing an equal opportunity to learn.

a. *Guiding Principles*

The AEA believes that the following principles are critical to the success of any language acquisition program.

- i. All students deserve an equal opportunity to learn.
- ii. Early exposure to a second language increases students' opportunity for success.

2022-2021 AEA RESOLUTIONS

- iii. All stakeholders, including local associations, must be involved in the program development and implementation.
- iv. Accepted research in education must guide program development.
- v. Programs must integrate English and non-English speakers whenever possible to avoid the inherent discriminatory results of complete segregation. (17)
- vi. Programs must offer necessary English language instruction at the appropriate instructional level for the English language learners.
- vii. English language learners must receive content and English language instruction from teachers with an ESL, bilingual, or appropriate standards-based endorsement adopted by the State Board of Education.
- viii. Sufficient and equitable resources must be provided to schools and districts to implement the program successfully. (21)
- ix. Schools and districts are responsible for fully informing families of their rights to consent or waive program placement and to assist them in the waiver process.
- x. Schools and districts have the responsibility to accept or explain their rejection of a waiver request.
- xi. Districts have the responsibility to provide funding support for teachers pursuing necessary endorsements. (02)
- xii. AEA believes that language acquisition programs that adhere to the above principles will offer English Language Learners the opportunities for maximum success. (17)

b. Bilingual Education

The AEA recognizes that bilingual education provides English Language Learners (ELL) and students whose primary language is other than English with a proven opportunity to obtain equal access to the curriculum. The AEA supports and encourages the use of bilingual education when appropriate to meet the language needs of Arizona's students and to provide them with equal access to the curriculum. (02)

6. Education of Refugee and Undocumented Children and Children of Undocumented Immigrants (17)

The Arizona Education Association believes that, regardless of the immigration status of students or their parents, every student has the right to a free public education in an environment free from harassment including safe passage to and from school. Further, schools should provide safe and stable learning environments for all students regardless of their immigration status.

AEA encourages all schools to be recognized as safe zones for their students. A safe zone means that every school is a place for students to learn and thrive free from fear of immigration status. Additionally, it is a place for stakeholders to seek assistance, information, and support related to any immigration law enforcement agency interfering with the learning experience of students.

The Association also believes neither educational systems nor their employees are responsible for the determination and enforcement of legal residency status. Thus, the Association opposes immigration and customs enforcement operations on school property.

The Association further believes that all parents should have access to services provided by the school system regardless of immigration status. The Association supports access to higher education for undocumented students and access to financial aid and in-state tuition to state colleges and university in the states where they reside.

2022-2021 AEA RESOLUTIONS

7. Open Enrollment / Parental Choice

The AEA believes that any open enrollment/parental choice program must not result in de facto resegregation. (10)

The AEA further believes that open enrollment cannot be in and of itself the vehicle for any improvement program unless it provides a variety of experiences and opportunities for every student that will result in improved quality education and student achievement, strengthened collaborative local control and public accountability over schools, and improve racial, ethnic and socio-economic balances in the public schools. (10)

8. Extracurricular Activities

The AEA supports participation in student activities including extracurricular activities which help in the development of students' attitudes, skills, and appreciation of diversity. The AEA urges establishment of academic support programs which will help students meet academic standards. (00)

The AEA supports the formation of Future Teacher Clubs and the recruitment of highly qualified students into these clubs and the teaching profession. (91)

9. Freedom of Student Press

The AEA believes that freedom of the press is basic to the preservation of a democratic society. We place a high priority on supporting and teaching objectivity in reporting.

The AEA further believes that public school officials should not unnecessarily limit freedom of the press. (17)

10. Technology in the Educational Process

The AEA recognizes the advancement and application of instructional technology, telecommunications technology, and other high-technology devices and materials that provide new opportunities for developing skills, furthering research, and expanding knowledge in our society. (08)

a. *General Technology*

Technology increases the opportunity to reduce educational inequities within and among schools and school districts. The AEA believes that local associations should support efforts to use technology to improve the quality of instruction in local schools, to enhance the working conditions of their members, and to protect members' rights. The AEA further believes that technology should be used to enhance the roles and instructional opportunities of education employees. Effective use of technology, including distance learning, requires a licensed teacher in every classroom. Instructional technology should be used to support instruction.

The AEA encourages federal funding of school technology programs, with increased funding from state and local government sources and public/private partnership funding to stimulate and support the purchase and proper use of emerging technologies. (08)

The AEA believes maintenance, technical support, training, evaluation, and staffing must also be fully funded and readily accessible. (08)

b. *Technology Device & Internet Access*

The AEA believes the priority of technology device resources should have a specific focus on Native American students, rural students, and students living in underserved communities. (21)

The AEA believes that all students should have equal access to high-speed, seamless classroom, and library/media center Internet service. (10)

2022-2021 AEA RESOLUTIONS

The AEA also believes that education employees are essential to the development of an acceptable-use policy (AUP) and to the appropriate use of the Internet.

The AEA further believes that an AUP that requires the signatures of parents/guardians and students must be in place before allowing student access.

The AEA believes that Internet access and activities should be age appropriate, monitored, and should foster critical use. Any documentation material produced as a result of Internet access should be properly cited and comply with copyright laws. (01)

AEA believes in the development of social networking tools compliant with district acceptable-use policies. This will allow for student communication, collaboration, and activism, advancing the pursuit of positive, student-initiated community change. (09)

11. Auxiliary School Employees

The AEA advocates the employment of the following positions in schools in addition to the traditional school employees. (91)

a. *Social Workers*

The AEA advocates the employment and use of full-time licensed school social workers to help students to resolve a wide range of social and personal problems which interfere with learning and instruction. (12)

b. *Professional School Counselors*

The AEA advocates the employment of at least 1 (one) full-time professional school counselor per 300 students at each site. Professional school counselors will provide a comprehensive program of education and support in the academic, social-emotional, and career domains.

AEA believes that all professional school counselors should be appropriately certified and have completed a Counseling Masters program. (17)

c. *Librarians/Media Specialists*

The AEA supports legislation funding that will enable school districts to have a full-time certified school library media specialist at each school and to have the resources necessary to implement the guidelines for school library media programs as developed by the professional library/media organizations. (12)

d. *Nurses and Health Professionals*

The AEA advocates the employment of certified school nurses and certified nurse assistants. The AEA further believes that licensed certificated nurses, because of their nursing knowledge, academic preparation, and professional skills, can develop and maintain a total health care program within the school environment. (17)

The AEA believes that providing quality health related services insures the health and well-being of each child. A professionally staffed school health department will enhance the educational process by removing this responsibility from teachers and other staff members and creating a supportive and orderly school environment. (17)

The AEA advocates that to maintain these standards, the ratio for school nurse staffing should be

1:750 in general school populations,

1:225 in mainstreamed populations, and

2:100 in severely/profoundly handicapped populations. (95)

2022-2021 AEA RESOLUTIONS

e. *Psychologists*

The AEA believes that each school district should employ a credentialed psychologist to deal with students requiring special services. These psychologists should be available to educational staff for individual and group consultations. (12)

f. *Therapists*

The AEA endorses the employment of licensed speech-language, occupational, and physical therapists. These professionals improve children's skills and support special and general educators. (12)

12. Discipline

The AEA believes that all students have a right to an orderly learning environment.

The AEA believes that effective discipline and its implementation by all school authorities is essential in promoting optimum learning. Effective discipline enhances high expectations and quality instruction, thereby promoting self-control and responsible behavior in students. School district governing boards in conjunction with local affiliates should develop policies and standards that provide the necessary administrative support to school employees for the maintenance of a positive school environment. Once policies and standards are in place, guidelines for effective disciplinary techniques should be developed. This entire process should have the involvement of administrators, teachers, educational support professionals, parents, and students. (01)

13. Student and Staff Well-Being

The AEA believes that a comprehensive approach to student and education employee safety is paramount to a quality education. This should include physical, social, and emotional safety. Appropriate agencies must use their authority to ensure such conditions. (21)

14. Safe Schools

The AEA believes that students and education employees must be safe from violence, including hate crimes. Appropriate agencies must use their authority to prevent school-related violence. (17)

The AEA further believes students who commit acts of violence, hate crimes, or who bring weapons to school should receive an alternative education with appropriate counseling in a setting that protects other students and school employees from acts of violence. (01)

The AEA believes that districts should create safety plans and that the legislature should provide appropriate funding to support those safety plans, including funding school resource officers. (14)

The AEA believes that school resource officers should work with all students to build rapport and trust, teach classes on conflict resolution, drug use, crime prevention, and support efforts to prevent the school to prison pipeline. The use of school resource officers in any school should come from a site or district wide stakeholder decision process, including voices of students, educators, and community members. (21)

15. Weapons

The AEA believes that firearms and other items used as weapons represent an extreme danger in a school setting. The AEA believes that no education employees, other than certified law enforcement officers, should be required to carry firearms on school grounds. (15)

16. Gang-Related Activity

The AEA believes that the education community has a critical role in reducing gang-related activity. The AEA supports education programs that promote academic success--such as post-secondary education, dropout prevention/ intervention, before- and after-school programs, and job training--particularly for at-risk students in areas where there is a high degree of gang-related activity. (04)

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The AEA further believes that it is the role of federal, state, and local governments to provide the necessary resources for the development and implementation of education and youth employment programs in helping to reduce gang-related activity. (01)

17. Physical/Sexual Assault Disclosure

The AEA believes that institutions of learning should truthfully disclose the number of physical/sexual assaults occurring on their campuses. (01)

18. Crisis Plan

The AEA believes that a crisis plan must be developed and updated where applicable at district and individual site levels by a committee made up of relevant stakeholders to address all manner of crises that may affect the school site. This crisis plan must be appropriately shared so that all stakeholders know the plan and what to do in case of an immediate or long-term emergency. This crisis plan must be provided to appropriate agencies which might be called upon in a crisis situation. (21)

19. Academic Standards

The AEA believes in rigorous academic standards that describe clear expectations for what students should know and be able to achieve. The AEA believes the state and local affiliates and other educational stakeholders should participate in the planning, development, implementation, review, and refinement of these standards.

The AEA further believes:

- a. Curriculum and assessment should be aligned to the required academic standards;
- b. Standards should be implemented in a manner that allows educators to adapt their practice and work collaboratively to maximize student achievement;
- c. Education employees should be afforded contract time and/or additional compensation to collaborate regularly with colleagues to analyze student work and data informing instructional practice;
- d. Appropriate attention should be given to each students' progress toward attaining the standards and to his/her needs and developmental level;
- e. On-going professional development should be provided for all education employees to effectively implement standards; and
- f. Full funding and resources should be provided for the implementation of standards. (15)

20. School Programs

The AEA advocates and supports the development of the following programs in schools. (91)

a. *Adult Education*

The AEA supports programs that develop literacy skills for all members of society. The AEA supports lifelong learning for adults through public school and post-secondary institutions.

The AEA supports the concept of tax-supported post-secondary education that responds to citizen interests and demand with non-college-transfer courses related to current and evolving interests that are reflective of the changing ideas of personal development and occupational growth in today's world. (89)

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b. *Diversity/Multicultural Opportunity*

The AEA advocates the development of locally controlled diversity, multicultural, ethnic, and gender studies programs; and the use of curricula that recount accurately the contributions of all groups to the development of the United States. (08)

c. *Elimination of Stereotyping*

The AEA advocates the use of instructional materials that eliminate all stereotypes and portray various career and personal roles as acceptable and attainable for all individuals. The AEA urges local associations to monitor the elimination of bias against gender, race, sexual orientation, and creed from textbooks and other curricular materials. (11)

d. *Gifted, Talented, and Creative Students*

The AEA believes there must be increased development of fully funded educational programs for gifted, talented, and creative students. The AEA recognizes its responsibility to aid educators in selecting reliable methods of identifying and teaching these students. The AEA also believes that training programs in gifted and talented education must be provided for all educators. The AEA encourages such programs and methods to ensure that these special-need areas are met. (00)

e. *Integration of Students with Disabilities*

The AEA believes that integrating students with disabilities may be beneficial to all students. The AEA supports a free, appropriate public education for all students with disabilities in the least restrictive environment, which is determined by maximum teacher involvement and includes a full continuum of services. To successfully achieve integration of students with disabilities, the AEA believes that the following must occur:

- i. Communications need to be maintained among all Individualized Educational Plan (IEP) team members on an ongoing basis to monitor the needs of all students involved. Classroom teachers will have scheduled access to resource personnel in addition to their regular planning time.
- ii. Professional development programs are provided to prepare all staff for their roles.
- iii. Appropriate funding and resources are provided for integrating students with disabilities. The funding needs to provide for appropriate instructional materials, support services, personnel, modifications in scheduling, class size, and curriculum design to meet the needs of all students.
- iv. The administration is supportive of program implementation and open to the creative measures needed in meeting the challenges of integration.

The AEA believes that when the above conditions occur, integration of students with disabilities will be productive for all children. The AEA strongly supports the development of appropriate individualized education programs in the least restrictive environment. (94)

f. *Intergenerational/Age Awareness*

The AEA supports age awareness materials to be integrated into existing curriculum to educate and sensitize all levels of education.

The AEA supports intergenerational programs where older adults can model healthy aging by volunteering and contributing to students and faculties in a variety of ways.

The AEA encourages the development of service-learning opportunities where students can learn through direct service to aging members of their community. (90)

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- g. Suicide Prevention*
The AEA supports the development of a comprehensive program within each school district which informs and educates school employees, students, and parents on suicide prevention. (15)
- h. Alternative Programs*
The AEA supports alternative programs to assist students in achieving their education goals. (94)
- i. Dropout Prevention*
The AEA supports the establishment of district policies and programs and conditions which encourage and assist students to remain in school and not be compelled to drop out. (17)
- j. Character Education*
The AEA supports the teaching of values and character development. (17)
- k. Substance Abuse Rehabilitation*
The AEA advocates the development of a comprehensive program within each school district which informs and educates students and parents on the subject of substance abuse. (17)

The AEA favors state support of substance abuse rehabilitation programs.
- l. Child Abuse Awareness and Prevention*
The AEA supports the development of educational programs to promote awareness and prevention of child abuse. (17)

21. Curriculum Content (11)

The AEA advocates and supports the development and teaching of the following curriculum content in schools in addition to the traditional core subjects: (11)

- a. Life Skills*
The AEA supports the establishment of curricula that develops life skills and parenting skills including: (11)

 - i. flexible scheduling and attendance policies to assist pregnant adolescents and adolescent parents in completing their education;
 - ii. appropriate guidance in continuing education and productive employment;
 - iii. promotion of sound health principles regarding nutrition, substance abuse, exercise, family planning, and parenting skills; and
 - iv. establishment of on-site child care services. (92)
- b. HIV/AIDS and Other Communicable Disease Education*
The AEA advocates the establishment in all school districts of a comprehensive education curriculum on HIV/AIDS and other communicable diseases. This curriculum should include accurate information on the prevention of such diseases. (17)

This curriculum must be presented in the language of the student and that the content be age appropriate. (17)
- c. Career and Technical Education*
The AEA advocates legislative support, including appropriate financing of career and technical education. (08)
- d. Literacy Instruction*

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- The AEA believes in literacy instruction that meets individual student needs and is appropriate for students' developmental levels. The AEA supports literacy instruction that is supported by empirical and naturalistic research in language and literacy development. (11)
- The AEA supports the use of authentic literature for literacy instruction. (89)
- e. *Fine Arts*
The AEA believes that the fine arts are basic to education and have great value in and of themselves for the knowledge, skills, and values they impart. (05)
- The AEA further believes that every public school should offer a balanced, sequential, and high-quality program of instruction, taught by teachers certified in fine arts and strengthened by artists and arts organizations as an essential component of the curriculum. (15)
- The AEA advocates providing appropriate state funding and coordination of all areas in the fine arts including, but not limited to music, drama, dance, speech and debate, and the visual arts in grades K-12. (05)
- The AEA advocates that local governing boards include the performing and practical arts in district curricula, taught by appropriately certified/highly qualified personnel. (11)
- f. *Health, Physical Education, and Recreation*
The AEA believes that health, physical education, and recreation curricula are an integral component of the curriculum in grades K-12. (11)
- The AEA further believes that all students should receive properly funded and quality PE instruction by a certified PE teacher. (15)
- g. *Global Issues Education*
The AEA believes that age-appropriate instruction and materials concerning global education, national security, worker and economic issues, conflict management, and world peace should be included in the curriculum of every school district in Arizona. (00)
- h. *Ethnic Studies*
The AEA supports the dissemination of information and programs that include the values, heritage, language, culture, and history of ethnic groups.
- The AEA encourages the involvement of ethnic educators in developing educational materials used in classroom instruction.
- The AEA supports coordination with ethnic organizations and concerned agencies that promote the values, language, culture, and history of ethnic groups.
- The AEA believes that the infusion of ethnic studies and ethnically diverse curricula into the instructional program acknowledges the contributions of all ethnicities to history. (15)
- The AEA further believes that these curricula must show a correlation among social, historical, political, and economic developments and events regarding all ethnic groups and their descendants worldwide. (10)
- i. *Energy Conservation*
The AEA urges support for all activities which teach and promote energy conservation within school districts.
- j. *Theory of Evolution*
The AEA supports the teaching of the scientific theory of evolution in schools. (92)

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k. *Environmental Education*

The AEA advocates the use of instructional materials that teach and promote environmental education within school districts. The AEA will actively support recycling programs in schools and communities. (93)

l. *Election Education Issues*

The AEA urges support for all activities which teach and promote the understanding of and involvement in public issues and the voting process. (90)

m. *Holocaust*

The AEA believes that a way to prevent events such as the Holocaust is to teach all children at all levels of instruction about the Holocaust not only as an historical event but also as a means of providing knowledge and insight into how inhumanity of this magnitude develops.

The AEA further believes that the lessons of the Holocaust must be taught so that doubt of its occurrence can never again be raised, and never again can such action occur resulting from bigotry and prejudice. (89)

n. *Genocide Prevention*

The AEA believes that a way to prevent genocide in the future is to provide knowledge of those events and their relationship to bigotry and prejudice. (89)

o. The AEA supports student demonstrations and social actions that are consistent with the beliefs and practices of unions in general and our Association in particular. (06)

p. The AEA believes in the use of service learning as a teaching and learning strategy with students of all ages and abilities in order to increase student achievement and engagement, teach civic responsibility, and strengthen the community. (09)

q. The AEA supports and encourages local affiliates to request districts to develop courses designed to help students write résumés, do well in job interviews, take tests, and develop verbal and writing skills. (89)

22. Accountability

The AEA recognizes that the term accountability, as applied to public education, is subject to varied interpretations. The AEA maintains that educational excellence for each child is the objective of the educational system.

The administration of a standardized test and/or assessment includes the responsibility to educate the stakeholders about the purpose of the test, the meaning of the test results, and the accurate interpretation of its conclusions. (16)

The AEA believes that any method of accountability developed for school employees must be commensurate with the degree that they share responsibility in educational decision making and to the degree that other parties who share this responsibility--legislators, other government officials, school boards, administrators, parents, students, and taxpayers--are also held accountable.

The Association further believes that students, parents/guardians, teachers, administrators, schools, and school districts should not be penalized for parents/guardians exercising their legal rights to exempt their children from standardized tests and/or assessments. (16)

The AEA maintains that there should be no single accountability system. It opposes any attempt to transform assessment results into a state testing program that would seek to measure all students, teachers, or school systems by a single standard. (05)

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23. Assessment

a. *Student Assessment*

The AEA believes that student assessment is one part of the total education process and should enhance other educational practices. A student's level of performance is best assessed with authentic measures directly linked to the lessons taught and materials used by teachers. (16)

The AEA believes that effective student assessment must be focused on more than students demonstrating minimum competencies but rather on students' abilities to use critical and analytical thinking in all subject areas. The AEA believes that students should be assessed using a variety of assessment methods. Teachers must have significant involvement in determining the plan for assessment at both the district and the school site.

The AEA supports a statewide comprehensive system of student assessment which has been mutually agreed to by the association and state officials. This system must include appropriate funding for training and re-training, materials and equipment, time to administer, score and acquaint students with the assessment format. The assessment should be bias free, reliable and valid. The AEA believes that testing is a tool to diagnose learning needs, prescribe instructional activities and measure student progress in content areas. (16)

b. *Standardized Assessment of Students*

The AEA believes that standardized assessments should only be used to improve the quality of education and instruction for students. When an assessment is mandated at the district, state, or national level, it should only be used to evaluate programs in an effort to meet district, state, or national standards. (08)

The AEA believes that students should not be required to pass a state-mandated assessment as a condition of graduation. (08)

Standardized assessments (including norm- and criterion- referenced assessments) are most useful and valuable when (15)

- i. they are selected by educational professionals closest to the classroom;
- ii. they are integrated with assessment information specific to local programs;
- iii. they are not used as the single criterion for the reduction or withholding of any education funding;
- iv. the results are not used to compare students, teachers, programs, schools, communities, and states;
- v. the results are calculated and distributed to all stakeholders in a timely manner; (16)
- vi. they are not used as a single criterion for high-stakes decision making; (16)
- vii. they match the developmental levels or language proficiency of the student;
- viii. programs are not specifically designed to teach to the assessment; (08)
- ix. student scores are not used as a single criterion to evaluate teachers or to determine employment status;
- x. testing programs or assessments do not limit or supplant instruction time; (08)
- xi. test preparation does not impede or discourage learning, nor constrain the curriculum in ways that threaten the quality of teaching and learning for students; (16)
- xii. students are not assessed before third grade. (08)

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The AEA believes that ELL students should be assessed in core subject areas appropriate to their proficiency level and allowed to use the language/subject area tools and resources normally available to them for taking and passing state-mandated assessments. (08)

c. *Accountability for Student Achievement*

Although some accountability for student achievement and success lies within the purview of the individual classroom teacher, there are other factors and agents which play critical roles in student achievement and success.

- i. The legislature must provide appropriate funds and resources.
- ii. School districts must provide sufficient and accessible support and training.
- iii. All education staff, certified or classified, regardless of specific assignment, must contribute to a positive education environment.
- iv. Parents and other community members must be supportive and involved.
- v. All stakeholders must be cognizant of the purpose of the assessment as well as the accurate and appropriate interpretation of results, and apply that knowledge in the best interest of students. (02)

The accountability for student achievement and success goes beyond the individual classroom. It includes the responsibility of the legislature to provide appropriate funds and resources and school districts to provide support and training. Parent as well as community support and involvement are vital components in the successful education environment. (93)

24. Early Childhood Education

The AEA supports developmentally appropriate education as specified by the guidelines of the National Association for the Education of Young Children for all preschool through third grade students and urges all school districts to develop and implement programs. (90)

The AEA further supports voluntary all-day kindergarten for children at five years of age in August of the year enrolling and believes that the state should fund all-day kindergarten for all districts. The AEA further believes that the state should fund preschool programs for three- and four-year old children. (05)

25. Employment of Students

The AEA supports and encourages programs and policies which increase the awareness and sensitivity of employers and parents to the needs of all employed students, specifically their working hours and the impact on their performance in school.

The AEA supports and encourages the awareness and sensitivity of school staffs to the needs of students who must be employed because of family, educational or career requirements. (89)

26. Student Evaluation

The AEA recognizes, as an aspect of academic freedom, the right of classroom teachers to be authorized to decide upon criteria for evaluating and assigning grades to students and the AEA believes that teachers should have the delegated authority in all such evaluations. (93)

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27. Charter and Nontraditional Public School Options

The AEA supports innovation in public education. The Association believes that when concepts such as charter schools, year-round schools and other nontraditional school options are proposed, all school employees must be directly involved in the design, implementation and governance of these programs.

The Association believes that charter schools and other nontraditional schools should provide each student with a quality education free from tuition and fees and with the same safeguards, health and safety standards and civil rights for students with disabilities as mainstream public schools. Furthermore, charter and nontraditional public schools should:

- a. provide appropriate safeguards covering contract and employment provisions for all employees. Such safeguards should include being subject to the same legal requirements for job protection as mainstream public school districts.
- b. be staffed with certificated and appropriately qualified personnel as required for mainstream public schools.
- c. not be granted authority to inhabit, rent, lease, or purchase available space from traditional public schools.
- d. not be operated for personal profit of their managers and owners.
- e. not divert current funds from regular public schools. (19)

28. Class Size

The AEA believes that high class sizes and caseloads negatively impact student achievement. The AEA supports class sizes and caseloads that are research-based and that take into account student needs, grade levels, content matter and facility/classroom capacity. (14)

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B. FAIRNESS, EQUITY AND RESPECT FOR ALL

1. Fairness and Respect

We believe that every person is entitled to be treated fairly and with respect. Students and school employees should be honored for their differences in culture, history, language, religion, physical condition, ethnicity, gender, sexual orientation, ability, and learning styles. These differences enrich our society. (19)

2. Desegregation

The AEA actively opposes all segregation and urges complete integration of all school employees and student bodies throughout the state. The AEA urges school districts to appoint and assign staff to develop and implement human relations programs. The AEA further believes it is imperative that full integration of the state's schools be effected wherever there is de facto segregation or racial imbalance. (12)

The AEA opposes any attempt to delay or impede legal implementation of desegregation orders. (94)

The AEA recognizes that acceptable integration plans may feature a variety of approaches including affirmative action programs. (12)

The AEA opposes any displacement, demotion or advancement of school employees made on the basis of gender (including sexual orientation, gender identity), race, or ethnic origin. It also opposes actions by boards of education to finance integration plans through reduction of school employees. (17)

The AEA supports local affiliates' efforts to assure that school employees, parents and students are involved in the development of plans designed to achieve integration. It urges the provision of federal and state funds necessary to implement integration programs, including, if necessary, funds for student transportation. The AEA supports participation in citizen advisory committees consisting of school employees designated by the local association; parents and representatives of community organizations; business; clergy; and media. These committees should reflect the ethnic makeup of the community in developing, implementing and evaluating student desegregation plans. (15)

3. Systems of Discrimination and Exploitation

As members of the global community, the AEA believes that governments of all nations must respect and protect the basic human and civil rights of every individual. The AEA deplores any system that limits or prohibits the free and responsible exercise of these rights. The AEA condemns any system that allows actions of discrimination and exploitation, and believes sanctions against countries allowing such actions are both justified and necessary. (02)

The AEA further believes it has a firm commitment to the protection of children from exploitation of the sex slave trade industry. (08)

The AEA further urges divestiture of public monies in countries or in corporations that do business with such countries that have systems which allow actions of discrimination and exploitation to continue. The AEA believes in monitoring the investment of members' dues to ensure that such investments do not support countries that have systems that allow actions of discrimination and exploitation or corporations that do business with such countries. (15)

4. Racial Justice and Equity

The Arizona Education Association believes that to strengthen our society as a whole, equitable opportunities and outcomes must exist to ensure systematic fair treatment for people of all races. The AEA recognizes the policies and laws that created biased practices and have detrimental

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effects on our students and educators in their schools and communities. The Association believes that honest and open conversations about the sources of institutional racism that continue to threaten equity, fairness, and justice are necessary to produce the critical changes needed to achieve racial justice and equity. The Association encourages its locals to work with family and student partners to develop, initiate, and promote programs that will lead us to repair, heal, organize, and advocate to achieve racial justice and equity so that every student and educator may fulfill their full potential. (18)

5. Cultural Respect for All

The Arizona Education Association believes that in order to strengthen our society as a whole, equitable opportunities and outcomes must exist to ensure respectful treatment for people of all cultural backgrounds. The Association recognizes that certain policies and laws contribute to cultural insensitivity and may also threaten equity, fairness, and justice. The Association encourages its locals to have honest and open conversations about the sources of cultural insensitivity with community, family, and student partners so that every student and educator may feel respected. (21)

6. Self-Determination of Indigenous People

The Arizona Education Association recognizes that Native Americans are members of sovereign nations with the rights of self-determination and sovereignty.

The Association also recognizes that sovereignty includes the right to provide for culturally appropriate education of Native American students guided by tribal cultural and educational leaders. (21)

7. Indigenous Peoples' Day

The Arizona Education Association believes that the history of colonization needs to be recognized and acknowledged in every community. To do so, the Association believes that the name of the current holiday known as "Columbus Day" should be renamed and recognized as "Indigenous Peoples' Day" in recognition of early indigenous peoples before colonization by European settlers. (21)

8. Use of Prejudicial Terms and Symbols

The Arizona Education Association believes prejudice is deplorable and the use of names, symbols, caricatures, emblems, logos, and mascots that promote prejudice should be discontinued. (21)

9. Immigration

The AEA believes fair immigration policies enhance the community.

The AEA supports immigration policies that guarantee human and civil rights and protect the integrity of the family unit without discrimination.

The AEA believes that immigration policies should include due process, political asylum and timely legalization without regard to national origin. (95)

10. César Chávez Day

The AEA supports the designation of a César Chávez Day. This should be a day dedicated to the study of the beliefs, philosophies, and issues to which César Chávez devoted his life. (02)

11. Diversity in Employment

The AEA believes that a diverse society enriches all individuals. Similarities and differences that form the fabric of a society include but are not limited to race, ethnicity, color, national origin, language, geographic location, creed, gender, sexual orientation, gender identification, age, physical ability, size, occupation, and marital, parental, or economic status. (11)

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The AEA condemns employment and/or advancement discrimination based on the above criteria. (11)

The AEA believes that diverse school district staffs are essential and urges school districts to actively recruit, hire, promote, and retain diverse education employees. (06)

12. Affirmative Action and Seniority

The AEA encourages local affiliates to pursue affirmative action plans in their school districts. The AEA encourages the development of a published annual report on their school district's recruitment policy and minority employment status including the number of women and ethnic minorities in administrative positions and the number of men and women in non-traditional roles. (17)

The AEA believes that seniority and affirmative action should be considered when making employment decisions. If it is necessary to make some accommodation between the two concepts, the AEA will be guided by the following principles. (17)

- a. The AEA believes that seniority provides an objective and equitable standard on which to base employment decisions, including decisions regarding hiring, transfer, promotion and layoff. (07)
- b. The AEA's commitment to seniority is strong, but not absolute. It may be necessary to give preference in recruitment, hiring, retention and promotion policies to overcome past discrimination. (06)

13. Equal Rights Amendment

The AEA strongly supports the adoption of an equal rights amendment that grants equal rights to all men and women.

14. Non-Discrimination

The AEA believes in the passage of the Employment Non-Discrimination Act (ENDA) to provide job security for all Americans, to prohibit discrimination in hiring and employment on the basis of sexual orientation and gender identification by employers. (17)

15. Harassment, Intimidation, Bullying, and Prejudice

The AEA believes that schools should be safe from all forms of harassment, intimidation, bullying, and prejudice. Schools should provide staff training on diversity awareness and develop both staff and student programs to promote, implement, and maintain a safe and positive school environment. Safe schools should show respect for all students and staff regardless of similarities/differences that include but are not limited to the following: race, ethnicity, color, national origin, language, geographic location, creed, gender, sexual orientation, gender identification, age, physical ability, size, occupation, and marital, parental, or economic status. (15)

16. Conversion Therapy

The AEA believes the use of conversion therapy is harmful to the emotional development of gay, lesbian, bisexual, and transgendered students and should not be used or recommended to parents. (15)

17. Sexual Harassment

The AEA believes that sexual harassment is a form of sex discrimination or abuse. (12)

The AEA further believes that education employees and students should be protected from sexual harassment. The AEA encourages its affiliates to work with local school districts, institutions of higher education, and appropriate alliance groups to

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- a. establish strong policies defining and prohibiting sexual harassment;
- b. develop educational programs and curricula designed to help people recognize, understand, combat, prevent, and eliminate sexual harassment; and
- c. develop and publicize a grievance procedure that encourages the reporting of incidents of sexual harassment, resolves complaints promptly, protects the rights of all parties, and provides a mechanism to address false accusers. (03)

18. Title IX

The AEA believes the State Department of Education should enforce district compliance with Title IX. The AEA also believes local associations should monitor negotiated agreements for compliance with Title IX. (17)

19. Collective Bargaining

The AEA actively seeks the enactment of a public employees' collective bargaining law. The AEA actively opposes any legislation which would prohibit or limit the rights of public employees.

The AEA believes in, as one of its highest priorities, the right of each local affiliate to secure a comprehensive collective bargaining agreement with its governing board. The AEA supports local affiliates in lawful actions, including strikes, directed toward this end. (88)

20. Right to Organize

The AEA believes that all people have the right to organize to achieve an improvement in their living conditions through their own free and independent unions and organizations. The AEA further believes that local associations should strengthen their members' rights to organize. (17)

21. Association Participation

The AEA believes that every school employee has the right and obligation to participate fully in the professional association. School policies should provide release time without loss of pay to school employees fulfilling leadership responsibilities in professional organizations or attending professional meetings.

The AEA strongly supports the establishment of an association mentor program by staff, leaders, and local associations that will recruit, train, and assist ethnic minorities in their association involvement. (11)

The AEA believes in providing at least proportionate minority membership in every phase of governance. The AEA encourages women and ethnic minority school employees to enter leadership training programs. (02)

22. Continuing Employment and Fair Dismissal Practices

The AEA believes Arizona statutes must provide for the continuing employment of all school employees. The AEA shall work to improve continuing contract provisions and shall oppose efforts to weaken or deny such protection to all school employees. (17)

The AEA believes that such statutes should include but not be limited to the following provisions for all employees:

- a. appropriate written notice of hearing including charges;
- b. representation by legal counsel with the right to cross-examine witnesses and present evidence;
- c. dismissal or non-renewal based on just cause; and

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- d. retention of continuing status by any certificated employee who has achieved the rights of a continuing teacher if assigned to a non-teaching, non-administrative position or if assigned to a part-time position.

The AEA urges its local affiliates to bargain fair dismissal procedures in their agreements. (88)

23. Reduction in Force

The AEA believes local affiliates should bargain criteria to be utilized whenever reduction in force (RIF) occurs. Criteria should include seniority, objectivity, nondiscrimination, affirmative action and uniformity of application.

The AEA further believes that recall procedures should be established in which staff would be recalled in the reverse order in which they were laid off. (00)

24. Liability/Hold Harmless

The AEA believes that all costs of defending any legal action brought against an employee for any act or omission arising out of and in the course of the performance of his/her duties, should be defrayed by the governing board and the governing board shall hold harmless and protect such persons from any financial loss. (11)

25. Local Human and Civil Rights Activities

The AEA strongly advocates the establishment of human and civil rights committees in all of its local affiliates. (92)

These committees should develop awareness of human and civil rights issues and enable members to take part in human and civil rights activities within their local. (17)

26. Right of Privacy

The AEA supports the right of privacy and confidentiality for school employees. (05)

27. Personal Freedom

The AEA believes that the private, non-school-related lives of school employees must not be used as factors in their employment or evaluation. (88)

28. School Environment

The AEA believes that school employees require a comfortable, professional and collegial environment. The AEA advocates conditions in the workplace which would be conducive to maximum learning. As a minimum these conditions shall include:

- a. environmental control which would allow for appropriate physical comfort for all employees; (08)
- b. duties commensurate with the level of preparation for all employees;
- c. length of day determined by professional duties while still allowing time to plan, teach and eat;
- d. research-based class sizes; (17)
- e. appropriate supplies for class size; (17)
- f. accessibility of facilities to the disabled; and (11)
- g. access to technology and to high-speed and seamless Internet services. (10)

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29. Teacherage Housing

The AEA believes that school districts should be required to maintain their teacherage housing in a safe and well-functioning manner and follow all applicable state housing/renter laws and regulations. (14)

30. Political Involvement

The AEA shall afford direct and immediate assistance to those locals needing further political education of their membership. (94)

31. Political Participation

The AEA believes that every school employee has both the right and obligation to be an informed and politically active citizen and strongly advocates the removal of all barriers to the free exercise of these rights. (94)

The AEA believes school employees should register and vote, participate in political organizations, perform jury duty, campaign for and contribute to candidates, lobby, run for and serve in public office. Provision should be made to enable school employees to serve in public office without personal loss or curtailment of increments, tenure, retirement or seniority.

The AEA is strongly opposed to any harassment or pressures exerted against school employees who pursue legal political activities or who exercise their rights of freedom of speech. (95)

The AEA believes it is the duty and responsibility of school employees to involve themselves in the election of qualified candidates who support quality education. (17)

The AEA believes that all members should contribute to political action through local political action committees, The AEA Fund for Public Education, and The NEA Fund for Children and Public Education. (17)

32. Structures for Decision Making

The AEA supports the development of organizational structures which guarantee substantive and demonstrable employee participation in decision making, direction setting, and policy development. (17)

The AEA supports the twin concepts of employee involvement in decision making and the relegating of decisions to the level which is closest to those who are most likely to be affected by the decisions. However, the process to achieve those goals must be clearly defined, must protect the rights of all employees, and must ensure that it is not predicated on dissolution of employee organizations and their effectiveness.

Moreover, to be effective, decentralization must take place within a framework which is established on a district-wide basis through the collective bargaining process. (92)

33. Participation in Educational Staff Selection

The AEA believes that members, through their local associations, should have a greater voice in selection of supervisory staff.

The AEA further believes that the local associations have the right to ensure that the appropriate school employees have a decisive voice at every stage of the selection process. (17)

34. Performance-Based Compensation Plans

AEA believes that the following principles are critical to the success of any performance-based compensation system or other alternative compensation plan.

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- a. There is security in an affordable and predictable salary structure that is competitive nationwide and with other professions.
- b. The compensation system is mutually developed by educators, the local association, administrators, and school board members and supported by a super majority of the educators affected.
- c. There is continuous involvement of all stakeholders in the ongoing implementation, review and evaluation of the compensation system.
- d. The compensation system is clearly defined and understandable; has clear expectations and written definition of terms; and does not require time outside the normal work day.
- e. The plan includes a program for formative evaluation of the performance-based compensation plan.
- f. The compensation system has clear goals and is developed and implemented in transitional phases.
- g. There is equal access and opportunity at all levels of the plan for all participants.
- h. The system promotes collaboration, cooperation, and equity.
- i. The system includes multiple measures of performance and multiple pathways for attainment of salary advancement, and allows for individuals to choose among a variety of options for participation.
- j. Individual educators are involved in the design of their own performance goals.
- k. School district and site goals, teacher evaluation, student assessment, and curriculum are all aligned with the student academic standards and the professional teaching standards.
- l. Measures of student academic progress are mutually agreed upon by all stakeholders and are considered to be reliable assessments aligned with the Arizona student academic standards.
- m. The plan includes a readjustment component which provides a process by which the plan can be monitored, evaluated, and readjusted as needed.
- n. There is a standards-based professional development component, including mentoring and collegial assistance.
- o. There are sufficient and accessible resources for participants to satisfy the plan criteria satisfactorily.
- p. Incentives and rewards in the system are significant enough to encourage continuous improvement and demonstrate respect for the individual.
- q. There is a fair and objective appeal procedure.
- r. There is a process that supports the development of a school climate that enables the successful implementation of the compensation system. (01)

35. Salaries

The AEA believes that salaries of school employees should be comparable to those of other professions and occupations requiring comparable preparation, skill, value and responsibility. (06)

The AEA promotes the adoption of indexed compensation plans which offer a career salary within ten (10) years. Such plans should base advances in compensation on objective, measurable, and attainable criteria. Advancement within compensation plans should be a top funding priority. (08)

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The AEA believes that all school employees should be given full recognition for year-for-year prior service credit. (06)

The AEA advocates university salaries at least equal to the national average of comparable institutions.

The AEA believes that salary paid for summer school, continuing education programs, extended contracts, extra duty, part-time work and services of community college associate faculty members should not be less than the daily rate for regular contract pay. (07)

The AEA shall work to support policies and legislation which prohibit salary discrimination on the basis of residence, age, creed, race, ethnicity, gender, sexual orientation, gender identification, religion or marital status. AEA believes base salary should not be differentiated on the basis of grade or subject taught. (06)

The AEA is opposed to merit pay. (03)

AEA believes that all employees deserve a living wage. Furthermore, AEA believes that any mandated increases in district costs associated with raising the minimum wage be adequately funded by the state legislature. (16)

36. Benefits

The AEA believes that school districts must provide and pay for benefits including, but not limited to, the following:

- a. appropriate sick leave with unlimited accumulation;
- b. comprehensive health, life, long-term disability, dental, and vision insurance including dependent and domestic partner coverage; (08)
- c. leaves (personal, association, sabbatical, parental, leaves of absence) in which case AEA encourages local school districts to provide job security and job assignment; and
- d. employee assistance programs. (05)

37. Part-Time Employees

The AEA believes that part-time employees should not be employed for the primary purpose of reducing instructional budgets or for the purpose of reducing the number of full-time positions. Part-time employees should receive the same salary and fringe benefits as full-time employees prorated according to the workload. (17)

38. Job Sharing

The AEA supports the concept of voluntary job sharing as a means of providing a flexible employment opportunity to help meet the varying needs of school employees. The AEA believes there should be fair and equitable distribution of work between both job sharers in terms of total number of hours of work and the workload.

The AEA further asserts that job sharing conditions of work should be subject to collective bargaining and that they require the following minimum conditions for successful implementation.

- a. prorated application of the salary schedule with full recognition of years of experience;
- b. an equitable share of benefits; and
- c. the right to revert to full-time status. (87)

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39. Personnel File

The AEA supports legislation and local bargaining allowing the employee the right to review the contents of his/her personnel file, and the right to provide or withhold consent on the release of such records including the right to receive copies of materials and to purge inaccurate and no-longer relevant materials. (17)

The AEA believes that any material placed in the file shall be signed by the employee, and the employee shall have the right to submit a written commentary to any material placed in the file. (88)

40. Early Retirement

The AEA believes that every school employee has the right to participate in an early retirement incentive plan. The AEA further believes that each local should secure an early retirement incentive plan, funded by the local school district, through their collective bargaining agreements. (88)

41. Retirement

AEA believes the defined benefit plan used by the Arizona State Retirement System provides the best guarantee of a lifetime income for members. The AEA opposes any action to move members or future members to a defined contribution, cash balance plan or some hybrid of these options. (13)

The AEA maintains that the Arizona State Retirement System (ASRS) should be controlled by an autonomous board of trustees which has an ASRS member-majority on that ASRS board. Employee groups should be represented on that board. This board should have the policy and investment authority.

The AEA believes that the assets of the ASRS may be invested in economically and philosophically acceptable investments if equal consideration is given to probable income and probable safety of the capital.

The AEA encourages the ASRS board of trustees to invest in corporations having socially and ecologically responsible policies.

The AEA further believes that the ASRS board of trustees should adopt a written investment policy with measurable investment goals.

The AEA maintains that the ASRS should include:

- a. a variety of normal retirement eligibility options including a point plan based on years of experience and age; (08)
- b. a variety of options for members to choose for retirement and death benefits;
- c. a benefit formula based on 2.5% per year for all years' service which would maximize retirement income while discouraging spiking; (08)
- d. automatic cost of living increases, regardless of age, to retirees and beneficiaries; and
- e. a provision so that members may purchase or transfer up to five (5) years work experience under a non-ASRS system.

The AEA believes that all improvements in benefits should be equitable for all employees, retirees and beneficiaries.

The AEA maintains that no person participating in the ASRS should be forced to accept any reduction in benefits below those in force at any time during the period of membership. The retirement benefits are earned and, therefore, inviolate.

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The AEA is opposed to any incursions, either a misuse of assets or a failure to appropriate required funds to the ASRS.

The AEA strongly denounces any legislative action which uses any method not actuarially based in determining the contribution rate for employees and employers covered by the Arizona State Retirement System.

The AEA believes that employer contributions to the ASRS are the responsibility of the state.

The AEA advocates that upon withdrawing from the ASRS, a member should be allowed to withdraw his/her contribution plus a minimum of three percent (3%) interest.

The AEA recognizes the need to monitor the actions of the ASRS. (97)

42. Retiree Involvement

The AEA believes that retired school employees should be afforded the opportunity for input into the AEA programs and activities. (89)

43. Professional Development Resource Center

The AEA supports the creation of a system of local, district-financed professional development resource centers, designed and controlled by employees, for assistance on a continuous day-to-day basis. (14)

44. The AEA Acknowledges That During a Crisis Systemic Inequities Are Exacerbated.

It is for this reason that the AEA believes that in the event of a local, state, or national crisis, districts should do everything in their power to keep students and staff safe while examining, ensuring, and emphasizing equity for all employee and student groups. (21)

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C. TEACHING AS AN ESTEEMED PROFESSION

1. Teacher Education Programs

The AEA advocates that teacher-education programs in state institutions be given appropriate financial support to provide competent teachers needed to staff the public schools appropriately.

The AEA believes that teacher-education programs leading to certification must be based on relevant academic and competency criteria established by a professional standards board. Furthermore, the AEA believes that accreditation boards must base their activities on relevant criteria and that a majority of their members must be practicing teachers. (95)

The AEA believes that teacher education programs should offer dual enrollment and/or internship opportunities that facilitate career exploration in the education profession for all students. (16)

2. Teacher Certification (12)

The AEA believes that all teachers must have the necessary knowledge and skills to perform their duties. AEA further believes that Arizona pre- K-12 certification include an applicant's passing a valid and reliable assessment which addresses both professional knowledge and subject knowledge. AEA believes that teaching certification endorsements should be a choice that teachers make voluntarily rather than by mandate. The AEA believes that the authority for issues related to teacher certification should reside solely with the Arizona State Board of Education. (12)

The AEA believes one state system of evaluation to determine the definition of "highly qualified" should consist of a combination of college credit, recertification units, and years of successful teaching experience in the core academic areas. (03)

The AEA believes that any teacher meeting these qualifications has exceeded state licensure requirements and should automatically receive an Arizona teaching certificate. (12)

The AEA believes that professional positions, including specialized positions, be filled by education employees holding the appropriate license and/or certificate. (12)

3. Substitute Teachers

The AEA believes substitute teachers must meet the same standards as any other licensed education employee within the state. (03)

The AEA opposes the practice of assigning substitute teachers to regular positions for an extended duration of time. Positions created by extended absence should be filled by available certificated teachers who are eligible to be placed on contractual status by the school district. The AEA opposes the use of certificated teachers to substitute for personnel on extended leave, without providing full pay plus basic and fringe benefits for the substituting teacher. (95)

The AEA believes that the substitute teacher should be assigned only those duties included in the normal contract day. (01)

4. Professional Development

The AEA believes that professional development includes a wide range of pre- and in-service experiences and opportunities through which education employees can influence the teaching and learning environment.

The AEA further believes that high-quality professional development is characterized by rigorous and relevant content, strategies, and organizational supports that ensure the preparation and career-long development of teachers and others whose competence, expectations, and actions influence the teaching and learning environment.

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The AEA believes that pre- and in-service professional development require partnerships among schools and districts, higher education institutions, and other appropriate entities to promote inclusive learning communities of everyone who impacts students and their learning.

The AEA believes that professional development should provide equitable opportunities for education employees to gain and increase the knowledge and skills they feel are important to their position, to the improvement of their programs and to their performance as members of their profession. It is the responsibility of the school district to support professional development with time, funds, and resources.

The AEA further believes that local professional development and grant programs should assure that appropriate school employees have a decisive voice at every stage of planning, implementation and evaluation. The AEA encourages its affiliates to develop strategies for the implementation of funded programs governed by the appropriate education employees.

The AEA believes that professional development programs should include the following in their goals and content.

- a. foster a greater appreciation of the needs of students who come from widely diverse backgrounds and experiences;
- b. include training relevant and flexible enough to allow employees to adapt it to their needs;
- c. focus on teachers as central to student learning, yet include all other members of the school community;
- d. focus on individual, collegial, and organizational improvement;
- e. enable teachers to develop further expertise on subject content, the understanding of learning, teaching strategies, uses of technologies, and other essential elements in teaching to higher standards;
- f. make best use of new technologies;
- g. facilitate a climate of collegiality and collaborative problem solving while respecting and nurturing the intellectual and leadership capacity of all in the school community; and
- h. enable educational support professionals to receive professional development to further their career and goals. (10)

The AEA believes that high-quality professional development should (11)

- a. be evaluated ultimately on the basis of its impact on educator effectiveness and student learning; and subsequent professional development efforts will be guided by this assessment; (11)
- b. reflect best available research and practice in teaching, learning, and leadership;
- c. incorporate the best principles of adult learning; and
- d. enhance educational support professionals' job skills. (10)

The AEA supports certification by the National Board for Professional Teaching Standards as a means of professional development and encourages the inclusion of National Board certification or any of its standards as part of a professional development program.

The AEA further supports the five core propositions of the National Board for Professional Teaching Standards as a stimulus to self-reflection on the part of teachers at all levels of accomplishment and as a catalyst for the planning of professional development. The five core propositions are the following:

- a. Teachers are committed to students and their learning.
- b. Teachers know the subjects they teach and how to teach them. (11)

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- c. Teachers are responsible for managing and monitoring student learning.
- d. Teachers think systematically about their practice and learn from experience.
- e. Teachers are members of learning communities. (97)

5. Mentor Programs for Educational Employees

The AEA strongly supports the establishment of mentor programs by school districts in collaboration with the local association to train, assist and support employees. (91)

6. Teaching Experience and Educational Leadership Positions

The AEA believes that those in leadership positions in education should have had extensive experience as classroom teachers. The AEA favors a state board of education of which the majority are members of the teaching profession. (91)

7. Teacher Exchange Programs

The AEA supports teacher exchange programs as a means of providing members of the teaching profession with broadening experiences and increased understanding. (87)

The AEA believes that teacher exchange programs should provide for the safety of teachers during their appointment abroad.

The AEA believes that districts should provide continuing employment upon the teachers' return to the district. (00)

8. Roles of Teachers

The AEA believes that the primary role for all teachers is decision-making within three areas: instruction, classroom management, and counseling. (11)

The AEA further believes that non-instructional tasks should not hinder the performance of a teacher's primary role. (11)

9. Professional Autonomy

The AEA believes in the recognition of education as a profession and in professional autonomy for educators.

- a. The AEA supports the establishment of a professional standards board composed of a majority of teachers and teacher educators who regulate entry into the profession, teacher preparation programs and certification standards. (99)
- b. The AEA believes in the teacher's right to academic freedom within the parameters of established content standards. The AEA believes that the professional autonomy of an individual teacher to maintain control over the instructional strategies, methodologies and materials to be used in teaching content. (11)

10. Challenges to Instructional Materials and Teaching Techniques

The AEA believes that democratic values are best transmitted in an atmosphere of free inquiry and learning. It is essential that such a setting be free of censorship in order to ensure the academic freedom of teachers and students. The AEA believes that pre-publishing censorship, book-burning crusades, and attempts to ban books and media materials from the school library/media center and school curriculum are deplorable practices.

The AEA believes local affiliates should secure the adoption of policies and procedures that provide for the orderly consideration of instructional materials and techniques that are challenged. (96)

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11. Textbook Adoption

The AEA believes that textbook adoption must provide for individual teacher choice, including the choice of no textbook. The AEA believes its members should participate in textbook adoption processes. The AEA also encourages textbook companies to provide texts in a variety of forms and formats, including electronic resources to enhance accessibility of curriculum to students with disabilities. (17)

12. Selection of Materials and Teaching Techniques

The AEA believes that quality teaching depends on the freedom to select materials and techniques. Teachers and librarians/media specialists must have the right to select instructional/library materials without censorship or legislative interference. Challenges to the choice of instructional materials must be orderly and objective, under procedures mutually adopted by professional associations and school boards.

The AEA believes that instructional materials and equipment must be of a sufficient variety and quantity to serve all students. (15)

13. Performance Evaluation

The AEA believes that our students and teachers deserve high quality evaluation systems that deserve high quality evaluation systems that provide the tools teachers need to continuously tailor instruction, enhance practice, and advance student learning.

Such systems must provide both ongoing, non-evaluative, formative feedback and regular, comprehensive, meaningful, and fair evaluations.

Such systems be developed and implemented with teachers and their representatives, either through collective bargaining where available, or in partnership with the affiliate representing teachers at the state and local level.

- a. All teachers should be regularly evaluated by highly trained evaluators on the basis of clear standards as to what teachers should know and be able to do.
- b. Evaluations must be comprehensive – based on multiple indicators to provide teachers with clear and actionable feedback to enhance their practice – and must include all three of the following components:
 - Indicators of teacher practice
 - Indicators of teacher contribution and growth
 - Indicators of contribution to student learning and growth
- c. Evaluations must be meaningful, providing all teachers with clear and actionable feedback linked to tailored professional development.
- d. Evaluations must be fair, conducted by highly trained and objective supervisors or other evaluators as agreed to by the local affiliate, whose work is regularly reviewed to ensure the validity and reliability of evaluation results.
- e. Evaluation systems must be adequately funded and staffed, and fully developed and validated, including by training all teachers on the new systems, before they are used to make any high stakes employment decisions. (12)
- f. All formal evaluation processes must include a meaningful appeals process where teachers can appeal scores and ratings. Any use of student data must be transparent and verifiable. (16)

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14. Peer Assistance and Review

The AEA believes that high standards are cornerstones of the profession, and under certain circumstances, a peer assistance or a peer assistance and review program is an appropriate mechanism for achieving these objectives.

The primary purpose of any such program should be to provide assistance to improve professional practice, retain promising teachers, and build professional knowledge to improve student success. A local association may also decide to include a review component in the program involving the evaluation of performance. If a local association takes either position, the program should: (17)

- a. be developed through collective bargaining or through a joint association/school district agreement in non-bargaining states;
- b. be governed by a board composed of an equal number or a majority of representatives appointed by the local association;
- c. acknowledge that the school district makes the final decision to retain or seek nonrenewal or termination, but that recommendations forwarded by the joint governing body are routinely accepted and acted upon by the district;
- d. ensure that only teachers who are deemed by their peers to be highly skilled practitioners are selected for the role of consulting teacher, that the consulting teacher's area of expertise is the same as or closely related to that of the participating teacher, and that the consulting teacher is chosen by the program governing bodies;
- e. seek consulting teachers who reflect the diverse population of the teaching staff;
- f. provide that consulting teachers are within the teaching profession and continuous improvement in professional practice properly compensated and provided appropriate time to fulfill their responsibilities;
- g. provide that consulting teachers receive extensive and ongoing training in mentoring/coaching skills, district initiatives and resources, and current education instructional methods;
- h. establish guidelines for the referral of teachers as well as safeguards to prevent unwarranted referrals and to allow participating teachers the selection and/or approval of their assignment to a consulting teacher;
- i. establish and convey to all consulting and participating teachers clear rules on allowable uses of documents, products, and communications arising from the program;
- j. require extensive documentation based on ongoing assessments of each participant;
- k. require that rigorous and extensive assistance be provided over an appropriate period of time to help the participating teacher attain the requisite standard of proficiency before any effort is made to counsel the participating teacher into alternative career choices either within or outside the education profession or a recommendation to initiate nonrenewal or termination proceedings is issued;
- l. ensure due process protection and duty of fair representation procedures; and
- m. guarantee that participating teachers, consulting teachers, and teachers who sit on governing bodies do not lose their Association membership or bargaining unit status by virtue of their participation in the program. (99)

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D. EDUCATION SUPPORT PROFESSIONALS AS VALUED PARTNERS

1. Roles of Education Support Professionals

The AEA believes that the primary role for education support professionals falls within three areas: (11)

a. *Student Achievement*

The education support professional is a partner in all areas of the learning process ensuring all students achieve to their highest ability level.

b. *Safety*

The education support professional provides a safe environment for the education community.

c. *Well Being*

The education support professional provides health, nutrition, sanitation, and wellness services throughout the education community. (14)

2. Accountability for Student Achievement

AEA believes that education support professionals contribute to a positive education environment and support student achievement and success. (17)

3. Certification and Licensure

The AEA believes that all education support professionals must have the necessary knowledge and skills to perform their duties.

The AEA believes that professional positions, including specialized positions, be filled by education support professionals holding the appropriate license and/or certificate. (14)

4. Professional Development

The AEA believes that professional development includes:

a. A wide range of pre- and in-service experiences and opportunities through which all education employees can influence the education community.

b. The AEA believes that any professional development requires partnerships among schools and districts, higher education institutions, and other appropriate entities to promote inclusive learning communities of everyone who impacts students and their learning.

c. The AEA believes that professional development should provide equitable opportunities for education support professionals to gain and increase the knowledge and skills they feel are important to their position, to the improvement of their programs and to their performance as members of their profession. It is the responsibility of the school district to support professional development with time, funds, and resources.

d. The AEA further believes that local professional development and grant programs should assure that all appropriate school employees have a decisive voice at every stage of planning, implementation and evaluation. The AEA encourages its affiliates to develop strategies for the implementation of funded programs governed by the appropriate education employees.

e. The AEA believes that professional development programs should include the following in their goals and content:

i. Foster a greater appreciation of the needs of students who come from widely diverse backgrounds and experiences;

ii. Include training relevant and flexible enough to allow education support professionals to adapt it to their needs;

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- iii. Include all members of the school community;
 - iv. Focus on individual, collegial, and organizational improvement;
 - v. Enable education support professionals to develop further expertise on subject content, the understanding of learning, teaching strategies, uses of technologies, and other essential elements in teaching to higher standards;
 - vi. Make best use of new technologies;
 - vii. Facilitate a climate of collegiality and collaborative problem solving while respecting and nurturing the intellectual and leadership capacity of all in the school community; and
 - viii. Enable education support professionals to receive professional development to further their career and goals. (14)
- f. The AEA believes that high-quality professional development should:
- i. Reflect the best available research and practice in the appropriate field;
 - ii. Incorporate the best principles of adult learning; and
 - iii. Enhance educational support professionals' job skills. (14)
5. Mentor Programs for Education Support Professionals
The AEA strongly supports the establishment of mentor programs by school districts in collaboration with the local association to train, assist and support education support professionals. (14)
6. Performance Evaluation (13)
The AEA believes that our education support professionals deserve a high-quality evaluation system. Such systems must provide both ongoing, non-evaluative, formative feedback and regular comprehensive, meaningful, and fair evaluations.
Such systems should be developed and implemented collaboratively, either through collective bargaining where available, or in partnership with the affiliate representing education support professionals at the state and local level.
- a. All education support professionals should be regularly evaluated by highly trained evaluators on the basis of clear standards as to what the education support professional should know and be able to do.
 - b. Evaluations must be comprehensive and based on multiple indicators to provide clear and actionable feedback to enhance job performance.
 - c. Evaluations must be meaningful, providing clear and actionable feedback linked to tailored professional development.
 - d. Evaluations must be fair, conducted by highly trained and objective supervisors or other evaluators as agreed to by the local affiliate, whose work is regularly reviewed to ensure the validity and reliability of evaluation results.
 - e. Evaluation systems must be adequately funded and staffed, and fully developed and validated, including the training of all education support professionals on the new systems, before they are used to make any high stakes employment decisions. (14)
 - f. Student test data should not be used negatively as part of any ESP evaluation. (16)
7. Experience and Leadership Positions (14)
The AEA believes those in leadership positions should have extensive job experience relating to their field. (14)

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E. LEARNING AS A COMMUNITY COMMITMENT

1. Superintendent of Public Instruction
The AEA believes that the Superintendent of Public Instruction should hold a valid teaching certificate. (11)
2. Public Involvement
The AEA advocates examination and revision, when necessary, of school election laws to ensure that the general public through the legislature, State Board of Education and local school boards, determines the goals of education. (92)
3. Increased Effectiveness
The AEA believes that continuous communications and inter-involvement of the local, state and national bodies are keys to the success of the locals in building solid professional organizations. The AEA believes that increasing support is needed to effect ultimately the desired membership growth within the AEA. The AEA believes its locals should initiate programs which will strengthen and enhance their organizational effectiveness. (88)
4. Agency Contacts
The AEA believes every member should work diligently to develop and to enlarge contacts with local, state and national officials and agencies, be they political or legislative, elective or appointive. (94)
5. State Trust Lands
The AEA believes that the land granted to Arizona at statehood is a value asset for the funding benefit of public education, not public lands for the general use. To achieve that benefit, the land assets must be sold or leased through the management of the Arizona State Land Department to the highest bidder for appropriate market value. The AEA encourages the conservation and preservation interests to participate in the bidding process.

The proceeds of sales must be placed in the permanent land trust to generate earnings for annual distribution to public education. The proceeds from leases must be distributed directly to public education annually.

The AEA believes that the trust earnings and the lease proceeds are to provide supplemental funding to public education that is in addition to, not in place of, the state's obligation to provide appropriate funding for schools.

The AEA believes that the education beneficiaries of the trust should hold majority representation on an oversight board or commission that is authorized to provide general direction to the State Land Department.

The AEA supports the funding of appropriate resources to assist the State Land Department to efficiently manage the State Trust Lands to achieve maximum benefit for the public education beneficiaries through growth in the permanent trust fund and lease proceeds. (02)
6. Federal Government Properties
The AEA believes that the federal government should furnish support for education in the form of funds paid on the basis of real property held by the federal government within the states, such payments to be in lieu of real property tax which might be levied were the property privately owned. (88)

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7. Federal and State Funding Shares

The AEA, in accord with the National Education Association, believes that the federal share of the cost of public education should be at least one-third. Educational funding should be budgeted separately in recognition of its high priority in the federal budget. (02)

8. Funding for Mandated Programs

The AEA believes that all local, state, and federally mandated programs must be fully funded to include: (05)

- a. sufficient training, during the contract day, of staff involved in the classroom level of implementation,
- b. accessible support, and
- c. sufficient resources to implement the program successfully. (02)

9. Diversion of Public Education Funds

The AEA is strongly opposed to the diversion of public education and other social program funds.

10. Privatization of Public Schools

The AEA opposes the privatization of public schools and public school employees, and the use of public funds to financial programs or schools for profit. The AEA calls upon state and locally elected officials to take appropriate measures to keep public schools in the public domain and subject to all laws relative to the functioning of school committees and boards in their respective communities. (08)

AEA believes that any retired school employee wishing to return to the profession only do so as a district employee. (09)

11. Voucher Plans

The AEA believes that voucher plans, tuition tax credits or funding formulas that have the same effect as vouchers--under which education is financed by federal, state or local grants to parents, schools or school systems--could lead to racial, economic and social isolation of students and weaken or destroy the public school system.

The AEA believes that legislation designed to establish or implement pre-kindergarten through grade 12 voucher plans is detrimental to the public interest and calls upon its affiliates to work for the defeat of such legislation. (00)

The AEA is vigorously opposed to governmental support of non-public education through such measures as tuition tax credits and voucher systems. The AEA believes its affiliates should take action as necessary to protect and promote public education. (17)

The AEA further believes an individual must be free to substitute or supplement, at his/her own expense, education in privately supported, non-public schools that meet Arizona Department of Education standards. (95)

12. Education Finance

The AEA supports Average Daily Membership as the basis on which funds are provided to school districts. The AEA is committed to raising the per-pupil funding for common school districts to the level of funding of high school districts.

The AEA supports legislation providing for an appropriate program of statewide bonding for university facilities.

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The AEA believes that financial support and the necessary programs shall be provided to meet the needs of students affected by the Compulsory Attendance Law requiring the attainment of age 18 or high school graduation. (88)

13. School Budget Limits

The AEA believes that it is in the best interest of our society that school budgets include a factor for keeping up with inflation and be free of legislative limits in order to meet the needs of our youth. The AEA believes that local governing boards should be fiscally independent and restrictive limits should not be imposed on their budgets. (94)

14. Tax Reform

The Arizona Education Association believes that there is an undeniable link between a quality public education for every child and sustainable economic development.

The AEA believes that tax reform must be completed promptly and rationally. Tax reform should:

- a. increase tax fairness and raise revenue necessary to finance quality public education;
- b. prevent excessive reliance on property or any other single tax;
- c. assure that statewide uniformity in property tax be required;
- d. provide for increased local and state funding of public education. (93)

15. Education Tax Deductions

The AEA believes tax codes should allow for deduction of those expenses encountered by school employees which are necessary to effectively perform their duties. (00)

16. Governmental and Public Support for Public Education

The AEA believes that education should be provided from early childhood through adulthood. Public education should be integrated, should meet the needs of the individual and society, should be offered at public expense and should be required through the secondary school.

The AEA believes that appropriate governmental support of education at every level is of primary importance. The AEA will use lobbying, political action and public relations to advocate for such support. The AEA urges that each member be actively engaged in support of legislation which will improve the quality of and the public image of education and school employees. (13)

17. Support for Public Schools

The AEA believes public education is indispensable to national unity and equality of opportunity; promotes an educated workforce; and the maintenance of the enlightened citizenry necessary in our democratic society. The AEA calls for renewed support and recognition of the central role of the public schools in preserving, perfecting and providing leadership for our free society. (12)

18. Collaboration and Networking

The AEA believes in building collaborative relationships and networking with external organizations.

The AEA, as part of its networking and collaborative efforts, shall promote and address ethnic minority/diversity concerns.

The AEA Board of Directors and other concerned committees shall support cooperative inter-agency and inter-group efforts insofar as financially possible and shall encourage participation of the AEA membership at all levels. (91)

2022-2021 AEA RESOLUTIONS

19. Public Relations

The AEA is committed to an effective public relations program which provides communications to the general public focusing on the passage of state and federal collective bargaining bills and mobilizing public support for public education.

20. Public Education Coalitions

The AEA shall support and encourage the extension of education coalitions. These coalitions should maintain support for the state and federal departments of education. They should continue strong opposition to voucher systems and tuition tax credits. The coalitions should support full funding for all state and federally mandated programs and promote lobbying for appropriate state funding of public education. Members of the coalitions should include students, parents, school employees, school board members, administrators and patrons. (14)

21. Parental/Guardian Involvement

The AEA believes parents must be involved in their children's education and supports programs which facilitate their involvement such as

- a. programs conducted in an environment conducive for parental/guardian involvement, i.e. flexible timing, appropriate notification in appropriate languages, bilingual facilitators, etc.
- b. availability of English Language Learners (ELL) programs in adult education
- c. statutory provision for leave from work each year for parents/guardians to participate in school activities related to their children's education
- d. sponsorship by the AEA and local affiliates of recognition activities spotlighting parents and community members who support education. (17)

22. Site Councils

The AEA supports the institution of site councils as a means of establishing a site-based decision-making process. To achieve the goal of shared decision making, the AEA recommends that each site council, at minimum, includes representatives of certified and educational support professional employees who work at the site and parents of pupils who attend school at the site. The AEA also recommends that the membership of each site council accurately reflects each school's community. (11)

Furthermore, the AEA believes that each site council should develop clearly-defined guidelines for decision making. The AEA supports the empowerment of site councils to make decisions, within federal law, state statute, and local district policies including the parameters of local collective bargaining agreements, which impact their respective school sites. The AEA also believes that site council decisions must be enforced by the principal as policy for the school site. (09)

23. Private and Home Schooling

The AEA believes that all children must receive an education. The AEA also believes that while education should be compulsory, parents have the right to choose among public, private or home schooling for their children. (02)

The AEA believes that all private school teachers and home schooling teachers should have at least a B.A. (or equivalent) from an accredited college or have passed the Arizona Educator Proficiency Assessment. Every home engaged in home schooling must have an authorized instructor who stays in the home during their time scheduled for instruction. (17)

The AEA believes that every school-aged child in the state should take regular statewide mandated tests, so an objective record of learning can be maintained and monitored by the County Superintendent's office in each county.

2022-2021 AEA RESOLUTIONS

The AEA believes that students who fail to meet standards in the statewide mandated tests shall be required to enroll in a state accredited institution or to submit an educational improvement plan to the county school superintendent. The county superintendent of schools shall be required to maintain accurate records of home-schooled and private school students and communicate the information and test scores to the district of attendance. (07)

The AEA believes that every school-aged child should meet periodically with a licensed health care professional so that health and physical development can be monitored. (00)

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Audit Committee

Members: Angela Philpot (chair), Patrick Castro, Audrey Cunneely, Carmen Peters, Amanda Shepard, Amber Gould, Marisol Garcia. **Staff Liaison:** Margaret Sleeper

Charges

1. Carry out the responsibilities assigned to the Audit Committee as defined in the AEA Board of Directors' Policies and Procedures Audit Committee Policy, Section II. B.4 page 43.
 - a. Duties and Responsibilities In the fulfillment of its obligation to monitor, question, inform, improve and advise, and as those responsible for the fairness, thoroughness and accuracy of financial information, the Audit Committee will:
 - b. Report to the Finance and Revenue Committee at least annually;
 - c. Review and understand financial statements;
 - d. Be responsible for the recommendation to the appropriate body of the appointment, compensation and presentation of the work of any public accounting firm performing audit services;
 - e. Review any audit problems or difficulties, and recommend to the appropriate body resolution of disagreements between the independent auditor and management;
 - f. Review the Management Letter provided by the independent auditor;
 - g. Establish procedures for the receipt, retention and treatment of complaints received regarding internal controls and auditing;
 - h. Request to engage independent counsel, independent financial experts or other advisors, as determined necessary to carry out its duties;
 - i. Participate in training necessary to fulfill these duties; and,
 - j. Meets with the auditors at least annually.

Report

The Audit Committee met with our external auditor, Henry & Horne, after completion of the annual audit. The Committee was given a basic financial overview of the auditing process. The overview included discussions regarding areas of focus for the current year and testing of internal controls. The Committee reviewed the audited financial statement and associated footnotes as well as the Management Letter which details any problems incurred in the audit process or recommendations as how to improve the weakness or deficiency in internal controls. No problems or internal control weaknesses were found.

Recommendations

The Audit Committee made a recommendation to the AEA Board of Directors for the accounting firm of Henry & Horne to conduct the next audit of our organization.

Compliance Review Committee

Committee Members: Steve Adams (Chair), Lorelei Andersen, Estevan Carreon, Julie Cozad, Jennifer Dwosh, Carlos Robinson (Co-Chair), William Rhodes, Petra Schmid-Riggins **Staff Liaison:** Nicole Adams

Charges

1. Carry out the responsibilities assigned to the Compliance Review Committee as outlined in Article II, Section 8 of the AEA Bylaws.
2. Monitor and recommend adjustments to AEA Election Districts for the election of AEA state and regional delegates to the NEA Representative Assembly to ensure compliance with NEA's governance documents.

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Report

The Compliance Review Committee met several times to monitor membership representation figures for both the NEA Representative Assembly election districts and the AEA Board of Directors Governance Regions. Based upon the January 15, 2021 membership figures, the AEA now has 16,728 active members. The average number of members per regional director is 984. The AEA has 13 regions with 17 regional directors. There are 25 members on the AEA Board of Directors, which include 3 state officers, 1 NEA State Director, 1 Retired Director, and 3 Education Support Professional At-large Directors.

The NEA requires that all voting members of the AEA Board of Directors comply with the principle of one person-one vote. The AEA Board of Directors uses a weighted vote which complies with the principle of one person-one vote. Each Regional Director has a vote equal to the percentage of deviation from the average number of members for that region. Directors elected at-large have a weighted vote of 100.

Recommendations

The Compliance Review Committee recommends no change to AEA governance regions or local association assignments within the AEA Board of Directors governance regions.

Elections Committee

Committee Members: Shaun Creighton (Co-Chair), Kelly Trujillo (Co-Chair), Anita Bowland, Betsy Brian, Jeanne Erickson, Cathy Gomez, Kinora Hernandez, Joan McCoy, Lizzie Menefee, Marshall Militano, and Judy Moy Staff Liaison: Nicole Adams

Charges

1. Carry out the responsibilities assigned to the Elections Committee as defined in the AEA Election Policy and AEA Delegate Assembly Standing Rules.
2. Create and submit policy recommendations for AEA elections to ensure consistency, transparency and trust; including but not limited to rules and procedures related to campaigning during AEA virtual events and the potential impacts of the use of social media.

Report

The Elections Committee met in October, February, and April to carry out the committee charges. In October, the committee edited the NEA-RA nomination form and the AEA Board of Director nomination form to reflect 2022 dates and open positions, as well as set the 2021-2022 association election timeline. Committee members were reminded that they must remain neutral in all governance elections and discussed examples of actions that help maintain neutrality.

At the October meeting, initial discussions were also held related to the Committee's second charge (specifically related to policy recommendations for AEA elections). In January, the Committee worked collaboratively online to flesh out recommendations based on those initial discussions, and in February, the Committee met virtually to finalize and vote on the recommendations, which were sent on to President Thomas for further action.

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The Elections Committee met later in February to certify the NEA-RA Statewide, Regional and Retired nominations and conduct a lottery for candidate placement on the ballot. At a separate February meeting, Co-Chairs Creighton and Trujillo worked with Staff Liaison Adams to produce a video training presentation for local election chairs.

The Elections Committee will meet in April to certify the 2022 NEA-RA elections, certify the elected delegates to the 2022 Delegate Assembly, and begin planning for the election to be held at the 2022 Delegate Assembly.

The Committee has and will continue to carry out its responsibilities as assigned in the AEA Constitution, AEA Bylaws, AEA Board Policy, and the Standing Rules of the Delegate Assembly.

Recommendations

Amend AEA Standing Rules and AEA Board Policy to better clarify campaign guidelines as they relate to virtual assemblies.

Clarify AEA election procedures/guidelines that may impact decisions at the local level (e.g., the March 1 deadline to declare candidacy for an AEA office position may influence locals' candidate recommendation process).

Clarify acceptable methods of submitting AEA nomination forms (e.g., fillable PDF or Word documents, sending required information in an email, paper forms sent via mail, etc.).

Educators of Color Leadership Task Force

Task Force Members: Anthony Lovio (co-chair), Christy Sainz (co-chair), Neadra White, Teresa Arvizu, Juliana Horwin, Tina Quinonez, Carlos Morillon Varela. **Staff Liaison:** Liz Leivas

Charges

1. Review and modify the current 3-year plan to implement the Educators of Color Engagement Plan's priority strategies to meet NEA Bylaw 3.1(g) and achieve true equity in AEA elected leaders and diversity in local leadership.
2. Use existing data to assess the current implementation of outreach to association educators of color, as stated in the Arizona Education Association plan for minority engagement. Present a report to the AEA Board of Directors of successes, gaps in attainment of, and potential actionable items mid-plan as a means to reach goals by 2022.
3. Create a list of strategies and tactics a local association can use to ensure that educators of color are empowered to take on leadership roles within their union.
4. Create strategies to create a database of stories from educators of color of reasons they have chosen to join the profession.

Report

The Educators of Color Task Force met, reviewed and discussed how current and newly proposed programs promote ethnic minority engagement throughout the Arizona Education Association. Examples of those programs are as follows; Latino Outreach Cadre, Leaders Academy, Summer Institute, National Minority Leadership Conference, Delegate Assembly, Representative Assembly. The task force also recognizes that there

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are funds to assist members of color and can be provided by the state, local or Ethnic Minority Caucus. To better understand why members of colors signed up for their local association the task force used Hustle, a mass texting app to contact all AEA members who identify as a minority. Of the 9,102 identified members of color 6,555 had numbers that were textable and 95 responded with their story.

Recommendations

Continue to promote all Leadership opportunities through the AEA Insider and AEA Advocate inviting members of color to become part of their Local Leadership structures by becoming a site representative or joining their executive board. Strategies suggested are sending email invitations, publications highlighting members of color, and having 1 on 1 conversations.

Below are the stories we felt are powerful. Please use these stories in the Advocate to highlight members of Color or when a quote is needed to increase the visibility of members of color.

-Unions fight for those who cannot. Provide the support and protection needed from large agencies, negative personnel, rules, and conditions that are dangerous to the workers. Fight for the pays that due, for the levels of work being done. They fight for our right to have time for our families ourselves health and well being . -Dawn Cerven

-Arizona's ranking in Education is at the bottom of the country. It is my hope that in the Union I find a place of support, collaboration, and collective work in order to protect teachers and what we know works for students. -Patricia De la Rosa-Acosta

-I wanted a group that would help protect me in my job, especially in terms of working conditions. My last job did not have a union and I was overworked, far underpaid, and constantly worried I would be fired for being part of the LGBTQ+ community. -Kalista Creighton Ahouse

-Based on a co-workers recommendation, and my fear of unfair practices, I thought I would definitely need help and someone on my side at some point, I have sought the advice of the union representative already and they have helped me with advice. Sometimes you don't know when you will need the advice but when you do, you are 1000% glad you had the option to lean on that knowledge. -Olga Smirnoff

-My father was a big union man even though he did not belong to one and because of that, he encouraged us to always join our unions. He said unions make sure are rights are protected in the workplace and not taken advantage of by power-hungry bosses and supervisors. -Flor Lopez

-Because I want to know my voice is heard when it comes to my students -Savannah Cantu

-I believe there is strength in numbers. I believe all children deserve to have a quality public education. These are the reasons I decided to join AEA because I believe when we work together we can provide all students with the quality education they deserve. - Jessica Hanson

-The simplest answer I can give boils down to two main points: the first is that my family has always been active in the union, and the second is that I strongly believe in AEA's

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core foundation. Throughout my life, my dad (along with other family members) was an active AEA member, so I got a first-hand look at the union from an early age. I even remember attending several NEA conferences as a guest. Over the years, I grew to support and advocate for public education and workers' rights, even taking part in the RedforEd protests a few years back. So for me, it was a no-brainer to join the union as soon as I became eligible, and I hope to continue working with AEA when I finally become a teacher myself. -Jane Carreon

-My father was a union leader as a career firefighter and captain. I read Firefighter Quarterly enough to know there was power in numbers. They have a collective voice at the state and national level influencing legislation that in turn impacts their careers. I knew unions were a good thing for that and so much more. As a new teacher, it was apparent the Glendale Union EA had power and influence. I wanted to be a part of that. -Rudy Aguilar

-Both my wife and our Dad's were Copper Miners and worked many years for Phelps Dodge in the Copper mines of AZ. We saw how the Union took care of our families during difficult times such as the Strike years. Both my wife & I have been in Education for a combined 78 years and understand the importance of belonging to a Union to help us, our families, schools & students to represent us as needed! A strong Union is vital for Public Education! -Francisco Denogean

-Historically education has been inequitable for all students. While educating students, we have come a long way, we still operate in a system that does not provide a level playing field for students and teachers. Without proper funding in education students, staff, and families suffer. All students cannot access educational opportunities in the same way. Students of various races, ethnicities, religion, identities, financial status, and/or abilities do not have access to resources as the general population. Without proper funding and specialized programs, students ultimately suffer, thus increasing educator burnout. Educational burnout means the face of education is changing whether we want it to or not. Burdened, understaffed, and underpaid educators will ultimately leave the jobs they love. I cannot advocate properly for students as a singular voice and expect systemic change. However, as a collective unit, we have a better chance at providing education a fighting chance. -Dahana Zamora

-Estoy en el Sindicato por qué han sido muchos años de abuso solo por el hecho de ser de otra raza. El sindicato nos protege por igual. También porque ellos son más sensibles a los vulnerables, que muchas veces son las personas de otras culturas. Thanks for translating my experience -Kenya Marquez

-As an educator, it is important for me to be part of an organization of professional teachers in education for credible information and education updates, security, and sense of protection for abuse and unreasonable dismissal. It is also important for me to be a member of an association such this for consultation and reliable advice since I am a foreign teacher teaching in the US. I am thankful to be part of AEA and MEA. Thank you. -Jude Basiga

-I believe being part of the union is the best way to get our voices heard by our legislators, as well as the best way to protect ourselves from being taken advantage of and taken for granted. -Meredith Roach

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-I joined the union because I wanted my voice to be heard, and I wanted to have some leadership opportunities to grow the profession. Having the union get my back on work conditions, and the security of having insurance is very comforting as well. -Jessie McKinley

-I chose to join my union because I felt lost in the district as a teacher. I didn't know where to go for information, who to talk to about any issues, concerns, questions, and ideas that affected myself and other teachers. I was also drawn to learn how our union leaders advocate in a way that makes a difference. It is not easy to advocate or even know when to advocate as a new teacher, or even a seasoned teacher, unless given the opportunity to learn to. This is what my union did for me and continues to do for me. Advocacy, bargaining, and leadership training has built my, knowledge, confidence, utility of resources, and focus enough to contribute to conversations that matter and make change and growth happen for our teachers, rather than just living through the changes that roll our way, with no real input. My union coached and guided me to how to gain a seat at the decision making tables. My union has made my career, less of an, "I just work here," position to an, "let's make things better," position, to where I now feel like I am part of the process district-wide, state-wide, and nationally in my teacher role. - Sara Mendoza

Government Relations & Legislative Action Task Force

Task Force Members: Michael McGowan (co-chair), Katie Nash (co-chair), Rachael Eggebeen, Storm Gerlock, Cassandra Lockard, Luci Messing, Nathaniel Ratey, Mario Ruiz, Carrie Wolfe. **Staff Liaison:** Ellie Perez Pawlowski and Brenden Foland

Charges

1. Review and make recommendations to the AEA Board of Directors regarding the content and prioritization of the AEA Legislative Agenda.
2. Collect member input on legislative priorities and utilize that information in developing the AEA Legislative Agenda.
3. Review recommendations for changes in the AEA Legislative Platform. Present recommended amendments to the AEA Board of Directors and then to the Delegate Assembly for approval.

Report

The task force developed a legislative survey based off of hot topics facing educators which was sent to all members. Survey results were utilized to shape the Legislative Agenda and make revisions to the agenda. The board approved the changes to the Legislative Agenda. Additionally the task force held two listening tour sessions to gather feedback for the Legislative Platform. The task force also sent out a Google form with questions regarding topics on the Legislative Platform for feedback from members who could not attend the listening sessions. Results were then used to propose amendments to the Legislative Platform. During Research and Policy day, the task force worked on the structure of the listening tour sessions and questions for the listening tour.

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Recommendations

Due to staff changes, COVID and the emergency of needing to override the AEL, we were unable to effectively implement the recommendations from last regarding the NBI-2019-05. Therefore, this year, the Government Relations and Legislative Action Task Force recommends that AEA host an educational seminar related to the NBI with examples of ALEC, Chamber of Commerce, and other related group bills being proposed at the Capitol. The task force also recommends that AEA put together informational materials about different threat groups with resources that can be accessed by members. As part of these informational materials, the task force also recommends AEA work with other partners to build a coalition against these attack groups, build awareness on good businesses not affiliated with ALEC, and list of businesses and services not supported by ALEC or the Chamber of Commerce that members can reference and support.

Racial and Social Justice in Education Task Force

Task Force Members: Vanessa Jimenez (Co-Chair), Margaret Chaney (Co-Chair), Janice Dwosh, Sarah Mendoza, Linda Somo, Christina Bustos, Sunny Jundt.

Staff Liaison: Art Mendoza

Charges

1. Identify and outline the professional development opportunities to support the work of combating institutional racism in our education system for local and statewide use.
2. Create initial interests & outcomes of the yearly convening to support and engage members around issues confronting BIPOC and LGBTQIA+ Students.
3. Review AEA guiding documents to ensure the appropriate use of language is adopted and racial & social justice in schools is acknowledged.

Report

Charge 1: Identify and outline the professional development opportunities to support the work of combating institutional racism in our education system for local and statewide use.

In order to understand Institutional Racism, we must first agree on the definition: we would suggest the following for PD use:

The ways in which the structures, systems, policies and procedures of institutions in the US are founded upon and then promote, reproduce and perpetuate advantages for white people and the oppression of Black, indigenous and People of Color (BIPOC).

The ways in which institutions legislate and structure reality to advantage white people and oppress BIPOC. The ways in which institutions –Housing, Government, Education, Media, Business, HealthCare, Criminal Justice, Employment, Labor, Politics, Church – perpetuate racism.¹

While educators currently must take a course in the history of American Public Schools and many may cite the history of segregation within public education, there is a deficit in discussions regarding the early history of our own government's refusal to bring Black and Brown students into the school system itself. As far back as 1647, Public Schools were created not for the purpose of equality but rather to ensure that white Puritan children would be able to read their Bibles. By 1779, Thomas Jefferson suggested a two-tiered education system to separate the "learned" from the "laborers". It should be noted that in this two-tiered system, it was already assumed that only one group would be able to participate in civic duties. As the nation grew, more territories and states included laws refusing education to Native, African & Mexican, and Asian Pacific Islander Americans while guaranteeing that White children would receive some level of education to further elevate and separate them from the "others". The intention of

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creating an unfair advantage becomes further evident by the 1830's when states begin to create laws forbidding the children of slaves from receiving any education at all. *₂

The United States declares its ability to maintain a democracy so long as it is allowed to simultaneously practice capitalism. Early capitalism required a large labor force in order to bring about the enormous profits and the promise of a better life for each generation of owners within the system, owners of the factories or owners of slaves. The need for a larger, cheaper labor force and the competition if created, led to several insurrections and finally a civil war against unbearable, inhumane conditions. One lesson learned after the Civil War was that the more BIPOC people understood about their own oppression, the more they demanded to be treated better, which in turn led to outlawing the very act of learning anything that might help bring about more freedom and demands for equal treatment under the law.

Unionization empowers the worker while creating a docile workforce through public education furthered stereotypes and biases within segregated schools. Perhaps even worse was the elimination of culture and traditions within those cultures in an attempt to "Americanize" and minoritize BIPOC heredity. Spanish speakers were forbidden to speak their own language in school, Native Americans are kidnapped from their homes and forced into obedience through Indian Boarding Schools while official "Killing the Indian to save the man". As all these laws and policies took shape, they further separated any promise for equality. Segregation lawsuits recognized the intentionality of these policies and yet they persisted for years with one of the longest suits in history occurring here in Tucson. Public schools with predominantly black or brown students are routinely negatively portrayed in the media and in the halls of government to reduce or even refuse funding. Less funding has created a deficit in public school preparation for standardized testing – testing that has become less and less relevant to black and brown students and educators over the decades.

A further consequence of institutionalizing racist policies was the clear imbalance in how discipline, curriculums and expectations were handled based on the color of a student's skin. Study after study has shown discipline issues on campuses have led to more Black & Brown suspensions & expulsions. Fear of school shootings, gangs and drugs have led to the perceived need for law enforcement on campus. As fears have grown, teachers have gone so far as to contact law enforcement for elementary student discipline issues. The reason for the reaction is clear when reviewing the data regarding the number of arrests for students of color and their grade level. What does having a police presence on campus do to the daily social- emotional wellbeing of Black students? Safety does not automatically equal success particularly when the "saviors" perceive the students as the aggressors. Law enforcement does not receive the same training to work with students that social workers, counselors or teachers receive. In addition, there is also a change in the perceived role of law enforcement on campuses. The further militarization of police forces have led to more severe reactions to students and enabled the school to prison pipeline to grow and evolve every year. The rules for prisoner expectations and the expectations of student behavior in the nation's "worst" public schools become oddly reminiscent of the need for a docile workforce.

Even more apparent, is the intentionality behind voter suppression laws being passed by the same legislators who deny funding to public schools. There are police officers on campus because there are not enough other alternatives yet there is a real need to explore some of those options.

Recommendations

We should continue to research as a whole; various resources to help others understand the impact of institutionalized racism and its inequities. Professional Development on implementing alternative discipline programs, the impact of including SRO's on predominantly BIPOC school campuses and understanding community building is paramount to reversing the role or implied role of law enforcement and bad decision making by students on campuses. Police should not be seen solely as a threat and part of discipline. If campuses are to become safe havens, every adult on the campus should be seen as a person who will keep a child or young adult safe. Advocating for Teen Courts, mentor programs, trauma workshops & general restorative practice and the funding to implement these programs throughout a district could have tremendous impact on the lives of both students and educators.

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Continued failure to implement alternative programs within an ENTIRE district, places the burden on the classroom teacher rather than the system itself.

Educators should be able to work with students on current racial issues without fear of having teacher's academic freedoms taken away or disciplined by admin/parental threats. Recognizing that parents see the world through their own framework, outside issues may be seen as a threat to their norms. There are two fronts that a Professional Development workshop could attack: the intersectionality between the history of discrimination of BIPOC & LGBTQIA+ populations and the anti-union fervor and violence that has ripped across this country. Professional Development opportunities that review this history along with how to recognize their own deficit mindset of student test scores may allow teachers the ammunition they need to design better standardized tests with a growth mindset.

Articles on academic freedom should be part of every local agreement throughout the state of Arizona. Locals could begin to work with School Boards and the Arizona Libraries Association on the use of Book Boards to analyze or examine complaints from the communities to combat the complete banning of books. AEA could further encourage locals to utilize NEA Honesty in Education training with resources. Finally, a statewide policy could come in the form of an NBI or Resolution at the Delegate Assembly in May, 2022.

² <https://www.raceforward.org/research/reports/historical-timeline-public-education-us>

¹ NEA Leadership Summit –Talking Race Breakout session 2021

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

³ <https://ocrdata.ed.gov/dataanalysis/tools/detailgraphsanddatareport>

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

Charge 2: Create initial interests & outcomes of the yearly convening to support and engage members around issues confronting BIPOC and LGBTQIA+ Students

REPORT:

Not acknowledging a student's identity can lead to depression, and further trauma, - the child no longer is thriving because they are busy fighting the system that denies their acceptance. We have seen the impact of this when BIPOC students identify dolls that look like them as dirty or ugly, stupid or dull. Self expectations and motivations fall to substandard levels and can even create situations where students self harm or put themselves in dangerous situations because they have little self worth.

LGBTQIA+ students who are denied acceptance of who they are or denied the ability to self identify stop participating and start failing. Students should be allowed to change their screen names and pronouns as they identify themselves in web conferencing applications and similar situations. AEA & NEA Conference participants are already encouraged to rename themselves and to bring that autonomy into their classrooms. Doing less is not accepting or acknowledging our students and further denies them the ability to tell others how they see themselves and their purpose in this world. LGBTQIA+ students are facing attacks today at the legislative level where some of our elected leadership are attempting to change society and the acceptance of non-binary students by making it illegal for them to enjoy competing in sports or even to get the healthcare they need. This is a heinous attack on children, parenting and will have dire consequences, further traumatizing people in genuine need of acceptance. It is reminiscent of Jim Crow laws which attempted to prevent any push for activism or equality under the law. It may be possible for change to take place as we are allowed to hire and retain more specialists within the schools in the form of school psychologists, social workers, and counselors. Our communities have been fractured & traumatized, and there is a need to recognize what is good for the whole of the child over our individualized beliefs or frameworks.

Recommendation

There are currently multiple Micro-credential titles on BIPOC/LGBTQIA+ issues. Workshops and Webinars being offered do not speak directly to the inequities within the school system and it has become apparent that NEA has created new tiles to keep up with the demand. Explaining why it is important to recognize internal bias before we explain what it is may aid how others receive or self-

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reflect on this issue. Less defensiveness may result in better implementation as well as less resistance within a district.

As more webinars are created the appropriate level of marketing will also be necessary to ensure member saturation. There is further need to explore resolutions to support proactive school boards to collaborate with locals to explore and support events with a bigger LGBTQIA+ presence or engagement.

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

Charge 3: Review AEA guiding documents to ensure the appropriate use of language is adopted and racial & social justice in schools is acknowledged.

Report

This Committee determined that each committee member would review the AEA Constitution & bylaws and review the language of each to ensure our current language matches our Social Justice non-binary goals. Further, while some locals have a land acknowledgment for their local meetings, many may not know where or how to create one and should receive guidance or suggestions on creating a land acknowledgment.

Recommendations

The AEA Constitution and Bylaws appear to lack the pronouns “they, them & their” when referring to officer elections and member duties. Including this pronoun would bring consistency to the overall intent of including of non-binary members and officers and their duties or rights. A resolution will be sent to the Resolutions Committee to bring about this language for the Delegate Assembly meeting in May 2022. It is also recommended that AEA through the Resolutions Committee strongly recommend and encourage locals to implement native land acknowledgment statements at all formal meetings and events.

FINAL Recommendations for Resolutions Committee:

Three resolutions will be brought before the Resolutions Committee to bring our ideas into fruition:

- a. Be it resolved that locals seek training for members using NEA’s Honesty in Education resources.
- b. Be it resolved that all pronouns regarding the duties of officers within the AEA Constitution and Bylaws be updated from He/she, His/Him/Her/Hers to They, Theirs and Them.
- c. Be it resolved that all AEA strongly recommend and encourages locals to implement native land acknowledgment statements at all formal meetings and events.

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

Honesty in Education from NEA

Provided by J. Dwosh

Racial Equity and Soc. Justice Chairperson AEA-Retired

Resources:

Feel free to share the resources with your colleagues and across your networks.

Honesty In Education

NEA School Me Podcast E70: Know Your Rights Teach the Truth-Alice O’Brien

<https://www.nea.org/professional-excellence/student-engagement/school-me-podcasts>

NEA Teach the Truth : Know Your Rights

<https://www.nea.org/resource-library/teach-truth-know-your-rights-faq>

NEA EdJustice

<https://neaedjustice.org/>

NEA EdJustice - Honesty In Education

<https://neaedjustice.org/honesty-in-education/>

Race Equity Tool

<https://www.racialequitytools.org/>

Learning for Justice

<https://www.learningforjustice.org>

Teaching People's History: The Howard Zinn Project

<https://www.zinnedproject.org/>

#Resist Syllabus: Cultural Histories of Resistance in the U.S.

<https://ushistoryscene.com/article/resist-syllabus-cultural-histories-of-resistance/>

Social Justice Books for Teaching for Change

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<https://bookshop.org/shop/SocialJusticeBooks>

What You Should Know About State Measures Restricting Certain Instruction on Racism and Sexism

https://neaedjustice.org/wp-content/uploads/2021/08/2021.8.18-KYR_post.pdf

Critical Race Theory

Critical Race Theory is a Lens

<https://www.cnn.com/2021/05/27/us/critical-race-theory-lens-history-crt/index.html>

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

What Critical Race Theory Is-and What It Isn't

<https://www.yesmagazine.org/social-justice/2021/07/07/critical-race-theory-what-is-it>

What critical race theory is and isn't

<https://www.cnn.com/2020/10/01/us/critical-race-theory-explainer-trnd/index.html>

Talking About the Attacks on Critical Race Theory

<https://www.opportunityagenda.org/explore/resources-publications/talking-about-critical-race-theory>

What Is Critical Race Theory

https://www.youtube.com/watch?v=_N7kc1eN4E

If your local or state Association is interested in providing a presentation on Honesty in Education to its' membership, please have them contact Pam Rios prios@nea.org or Aaron Dorsey adorsey@nea.org.

ESP Membership Task Force

Task Force Members: Audrey Cunneely, Jennifer Tracy, AJ Nido (co-chair), Anastasia Jimenez (co-chair). **Staff Liaison:** Rony Assali

CHARGE1: Investigate and report on alternative methodologies for determining ESP dues, with recommendations by 2022.

Report

The ESP TF is actively collecting research and data from NEA to review and compare dues collection procedures, structures, and averages across NEA State Affiliates. This work is ongoing and should continue to happen. There are many data sets to include such as budget impact on dues changes, reasons for ESPs leaving, ESP membership trends, and studying various ESP rate tiers and their feasibility on a state-wide basis.

Recommendation

No recommendations will come this year as the budget still will start getting presented to the board in early February.

CHARGE 2: Develop conference and training outcomes for a successful AEA ESP Conference and monitor the conference to achieve those outcomes.

Report

Due to several variables including the planning time necessary to implement a conference, the unknown COVID procedures and protocol, and the calendar, the TF deems that a stand-alone AEA conference is not feasible for the Spring of 2022. The committee will meet to discuss training topics and the method to include ESP specific items in Summer Institute.

Recommendation

The recommendation is to implement ESP training (either as a stand-alone track or embedded in a variety of ESP focused sessions) during Summer Institute.

CHARGE 3: Create a document or training on best practices for how leaders of wall to wall local associations can better empower ESP members in order to support their priority issues.

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Report

The TF determined that this type of training is important to elevate ESPs within Wall-to-Wall locals.

Recommendation

The recommendation is to include this training (and supporting resources associated with it) in the Summer Institute ESP training options.

Finance and Revenue Committee

Committee Members: Patrick Castro, Kelley Fisher, Ken Freed, Marisol Garcia, Amber Gould, Bert Te Velde, Angela Philpot (chair), AJ Nido, Nancy Putman. **Staff Liaison:** Margaret Sleeper

Charges

1. Monitor the AEA budget development process. Review income and expenses and recommend adjustments based on actual revenue and Association needs and priorities.
2. Monitor and provide oversight to the AEA Audit Committee.

Report

The Finance and Revenue Committee met and reviewed the income and expenses of our organization. We discussed the AEA Strategic Plan and ensured our budget was in line with our objectives. We vetted different budgets and discussed the positive and negative aspects of each one before their presentation to the AEA Board of Directors.

Recommendations

The Finance and Revenue Committee will continue to review the Strategic Plan and Verify our budget is in line with the priorities of our organization.

Instruction and Professional Development Task Force

Task Force Members: Denise Albright (co-chair), Michelle Cappriotti, Estaban Flemons (co-chair), Melissa Girmscheid, Dorothy Green, Anastasia Jimenez, Jeff Lang, Christopher Kloth, Lisa Millerd, Corina Ontiveros, Michele Theisz. **Staff Liaison:** Nell Pederson

Charges

1. Assess and review AEA/NEA's current professional development offerings and what additional offerings we should be providing to members.
2. As needed, provide feedback, input, and guidance on state-level rulemaking, changes to standards, policy, and high-stakes testing.
3. Compile the latest research of proven teaching and learning strategies that have supported academic success during the COVID-19 pandemic. The final report should in a format that can be shared with members.

Report

The task force members met virtually this fall and winter to review the charges. We provided time during the first meeting for review of microcredentials on the www.aeapd.works page. This charge was like last year's charge, so our taskforce had a familiarity with the stacks being offered on the webpage. Those offerings could always be expanded, but the taskforce found the content to be satisfactory, as well as robust. The conversation shifted more towards what we can do as a union to encourage use of these professional learning opportunities in ways that strengthen our profession. While

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the members of the taskforce are clearly aware of what is offered, the average member is less likely to know about microcredentials. Some locals, such as Phoenix CTA, have had success in utilizing microcredentials as an alternative pathway for evaluations. We also discussed the possibilities of using microcredentials to receive college credit and for salary advancement. Upon thorough review of charge one, the taskforce found that the real question was how we can, as a union, encourage participation in these member-led learning opportunities, and how can we leverage our offerings to benefit and grow the union. The taskforce believes that member-led professional learning is important. In a time when the demands on educators are ever increasing, this is a way to allow our professionals the autonomy for self-directed learning at their own pace vis-à-vis the top-down model of professional development that many employers still latch on to.

The taskforce reviewed the second charge and determined a need for the union to continue providing training on submitting requests to speak at the legislature, as well as how to track and comment on bills.

To address the last charge, the taskforce researched, discussed, and reviewed learning strategies that have worked during the COVID-19 pandemic. These strategies were compiled into a reference guide for our members and can be found here: <https://tinyurl.com/IPDreferenceguide> .

Recommendations

The IPD Task Force recommends that the AEA Board work with locals to increase awareness of professional learning opportunities through union membership. Locals need more awareness of these opportunities, as well encouragement from the board to bring these opportunities to membership at the local level. The new QTL Learn and Lead Ambassador program is aimed at doing this and should be nurtured by AEA because it is our belief that this can be an effective tool for the union to grow membership and provide professional learning opportunities to more educators and educator support personnel.

Furthermore, we recommend that the board, at the state level, advocate for more teacher-led opportunities. For instance, we as a union can and should advocate for teacher-led professional development. Our members have a better understanding than the employer when it comes to what learning they need. With microcredentials we control our learning, and with this comes greater flexibility to when and where the learning occurs. It should be a union priority for every local to utilize AEA Microcredentials for strengthening the profession.

There are two practical ways we believe locals can immediately adopt professional learning opportunities. These were referred to as tracks in the 2021 IPD Task Force Report. We recommend that the board continues to promote these two tracks. The first is organizing around bargaining so that the union local and employer can agree to count microcredentials towards salary advancement. The second is for either individuals or PLCs to utilize our professional learning opportunities to better pedagogical practice and school community.

Our taskforce recommends the roll out at the local level to consider these components:

- 1) The local leader schedules a meeting with their Organizational Consultant.
- 2) The local leader should include the QTL Learn and Lead Ambassador in planning.
- 3) Identify two or more members to assist the QTL Ambassador in leading guided walkthroughs of our union microcredentials.

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4) The local should have the QTL Ambassador collaborate with the bargaining team to develop proposals and strategies that encourage district-wide adoption of the union's microcredentials, as well as for the purpose of salary advancement.

5) Additional information and resources regarding the union's microcredentials can be found here: <https://cgps.nea.org/micro-credentials/how-it-works/> .

Encourage local officers to complete their annual report in its entirety, which includes identifying a QTL lead from within their local. These QTL leads can also be QTL Learn and Lead Ambassadors. Encourage local officers to have agenda time for QTL report-outs.

Member Benefits Task Force

Task Force Members: Josh Atkins, Suzan Austin, Dana Busenbark, Anna Cicero, Melanie Cobos (chair), Cheryl Heath, Garrett Mehok, Tori Moreland, Karla Palafox. **Staff Liaison:** Sheenae Shannon

Charges

1. Review contracts with current vendors and make recommendations to the AEA Board of Directors as needed.
2. Identify and train Member Benefits (MB) Carousel Champions.

Report

The task force met on Saturday, October 30, 2021 and discussed the following: The first task force charge is met. At this time, no new recommendations are needed. The second charge requires upcoming AEA events, such as Delegate Assembly and Summer Institute, to be in person. With the knowledge that the 2020 virtual member benefit carousel was not as successful in a virtual environment.

The Task Force:

Agreed to meet at another date in early March once the AEA Board has made a decision regarding the format (In-Person or Virtual) of the 2022 AEA Delegate Assembly and Summer Institute. Currently scheduling a date to reconvene in March.

Will meet with Antonio Galinda with NEAMB and Lisa Almeida with California Casualty to plan out and discuss future member benefit carousel events and training sessions:

- Delegate Assembly,
- Summer Institute, and
- New Teacher Events

Discuss the identification and training of Member Benefits (MB) Carousel Champions.

Recommendations

The task force recommends the following:

1. Provide opportunities for Member Benefits to promote the NEA MB program at the 2022 Delegate Assembly.
2. Direct regions A, B, C, & D to identify an ambassador to work with NEA Member Benefits.
3. Provide at least two Member Benefits training sessions for local associations at the 2022 AEA Summer Institute.
4. Schedule an annual training of NEA Member Benefits program to AEA staff

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Resolutions Committee

Committee Members: Frances Banales, Kelly Berg, Gretchen Clifton (co-chair), Jennifer Chastain, Jennifer Pooler, Dan Ireland, Megan McCave (co-chair), Heather Schmitt. **Staff Liasion:** Jarrett Haskovec

Charges

1. Assist AEA members who are considering amendments to the AEA Constitution, Bylaws, Resolutions, and Delegate Assembly Standing Rules.
2. Assist AEA members drafting new business items at the Delegate Assembly.
3. *Revisit the newly passed AEA Resolutions to determine if statements require additional updating as it relates to conducting business during a crisis, such as a pandemic, and how such crises create shortages, inequities, loss of benefits, and require an emphasis on improved safety and communication.*

Report

1. Gretchen Clifton, the Resolutions Committee Co-Chair, asked committee members to review the AEA Constitution, Bylaws, Resolutions, Standing Rules and New Business documents to prepare for the AEA Delegate Assembly.
2. Jarrett Haskovec informed members that he will need assistance at the Delegate Assembly fielding amendment and new item requests.
3. The committee then worked on Charge #3.

The following amendments to the resolutions were proposed. Added language is in caps and highlighted.

Section A

13. Student and Staff **HEALTH AND** Well-Being

The AEA believes that a comprehensive approach to student and education employee safety is paramount to a quality education. This should include physical, social, and emotional safety, **IN ADDITION TO SAFE SITE AND BUILDING FACILITIES.** Appropriate agencies must use their authority to ensure such conditions.

THE AEA BELIEVES THAT MEASURES SHALL BE TAKEN TO PRESERVE STUDENT AND EDUCATION EMPLOYEE SAFETY, AND THAT ANY SUCH MEASURES SHOULD BE ROOTED IN RESEARCH-BASED STRATEGY AND SCIENCE.

Section B

36. Benefits

The AEA believes that school districts must provide and pay for benefits including, but not limited to, the following:

- a. appropriate sick leave with unlimited accumulation;
- b. comprehensive health, life, long-term disability, dental, and vision insurance including dependent and domestic partner coverage; (08)

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c. leaves (**PUBLIC SAFETY**, personal, association, sabbatical, parental, leaves of absence) in which case AEA encourages local school districts to provide job security and job assignment; and

d. employee assistance programs. (05)

Section E

7. Federal and State Funding Shares

The AEA, in accord with the National Education Association, believes that the federal share of the cost of public education should be at least one-third. Educational funding should be budgeted separately in recognition of its high priority in the federal budget.

IN ADDITION, THERE SHOULD BE PUBLIC TRANSPARENCY WITH RESPECT TO THE USE OF ALL FEDERAL FUNDS. (02)

The following NEW resolution was proposed.

Section A

11. Robust Recruitment and Retention of Quality Educators

a) The AEA acknowledges that fully staffed schools are required for student physical, emotional, and academic success and safety. In order to keep schools fully staffed, districts should create and maintain robust recruitment and retention programs for qualified professionals in all areas, with special attention to hard-to-fill positions.

b) The AEA acknowledges that in a time of crisis, it is even more difficult to keep schools fully staffed. Therefore, priority should be given to providing and maintaining supports and incentives that keep quality professionals in schools.

c) The AEA advocates for shared financial responsibility of recruitment and retention programs among all appropriate government and district stakeholders in order to ensure fully staffed schools.

11. 12. Auxiliary School Employees

Recommendations

Gretchen Clifton and Megan McCave, the Resolutions Committee Co-Chairs and committee members will assist AEA members at the Delegate Assembly with the AEA Constitution, Bylaws, Resolutions, Standing Rules and New Business Items.

Gretchen and Megan will present the proposed resolution amendments at the AEA Delegate Assembly.

Bargaining and Working Conditions Task Force

Task Force Members: Jay Barbuto, June Blaine, Frank Hunter, April Coleman, Jason Freed, Kerri Glover, Emily Godlove, Daniel McCloy, Antonio Mitchell, Victoria Schroeder (co-chair), Susan Seep (co-chair). **Staff Liaison:** Greg McQuade

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Charges

1. Execute best strategies to organize local associations' negotiated agreements, memoranda of understanding, and Prop 301 plans and make them digitally accessible to leaders throughout the state.
2. Review the use of coordinated bargaining strategies during regional conversations that contributed to greater local success in bargaining.
3. Propose strategies to support our local associations' ability to impact the use of ESSER and ARPA funds within their district.

Report

The Bargaining and Working Conditions Task Force met on October 30, 2021; December 11, 2021; and January 6, 2021, to discuss and execute the charges.

Recommendations

Charge #1

- Finalized Bargaining Info at a Glance with recommendations to link additional information as an Appendix as well as a request to update graphic design. Document was sent to all bargaining chairs, presidents, and staff in mid-January
- Consider adding language and/or link to policy vault to make it more accessible.
- Discussed breaking bargaining survey into smaller chunks, as well as the request for AEA staff to ask locals for specific good language for policy vault.
- Compile 1-pager for locals to highlight timely bargaining goals, ideas, or inspiration.
 - Consider including level of input (e.g., stakeholder meetings) as a negotiating goal.
 - Include reminder for locals to message the local's role in developing the win.
 - **Goal -- Have 1-pager out to locals in mid-February.**
- Focus on making information out to presidents and bargaining chairs ingestible and manageable in brief periods of time. Consider asks for highlights rather than full documents.
- Provide local presidents/bargaining chairs a list (1-pager), at the beginning of the year (like, in the summer) of ways we want them to engage with the bargaining resources folder per year.
- Send out requests for local bargaining team input at the beginning of the year. Possibly create a few (Jul/Aug, Dec/Jan, May) much shorter surveys during the year.
 - Create somewhat of a Table of Contents for the year with short blurbs for Presidents and bargaining chairs to review and link to longer advisory or language
 - Highlights of bargaining in a report may be enticing rather than a full settlement report. Chunk it
 - Promoting Policy Vault and accessibility

Charge #2:

- Consider a virtual idea board where local presidents or bargaining chairs can post questions and/or solutions to them. (JamBoard is a Google-compatible app and so might be able to be housed in the same Google Drive.)
- Possible organic groupings of locals -- geography, shared interest, local size, political climate of local school community. There is a possibility locals would be grouped in more

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than one way, depending on particular issues -- and those groupings could change over time. Contact list with how association grouped themselves (somewhat of a ranking); categories based on variety of demographics and bargaining position in district

- Giving time at places like Bargaining Conference, some monthly regional leaders meetings, Summer Institute, etc., to discuss bargaining goals and coordination. We would need a reporting mechanism that goes back to this group to help make connections. Focus on providing time and space to do the things we're asking members and local associations to do.
- Consider re-surveying locals regarding their interest in participating in a coordinating bargaining team.

Charge #3:

- Accelerated communication pieces on ESSER and ARPA.
 - What's allowed and not allowed?
 - What are other locals/districts doing?
 - We will need to quickly collect information from locals, then quickly report out what local successes have been.
 - Note: ESSER funds will be part of Cash Analysis Reports this year.
 - First survey sent in November focusing on:
 - What did "meaningful conversations" with stakeholders look like in your district? (Check boxes + "Other.")
 - How did your district commit to spending ESSER dollars? (Check boxes + "Other.")
 - How do we help locals where districts already decided on spending without meaningful input from associations? (Is this a way to start to build regional bargaining teams with a common interest and/or with a common background/climate?)
 - Build Timeline for process and input since priorities may change yearly. Association town hall meetings to engage members and community members

Membership and Organizing Task Force

Task Force Members: Sarah Bennett, Keri Blaker, Sandra Cobos, Michele De La Rosa John, Kelly Fisher (co-chair), Amber Gould, Becky Williams (co-chair), Nicole Wolff, Reina York. **Staff**

Liaison: Leah Koistinen

Charges

1. Create a shareable database of supportive organizing tools for locals to organize around safe schools.
2. Create and support an ongoing database of local EA successful organizing strategies and wins that are focused on safe and healthy schools.

Report

The committee created a Safe Schools Now survey that was shared with local presidents. The survey contained the following questions:

Contact Information

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Was your local association able to negotiate around any of the AEA Safe Schools Now Priorities?

If yes, can you please identify which of the priorities you were able to organize around and/or negotiate for in your district?

Can you please share, in as much detail as possible how you organized, what you negotiated for and what the outcome of this was?

Are there any tools/tips you feel would help other locals when organizing or negotiating around these issues?

The initial survey yielded responses from thirteen locals.

5 (38.5%) locals reported success in negotiating around the AEA Safe Schools Now Priorities. Reporting locals seemed to be able to organize around some, but not all the priorities. A few mentioned that as the pandemic continued, it actually became more difficult to get wins around these priorities.

Organizing strategies mentioned included:

Meeting with district administration either as union leadership or as union representation on district health and safety related committees was a key strategy for several locals.

Locals conducted "Ask Your Union" virtual events and conducted surveys to gather questions/concerns/and data from members to use in conversations with the district.

Negotiating and organizing around Education Support Professional health and safety issues.

It was suggested in the survey that presidents could take time during the Wednesday night leadership calls to discuss organizing tactics around the AEA Safe School Priorities (preferably in breakout rooms).

The committee discussed ways to gather information and tools in an on-going manner.

It was decided that a continuation of the initial survey and conversations during the Wednesday night leadership calls would help with this process.

This would also help keep the priorities in the spotlight.

Recommendation

The AEA President continue to provide time and space for local presidents to discuss additional strategies around the AEA Safe School Priorities during the Wednesday leadership call.

Have local leaders meet in breakout rooms and report out to add strategies to those collected in the survey.

Create a document to share the organizing tools discussed as well as any organizing tool kits already created by the AEA and make it accessible to locals on the AEA website.

An on-going database, starting with the strategies and tools listed above, be included on the AEA website. The list will include a survey link for locals to add to the list as organizing wins occur. The list will be updated as local leaders share wins during the Wednesday night leadership calls and other meetings where union leadership is able to discuss organizing opportunities. As locals continue to organize around additional topics not related to health and safety, this database could evolve to include those tools and wins as well.

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Rural Schools Task Force

Task Force Members: Carolyn James, Brita Kimble, David Lipski, Nicole Parker (co-chair), David Rice (co-chair), Jason Teauge, Margie Tsoie. **Staff Liaison:** Leah Koistinen

Charges

1. Current impacts and needs of rural schools and connected communities
2. Examine New Vision for Arizona Schools 2.0
3. Communication tool for rural local associations and statewide leaders

Report

The Rural Schools Task Force met and discussed the current impacts and needs of rural schools and connected communities before examining the New Vision for Arizona Schools 2.0 and discussing a communication tool for rural local associations and statewide leaders.

Recommendation

The task force recommends that AEA assemble a quarterly Rural Schools meeting for leadership of rural locals to collaborate and discuss needs and supports that are unique to rural schools and their connected communities. In addition, the task force recommends that AEA form a Facebook group for leadership of rural local associations to connect, collaborate, and support each other as well as to communicate with statewide leaders. This will provide rural local leaders with the opportunity to communicate and collaborate on the specific issues that rural areas face when time permits and as needs arise.

2022 AEA LEGAL DEFENSE FUND

The AEA Legal Defense Fund primarily helps finance legal services to defend members in employment related disputes that adversely affect the member's employment, such as dismissals, contract disputes, and revocation of teaching certificates. Most employment disputes are resolved at the local level, but sometimes lawyers are needed both to defend members at formal hearings and to advise members and AEA staff. The General Counsel screens cases referred through the AEA Help Desk or by AEA staff and leaders to determine the best approach for resolving each problem and to determine whether the case meets Defense Fund Guidelines. The General Counsel and AEA staff and leaders work together to assist members.

During fiscal year 2020-21, Legal Defense Funds were used to assist in over 45 member cases involving significant employment disputes (compared to 100 cases in FY 20-21, 135 cases in FY 18-19, 228 in FY 17-18; and 171 in FY 16-17). In addition to the Legal Defense Fund, AEA provides several other types of assistance to members facing legal problems. For example, AEA continues to operate the AEA Help Desk, and during FY 20-21, the AEA Help Desk staff resolved 527 inquiries from members or leaders assisting members, in addition to assisting Organizational Consultants and Local Leaders working with hundreds of other members in the field. Through separate budget funds, AEA provides this assistance by Organizational Consultants and the General Counsel.

In May 2016, AEA joined a coalition of education groups to challenge inadequate capital funding for Arizona schools. This case is still active and ongoing. The parties have completed discovery and have filed motions for summary judgment. The parties are awaiting the court's decision.

In August 2021, AEA and others brought a lawsuit challenging the Arizona Legislature's actions in the recent passage of Budget Reconciliation Bills (BRBs) that violate certain requirements in the Arizona Constitution requiring a single subject and notice of the bill's contents. The K-12 and other BRBs contained substantive policy revisions, including a prohibition on mask mandates and restrictions on what can be taught, that were not related to budget reconciliation or general appropriations. The trial court declared these provisions unconstitutional, and the Arizona Supreme Court unanimously affirmed.

Members also can obtain discounted legal services for certain personal and family law problems through NEA's Attorney Referral Program. AEA active members have liability insurance coverage for employment-related lawsuits filed by parents and students and should submit insurance claims immediately upon receiving notice of the lawsuits. Also, if AEA active members are exonerated of employment-related crimes, they should submit insurance claims for their criminal defense expenses.

Legal services are expensive, costing at least \$150 per hour even after a substantial discount. The following chart shows a typical range of legal fees and costs:

Initial consultation:	\$400–600+
Simple negotiated settlement:	\$1,000–3,000+
Complex negotiated settlements: (including substantial hearing preparation or research)	\$3,000–5,000+
Administrative hearings (not including appeal):	
Teacher or ESP dismissal:	\$5,000–15,000+
Teacher certificate revocation:	\$5,000–15,000+
Court cases:	\$20,000–150,000+

Additional Figures - FY 20-21 Cases:

- 88.4% civil matters; 11.5% criminal,
- 33.3% related to a dismissal or termination,
- 27.1% related to an evaluation or certification related issue.

2022 AEA LEGAL DEFENSE FUND

AEA also publishes documents that provide information on a wide variety of topics for the benefit of local leaders and members. AEA is in the process of determining the best way to allow members to access these documents online with the advent of the new AEA website.

- [Arizona Revised Statutes Reference Guide](#) - Use this index to find the Arizona laws used most frequently by school employees.
- [Child Abuse](#) - Learn the legal definition of child abuse, how to report suspected child abuse, and how to lessen the risk of being falsely accused.
- [Deadlines for Legal Action](#) - Refer to this brochure as a general guide for establishing a time limit for suing in a civil case or for prosecuting a crime.
- [Employee Rights for Arizona Teachers](#) - Refer to this summary of Arizona laws for answers to the most commonly asked questions about teacher contract and tenure issues.
- [Employment Discrimination](#) - Find out what is needed to prove illegal employment discrimination based on race, color, national origin, religion, sex, age and disability. Learn how to report discrimination, request a reasonable accommodation for a disability, and the special issues faced by gay and lesbian employees.
- [ESP Employment Problems](#) - Use this guide to help resolve educational support personnel work problems.
- [Evaluation Concerns](#) - Practical suggestions for local association leaders to help their colleagues with performance evaluation concerns.
- [Falsely Accused](#) - School employees who are falsely accused of a crime may need assistance in returning to work and/or restoring a good reputation. These suggestions may be helpful. Learn the questions to ask when feeling wrongfully accused.
- [Fingerprint Clearance Cards, Frequently Asked Questions](#) - Learn how to obtain a fingerprint clearance card, even if you have been denied initially.
- [Free Speech for School Employees](#) - Learn what kinds of speech are protected by the First Amendment to the U.S. Constitution.
- [Guide to Grievances in Arizona Schools](#) - Use this training guide to help leaders and association representatives resolve workplace problems.
- [Helping School Employees with Parent Relationships](#) - This booklet contains guidelines and suggestions for dealing with parents who may be difficult, excessively annoying, hostile, or demanding.
- [Interpreting School Policies](#) - Use this advanced booklet to understand and interpret ambiguous language in school policies and contracts.
- [Reporting Serious Misconduct](#) - Follow these guidelines to be a whistleblower and obtain protection from retaliation.
- [Requesting Public Records](#) - Use these step-by-step instructions and sample letters for requesting public records.
- [Resigning](#) - Learn the questions to ask before you resign or retire.
- [Suggestions for Appropriate use of Technology](#) - These practical suggestions will help school employees avoid employment problems related to the use of school and personal computers.
- [Sexual Harassment](#) - Learn how to respond if you are a victim of sexual harassment and how to lessen the risk of false harassment accusations.
- [Should You Sue Your Employer?](#) - Learn the questions to consider before you decide to file a lawsuit.

2022 AEA LEGAL DEFENSE FUND

- [Tips for Witnesses](#) - Read these common sense suggestions before you write an incident report, answer questions from an administrator, or testify at a hearing.
- [Violence and Threats at School](#) - Share this booklet with any member who has been a victim of violence or a threat or who has been accused of committing a crime at school.
- [When Employees Get Hurt or Sick](#) - Compare the basic benefits available to employees from Worker's Compensation, the Family and Medical Leave Act, Disability Insurance, and the Americans with Disabilities Act.
- [Writing Persuasively](#) - Practical tips for writing effectively on behalf of members.

2022 DELEGATE ASSEMBLY SUBMISSION FORM

Use a separate form for each item submitted. Refer to the Delegate Assembly Guide for New Business Items and Amendments to Standing Rules, Legislative Platform, and Resolutions instructions, including timelines, for completing this form. Complete all four sections below (1, 2, 3, 4).

1. Check one of the following to indicate type of submission:

- [AEA Constitution](#) Article _____ Section _____
- [AEA Bylaws](#) Article _____ Section _____
- [AEA Standing Rules](#) No. _____
- [AEA Legislative Platform](#) Goal _____ Objective _____

New Business Item: New Business Items express the will of the Delegate Assembly on matters which relate to the operation of the Delegate Assembly or programs of action for the Association. They are specific in nature and terminal in application (typically one calendar year) and refer to the AEA Strategic Plan.

Strategic Objective (check one)

- I *Building a powerful union of educators by engaging our members, developing leaders, and organizing strong and relevant locals.*
- II *Creating the public schools our students deserve.*
- III *Provide for management and development of a professional staff focusing on implementing and operationalizing the direction set for the Association by the Association's governance decision-making bodies.*

Goal _____

Resolutions

Resolutions are formal expressions of opinion, intent, belief, or position of the Association. They shall set forth general concepts in clear, concise language, shall be broad in nature, and shall state the positions of the Association in a positive manner. The Resolution Committee has the authority to originate resolutions and to edit, consolidate, revise, and reject submitted resolutions.

Core Value (check one)

- A. Quality public education for all**
- B. Fairness, equity and respect for all**
- C. Teaching as an esteemed profession**
- D. Education Support Professionals As Valued Partners**
- E. Learning as a community commitment**

Item Number _____ New Item? Yes No Page No. Title . _____

2. Proposed addition, deletion, or change for item checked in Section 1 above:

3. Rationale

State rationale in 50 words or less. Specify how adoption of the proposed item will achieve the mission, strategic focus, core values, strategic objectives, and/or strategies of the AEA and how it should be implemented.

4. Submitted on behalf of _____ (Self, local affiliate, committee, recognized caucus, etc., if any)

Submitted by _____ Phone No. _____

Mailing Address _____
(Street, City and Zip Code)

Local Affiliate _____ E-mail Address _____

For AEA Staff Use Only

Staff Hours _____ **Cost of staff time:** _____ **Additional Expenses:** _____

Reviewed by _____

INSTRUCTIONS FOR COMPLETING SUBMISSION FORM

TIMELINES FOR SUBMITTING SUBMISSION FORM

1. Proposed changes to the AEA Constitution and the AEA Bylaws **must** be received by 5:00pm on **March 7, 2022**, for consideration by the 2022 Delegate Assembly (at least 60 days before the vote).
2. Proposed changes and/or proposed additions to the Standing Rules, Resolutions, and New Business Items **must** be received by 5:00 pm on **March 17, 2022**, for advance printing.
3. Proposed changes and/or proposed additions to the Standing Rules, Resolutions, and New Business Items may also be submitted at the Delegate Assembly during appropriate times, but may not be mailed, faxed, or electronically submitted at that time.

MAIL, FAX, OR ELECTRONIC VERSION: Mail the completed form to Arizona Education Association, Attn: Nicole Adams, 345 E Palm Lane, Phoenix, AZ 85004-1532. You may also transmit via facsimile to AEA, Attention: Nicole Adams at (602) 240-6887, or email the completed Submission Form to nicole.adams@arizonaaea.org. If you need further assistance, please contact the Co-Chairs of the *AEA Resolutions, Standing Rules, Constitution, and Bylaws Committee*, Gretchen Clifton at gretchen.clifton@gmail.com and Megan McCave at megan.mccave@gmail.com, or Resolutions Committee Staff Liaison, Jarrett Haskovec at jarrett.haskovec@arizonaaea.org.

In using this form,

- Use a separate form for **each** item submitted.
- Mark the appropriate box clearly to show the type of submission.
- Consult the AEA's Strategic Plan or a member of the Resolutions Committee to determine the appropriate strategic objective and strategy for each item submitted.
- Keep a copy for your own records.

The format for the language being submitted or amended is to use ~~strike-through~~ language you wish to delete and/or to use ALL CAPS for language you wish to add.

EXAMPLE

The AEA maintains that the Arizona State Retirement System (ASRS) should be controlled by an autonomous board of trustees, INCLUDING REPRESENTATIVES OF EMPLOYEE GROUPS ~~two (2) members elected by the members of each public Employee group and three (3) appointed by the governor~~. This board should have the policy and investment authority.

RESOLUTIONS AND NEW BUSINESS ITEM SUBMISSION

RESOLUTIONS

Resolutions are formal expressions of opinion, intent, belief, or position of the Association. They shall set forth general concepts in clear, concise language, shall be broad in nature, and shall state the positions of the Association in a positive manner.

Example of a Resolution:

The AEA believes that the private, non-school-related lives of school employees must not be used as factors in their employment or evaluation.

Consider the following verbs when writing your resolution: advocates, believes, calls (for, upon), emphasizes, encourages, endorses, recognizes, recommends, supports, urges.

NEW BUSINESS ITEMS

New Business Items express the will of the Delegate Assembly on matters which relate to the operation of the Delegate Assembly or programs of action for the Association. They are specific in nature and terminal in application. (They have an ending date, typically one calendar year from the date of the Delegate Assembly.) They refer to the AEA Strategic Plan.

Example of a New Business Item:

The AEA will prepare a position paper on its role in the evolutionary development of charter schools in Arizona. The position paper will be distributed at the AEA Delegate Assembly in May 2023.

Strategic Objective:

2

Goal:

C

Rationale: Charter schools are impacting the availability of sparse resources for public schools in Arizona. The AEA needs to participate in the evolutionary development of charter schools to ensure quality education for kids.

Consider the following verbs when writing your new business item: [Used most often with shall (not) or will (not)] design, pursue, direct, analyze, develop, establish, seek, obtain, provide, study, participate, monitor, recommend, sponsor, convene, work, cooperate, explore, initiate, authorize, continue.