

EQUITY FUND APPLICATION FORM

LOCAL AFFILIATE: _____

SECTION A

I. Amount of Local Dues 20____/20____ Year \$ _____

Amount of Local Dues Previous Year \$ _____

II. Number of Eligible Members _____

Number of Members _____

Membership Percentage _____

Agency Fee Payers _____

III. Reason for Request - Check Appropriate Boxes

- | | |
|--|---|
| Contract Dispute <input type="checkbox"/> | Contract Maintenance <input type="checkbox"/> |
| Contract Rejection <input type="checkbox"/> | Legal Actions <input type="checkbox"/> |
| Bargaining Election <input type="checkbox"/> | Other (Please Explain) <input type="checkbox"/> |

Requested Amount: Grant \$ _____ Loan \$ _____

Prepared by: _____

Local Association President Date

For Equity Fund Committee Use Only

Meeting Date: _____

Amount: Grant \$ _____ Loan \$ _____

Application: Approved Disapproved Other



SECTION B

Total Local Association Budget 20____/20____ \$ _____

Budget Expenditure as of _____ \$ _____
Date

Budget Balance as of _____ \$ _____
Date

Outstanding Budget Obligations \$ _____

Explanation:

Current Assets (e.g. savings accounts, etc.) \$ _____

Special Note:

1. Please attach all outstanding bills related to your monetary request for assistance by the Equity Committee.
2. Please attach a copy of your present local association budget.
3. Attach any additional documentation that you believe will assist the Equity Committee.

SECTION C

A. Amount of dues received to date LOCAL \$ _____
(Cash & Payroll Deductions)

CEA/NEA \$ _____

TOTAL \$ _____

B. Amount transmitted to CEA to date CEA/NEA \$ _____

C. _____ additional transmittals of \$ _____ each will be received from the Board
of Education on (list dates) _____.

Connecticut Education Association

Equity Fund Guidelines

The Equity Fund's purpose shall be to provide equity among all affiliates in dealing effectively with financial problems under the following guidelines:

1. The Fund shall be available only to affiliates of the CEA and NEA.
2. The fund shall make available financial resources to assist affiliates in coping effectively with extraordinary situations.
 - (a) where local resources are limited due to size, or
 - (b) where all local resources have been exhausted.
3. The fund shall be available to meet only those expenses which were incurred on the advice and consent of the CEA through the office of the Executive Director:
 - (a) Contract Negotiations
 - (b) Contract Maintenance
 - (c) Representation Elections
 - (d) Legal Actions
4. It shall be explicitly understood that the Equity Fund is not available to pay the costs of attorneys, other persons, or services engaged unilaterally by an affiliate.
5. The affiliate applying for assistance shall submit the completed Equity Fund Application Form to the committee.
6. The Equity Fund Committee shall meet with appropriate representatives of the affiliate who shall document the request.
7. The Equity Fund Committee shall consult with the appropriate staff concerning the affiliate's request.
8. Allocation of monies from the Equity Fund shall be the responsibility of the Equity Fund Committee based upon the committee's evaluation of the case.
9. The affiliate shall have the right to appeal the decision of the Equity Fund Committee to the CEA Board of Directors whose decision shall be final.

