

Oklahoma Education Association Incentive Rebate Policy Program Summary

I. PURPOSE

To offer a financial incentive to local affiliates for:

- Maintaining membership at a level equal to the prior year
- Increasing membership over the prior year
- Pre-paying its annual OEA/NEA dues obligation
- Full-time release officers
- Employing secretarial and clerical help
- Establishing or maintaining a local office

II. REQUIREMENTS

No rebates will be paid to locals which have not followed all guidelines. Any requests for exceptions will be brought to the OEA Board of Directors by the Board member who represents the local making such request. Requests should be accompanied by exhibits supporting the request.

A. DUES PAYMENT SCHEDULE

To be considered for one of the areas in which rebates are offered, a local affiliate must first meet the following basic payment schedule:

- A minimum of 20% of the yearly obligation paid by December 15
- A minimum of 30% of the yearly obligation paid by January 15
- A minimum of 40% of the yearly obligation paid by February 15
- A minimum of 50% of the yearly obligation paid by March 15
- The remaining payments must be made in accordance with the affiliate's payment schedule as outlined on the monthly dues bill received by the payroll clerks from the OEA.

B. MEMBERSHIP

1. An affiliate that maintains the same FTE level of membership as the prior year will receive a rebate equal to \$2 times each FTE member. See note regarding FTE below.
2. An affiliate that increases its membership level over the prior year will receive a rebate equal to \$2 times each FTE member. In addition, for each additional FTE over the prior year's FTE member level, an affiliate will receive a Membership Bonus of \$50. (See note regarding Membership Bonus below).
3. An affiliate with a membership enrollment of 100% of potential will receive a rebate equal to \$4 times each FTE member. An affiliate can qualify for only one of the membership rebates in Part B.

(NOTE: Full-Time Equivalency Membership – FTE membership is defined as an affiliate's total OEA dues obligation divided by the annual OEA dues amount for a certified active member.)

(NOTE: Membership Bonus – The membership bonus will be paid for the first year of membership only. Membership bonuses will be paid with the second installment of the incentive rebate.

Membership bonuses will be determined by comparing the affiliate's current year FTE membership level to the affiliate's prior year FTE membership level as reflected on the OEA records as of August 31 each year.

C. DUES

1. An affiliate that pays 100% of its yearly obligation by January 1st of the current year will receive a rebate equal to \$10 times each FTE member.
2. An affiliate whose local dues are \$25 or more will receive a rebate equal to \$4 times each FTE member and an additional \$4 for the next \$25 increment for a maximum of \$8 times each FTE member.

CI. OFFICERS, SECRETARIAL AND CLERICAL

1. An affiliate with a full time release officer will receive a rebate equal to \$30 times each FTE member; for a half-time release officer the rebate shall equal \$15 times each FTE member; if less than half-time, no rebate will be given in this category.
2. An affiliate with full-time secretarial or clerical help will receive a rebate equal to \$8 times each FTE member; for half-time, \$4 times each FTE member; and for less than half-time, no rebate will be given in this category.

CII. LOCAL OFFICE

1. For establishing and maintaining a local office, a local affiliate will receive a rebate equal to \$3 times each FTE member. To qualify, the following OEA guidelines must be followed:
 - a) An office must be operated by the local association;
 - b) It must be opened on a regular basis;
 - c) It must be available for use by other locals for Association meetings;
 - d) The office may not be located on school property.

III. MAXIMUM PAYMENTS

The maximum rebate payable to a local affiliate shall not exceed \$60 times each FTE member plus the amount of any Membership Bonus, if applicable.

IV. OBLIGATION

It is the responsibility of the local affiliate to verify and certify the accuracy of its yearly OEA dues obligation as shown by OEA. No rebate will be paid in October if any obligation remains on the OEA books. The total dues received by OEA must equal the total obligation for the year.

The first installment (50%) of the rebate will be calculated on the affiliate's total FTE. FTE will be based on the OEA dues obligation reflected on the OEA books as of March 30.

The rebate will be recalculated on the affiliate's total FTE. FTE will be based on the OEA dues obligation that is on the OEA books as of August 31. This amount less the first installment will be paid in October.

V. PAYMENT METHOD

Incentive rebates will be paid in two installments; the first by April 30th and the second by October 31st.

VI. APPLICATION FOR PAYMENT

Application for incentive rebates must be on file in OEA Headquarters by March 20. Applications received or postmarked after the deadline will have a 1% (of total rebate) deduction penalty from the rebate for each day the application is postmarked after March 20. If March 20 falls on a Sunday, a postmark of March 21 will be accepted.

**OKLAHOMA EDUCATION ASSOCIATION
APPLICATION FOR INCENTIVE REBATE**

I. WE HEREBY CERTIFY THAT WE HAVE MET THE REQUIRED PAYMENT SCHEDULE OUTLINED IN SECTION II OF THE INCENTIVE REBATE POLICY AND HAVE PAID TO OEA AT LEAST 50% OF OUR TOTAL ANNUAL OBLIGATION BY MARCH 15. WE ALSO UNDERSTAND WE MUST CONTINUE TO PAY ACCORDING TO OUR STATEMENT IN ORDER TO QUALIFY FOR OUR SECOND INSTALLMENT.

_____ (signature)

CHECK ONLY ONE	<input type="checkbox"/> SAME LEVEL OF MEMBERSHIP AS LAST YEAR <input type="checkbox"/> INCREASE IN MEMBERSHIP <input type="checkbox"/> 100% ENROLLMENT
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II. WE ARE APPLYING FOR A REBATE IN THE FOLLOWING CATEGORIES (PLEASE CHECK THOSE THAT ARE APPLICABLE).

- D. 100% OF ANNUAL DUES OBLIGATION HAS BEEN PAID BY JAN. 1
- E. LOCAL DUES OF \$25 OR MORE (AMOUNT OF LOCAL DUES PER MEMBER \$ _____)
- F. FULL-TIME RELEASE OFFICER (# OF HOURS PER WEEK _____)
- G. 1/2 -TIME RELEASE OFFICER (# OF HOURS PER WEEK _____)
- H. FULL-TIME SECRETARIAL/CLERICAL HELP (# OF HOURS PER WEEK _____)
- I. 1/2-TIME SECRETARIAL/CLERICAL HELP (# OF HOURS PER WEEK _____)
- J. LOCAL OFFICE, AVAILABLE TO OTHER LOCALS FOR ASSOCIATION MEETINGS

ADDRESS: _____

HOURS OF OPERATIONS: _____ DAYS PER WEEK: _____

III. **CERTIFIED BY:**

AFFILIATE NAME: _____

AFFILIATE PRESIDENT: _____

ADDRESS: _____

PERSON **COMPLETING** THIS FORM: _____

TITLE: _____

PHONE# (HOME): _____ (SCHOOL): _____

E-MAIL ADDRESS: _____

AFFILIATE TREASURER: _____

DATE: _____

APPLICATION DEADLINE MARCH 20TH