

Correspondence – National Education Association

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NATIONAL EDUCATION ASSOCIATION • 1201 16th St., N.W., Washington, D C 20036 • (202) 833-4000

DR. HELEN D. WISE, President

TERRY HERNDON, Executive Secretary

August 30, 1973

The Honorable Robert Strauss, Chairman
Democratic National Committee
1625 Massachusetts Avenue, N.W.
Washington, D. C. 20036

Dear Chairman Strauss:

I have attended the six regional DNC meetings held by Governor Carter and the recent training meeting for state-wide incumbents in Easton, Maryland. I would like to express my gratitude to you and the Governor for inviting me to attend these events. They have been extremely helpful to me and to the political program of the National Education Association.

I must commend you for selecting Governor Carter to head the DNC Campaign Committee. He has brought enthusiasm and energy to a most difficult task. Perhaps most significantly the effort of Governor Carter is bringing to the party a clearly identifiable and long overdue campaign program. It seems to me that such a program is a much needed vehicle for not only winning elections, but uniting the party.

The training session in Easton was a marvelous first step by the National Committee to meet a much neglected need. I would strongly encourage the DNC to continue this program. Your success in 1974 might very well hinge on specially tailored training programs for congressional challengers, freshmen and marginal incumbents! I would particularly encourage the DNC to take the training to the field by having regional sessions, at least for the challengers.

The National Education Association is happy to have been included in this effort and we look forward to working with you in the future.

Sincerely,

A handwritten signature in cursive script that reads "L Vaughn Baker".

L. Vaughn Baker
National Education Association

cc: Governor Jimmy Carter



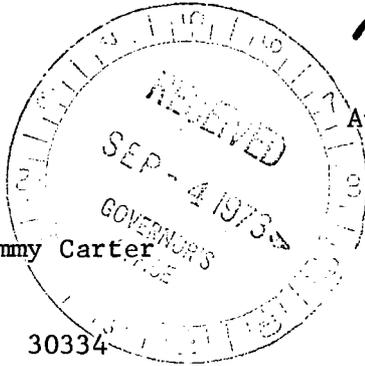
NATIONAL EDUCATION ASSOCIATION
DR. HELEN D. WISE, President

To: Tina
Baron
Reese
6/26

Alan -
Look this
over - Comment
J

1201 16th St., N.W., Washington, D C 20036 • (202) 833-4000
TERRY HERNDON, Executive Secretary

7/9



August 30, 1973

The Honorable Jimmy Carter
Executive Office
The Capitol
Atlanta, Georgia 30334

MR. LUTZKER
AND I NEED
YOUR COMMENT
AND OPINION
BEFORE I CAN
COMMENT.
THANKS,
H.Q.

Dear Governor Carter:

Pursuant to our conversation last week in Easton, Maryland, I am enclosing a research proposal prepared for our office by Matt Reese and Associates. I think you will find that it addresses your idea about using the Democratic National Committee as a clearinghouse for national demographic and polling data. The National Education Association has given this proposal a great deal of study and we believe that the concept has great merit. Although we would like to initiate this program, at present, due to budget considerations, we are unable to implement it.

If I can provide more information or assistance on this subject, please feel free to call on me.

Sincerely,

L. Vaughn Baker

L. Vaughn Baker
National Education Association

LVB/cd

Enclosure

cc: Reese, Whelan, Nace, Murphine

September 19, 1973

Mr. Vaughn Baker
National Education Association
1201 16th Street, N. W.
Washington, D.C. 20036

Dear Vaughn:

I have been out of my office for the last ten days and have just read your very kind letter. I hope you know how much I have enjoyed working with you this summer and am looking forward to a continuing relationship with you and your organization.

I have reviewed the research proposal which was prepared for NEA by Matt Reese. I found it to be useful information and am forwarding a copy to Hamilton and Paul for their own review and use. We had our meeting with several prominent national pollsters earlier this week and believe we made some progress. I will give you more details when we get together.

I have not forgotten about your excellent suggestion for a small meeting in the near future to review the '74 races and come to some consensus on key races. Hamilton is looking for a date in early October for us to have such a meeting and will be in touch with you.

My thanks again for your kind comments, and I hope to see you soon.

Sincerely,

Jimmy Carter

JC/tb

cc: Hamilton Jordan
Paul Lutzker

*\$ 300,000
20 campaigns*

IMMEDIATE PROPOSAL

TO

NATIONAL EDUCATION ASSOCIATION

BY

MATT REESE & ASSOCIATES

CAMBRIDGE SURVEY RESEARCH

There are three major components to this proposal: first, immediate development of ten-year plan; second, projects affecting remainder of 1972-1973 budget year; third, budget proposals for 1973-1974.

I. DEVELOPMENT OF TEN-YEAR PLAN

It is imperative in the development of the ten-year plan that the personnel resources of the NEA be completely committed to the effort. Not only must a cross section of NEA departments, board, officers, and NSL* staff be mobilized, but also a cross fertilization of these groups is necessary for developing the most broad and comprehensive programs in each area defined under the ten-year overview proposal. We are proposing a structure and timetable to design the programs.

A. Planning Group

Comprised of officers, board members, department heads, and consultants, this group will have overall authority and responsibility for the project. All groups will report to the planning group which will appoint a project coordinator to serve as liaison with the various groups.

There will be three basic study groups charged with the development of systems and programs for their respective areas. Each group would consist of officers, board members, department heads, NSL staff. Some would be individuals whose concern lies in those specific substantive areas. However, to enrich the development there would be a cross fertilization with individuals involved whose concerns are not directly with those specific areas. MRA, CSR, and other needed consultants would work with each group. Within each group would be study teams to work on

* National, State, Local

specific projects and programs. Each of the three groups would be responsible for the formulation and recommendation of plans, projects and programs for each area.

The three groups would be:

B. Research Group

- To undertake a comprehensive study of the entire research area;
- To devise an effective system for the collection and usage of various kinds of data;
- To formulate plans for a national data bank and an operating research capability;
- To recommend structure, budget, and projects in the research area.

C. Political and Educational Action Group

- To plan the structure and implementation of a political action force and an educational action force along the outline of the overview ten-year program;
- To recommend the structure, budget, programs, and specific projects of the action forces;
- To consider and recommend the structure of the entire media and public relations program for the NEA.

D. Resources and Evaluation Group

- To undertake a comprehensive review of the entire resource and financial structure of the NEA;
- To devise and recommend a structure for resource allocation and acquisition dealing with the points raised in the ten-year overview proposal particularly in relation to budget design as regards a coherent political and educational action effort;

- To devise the systems for on-going and full evaluation of goals, programs, projects, departments, and personnel in the NEA particularly as regards budget allocations.

Within each of the three groups there will be a 1973 action study team and a 1974 action study team to immediately recommend activities and projects in relation to the political budget allocation for the current year and the "off-political" year. They will work within the on-going framework of the groups. These study teams will also comprise, in part, an overall 1973-1974 action study group reporting to the planning group.

The following is the initial timetable for the project.

TIMETABLE - DEADLINES

February 1, 1973 - August 31, 1973

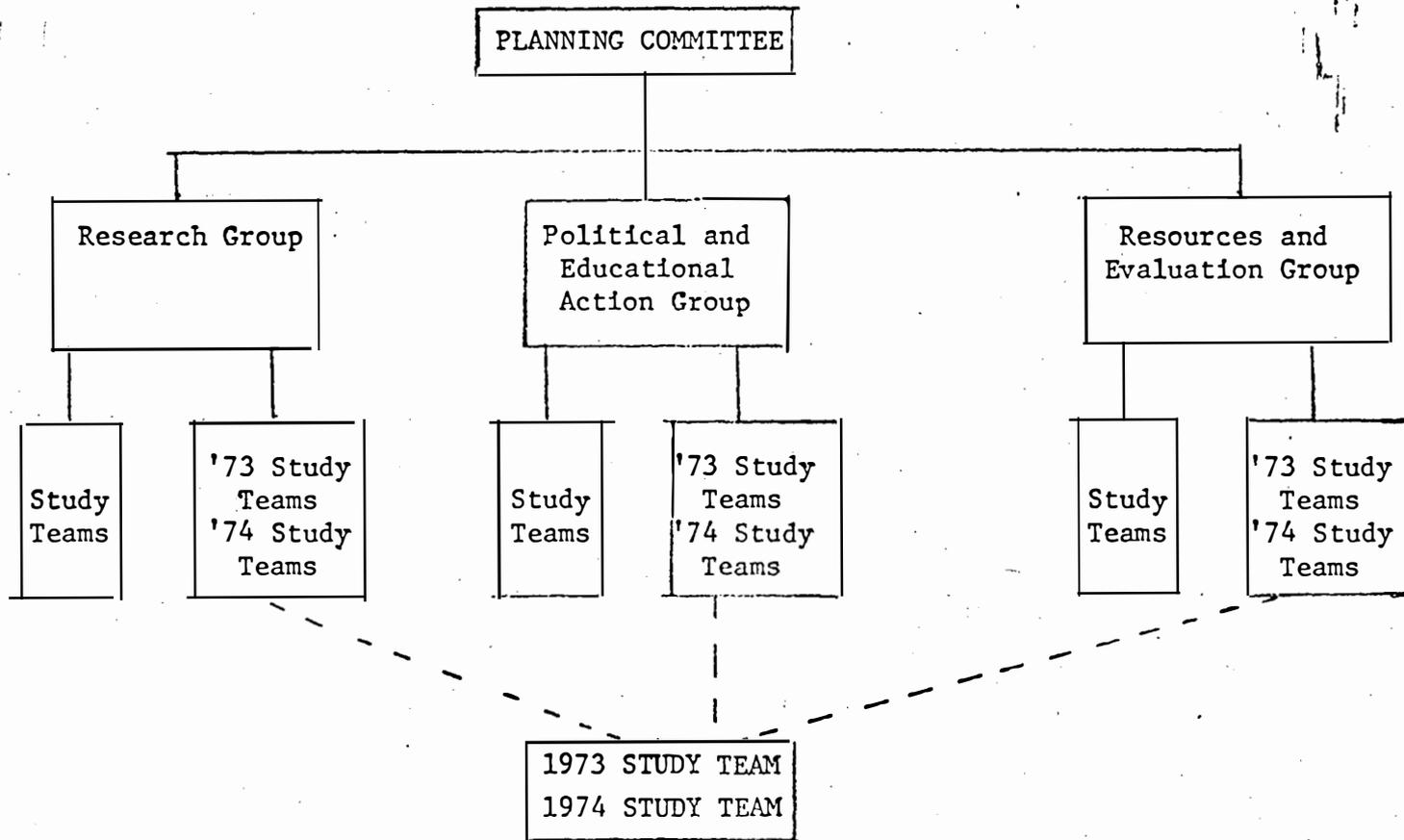
February 20	First meeting of the planning committee; establish three groups
Week of February 26 - March 2	Meeting of each of the three groups
March 27	Establishment of operating procedures and organization of study teams including such elements as liaison, staff needs, resource need recommendations, reports to measure progress
April 3	Report of groups to planning committee
May 8	Periodic meetings of groups and study teams according to standard operating procedure; full interim report from study teams to groups
May 15	Report for 1973 plan
June 12	Final report of study teams to groups
July 24	Final report of groups to planning committee

After September 1, 1973

September 11, 1973	Interim report for 1974 plan
January 15, 1974	Final report for 1974 plan
February 19, 1974	Interim report for 10 year plan
March 14, 1975	Final report for 10 year plan

ORGANIZATION

February 1, 1973 - August 31, 1973



II. PROPOSAL FOR FEBRUARY 1, 1973 - AUGUST 31, 1973 PERIOD

During this twilight period there are several projects that ought to be undertaken.

A. National Survey of Teachers

It is important for the NEA to assess the attitudes of members and non-members toward both educational issues and internal organization issues. This also involves looking at attitudes in and toward the AFT and other organizations. It is also important to do in-depth research and analysis that will help the NEA to develop levers, arguments, and policies to influence members in directions the NEA leadership feel are important.

Over the last year CSR has accumulated a great deal of information regarding general attitudes in the country toward both political and social issues. In order to ascertain in which direction research should go for this particular area -- and to determine the standing the NEA has along with potential problems in the teaching profession -- we propose an in-depth study of American teachers. We would look at such things as attitudes toward teaching, toward unions and associations, toward political and social issues, and also try to measure general attitudes of political, personal and professional alienation.

Such a survey would also provide us with a benchmark for comparing the attitudes of teachers to the general American population. If a large study were undertaken, it would be possible in six months or a year to

do a reinterview of the original sample to determine how attitudes are changing; this could even be focused in areas in which NEA is working to measure the impact of NEA programs. In order to provide sufficient interviews for a panelback and also for extensive demographic and geographic breakdowns, we would recommend a survey of about 2,000 teachers. This would provide a detailed start for the data bank. With a cost of about \$30/interview this would mean a total cost of \$60,000.

B. Computer Conversion

A beginning should be undertaken to adapt the NEA computer to the task of complex political analysis and data manipulation. For example, this would mean installing the flexible computer language designed for social and political research that CSR uses. This will be the first step in setting up a truly flexible and versatile national data bank. As a project there would be hardware costs for drivers, disks, the language, as well as set-up cost. Total cost should be between \$10,000 and \$15,000.

C. Crisis Situation

It is often difficult to know in advance where or when crisis or serious negotiating struggles are going to occur. However, should the opportunities arise, research should be undertaken immediately to study the attitude dynamics during these crises. Such projects could provide a stimulus for the research in other areas and a foundation for dealing with other crises. These are unique and invaluable opportunities to gather critical data, especially for the Bank. In planning for crisis

situations it might be wise to think in terms of 500 general population and 300 teacher interviews for a crisis survey. The cost would be \$15,000 a survey.

D. Pilot New Jersey Project

It is our belief that the opportunity to be involved in an election for a laboratory study should not be passed. We feel that an effort could be undertaken in perhaps two counties in the New Jersey gubernatorial race. The effect and impact of that effort could be evaluated afterwards. In addition survey research involving a regular survey and a panelback in controlled and uncontrolled counties could measure the impact of efforts and techniques on voting behavior and responsiveness.

For this period we estimate cost at \$17,000; ~~\$12,000~~ for the survey by CSR and \$5,000 for general political preparation by MRA.

III. SEPTEMBER 1, 1973 - JANUARY 31, 1975

Until the preliminary project work on the '73 and '74 action group is completed it becomes extremely difficult to make specific program or projection recommendations. At this point, however, we take the opportunity to offer a laundry list of specific services and approximate costs.

CSR

1. Political Field Surveys

500 to 1,000 interviews (avg) for congressional districts and states cost between \$15 and \$20/ interview. Minimum - \$2,500; maximum - \$20,000.

2. Phone Survey - Political

400 to 800 interviews at \$9 to \$11 an interview. Minimum - \$3,600; maximum - \$8,800.

3. Tag-On of 200 Teachers

Subsample to political field survey at \$20 to \$25 per interview. Minimum - \$4,000; maximum - \$5,000.

4. Field Survey of State or Large County Survey of Teachers

600-800 interviews at \$20-\$25 per interview. Minimum - \$12,000; maximum - \$20,000.

mark
1. Targeting

\$5 per precinct with \$2,500 minimum.

2. Campaign Plan Including Systems - about \$10,000.

3. Instant Organization - \$5,000 plus costs

4. Sales Force - \$5,000 - \$10,000 plus costs

COST FOR 1973-1974

\$ 1,000,000 - \$ 1,500,000

Less than \$1.25 to \$1.50 per member.

Ham

**REPORT OF THE SPECIAL
AD HOC COMMITTEE TO DEVELOP AN NEA
PRESIDENTIAL ENDORSEMENT PROCEDURE**

**Representative Assembly
Action Required**

2

**MEMBERS OF THE SPECIAL AD HOC COMMITTEE
TO DEVELOP AN NEA PRESIDENTIAL ENDORSEMENT PROCEDURE**

Joseph Pasteris, *Chairperson*
Teacher; Past President, Illinois
Education Association
DeKalb Senior High School
DeKalb, Illinois 60115

Alva Beamish
Teacher; Chairperson, NEA
Legislative Committee
Dafer, Michigan 49724

Edwin Betts
Administrator; NEA Director
3332 Seaton Place
Petersburg, Virginia 23803

Vivian Bowser
Teacher; Executive Committee
Member
3215 Charleston
Houston, Texas 77021

Ronald Di Orio
Teacher; President, Rhode Island
Education Association
300 Hennessey Avenue
North Providence, Rhode Island 02911

Devon Ogden
Counselor; NEA-PAC Representative;
State PAC Chairperson
943 South 550 E.
Orem, Utah 84057

Tom Pisa
Teacher; NEA Director
770 Elmwood Avenue
Buffalo, New York 14222

Jack Rowe
Administrator; NEA-PAC Chairperson
3277 North McKee Road
Merced, California 95340

Joseph Westbrook
Administrator; NEA-PAC Representative
2385 Central Avenue
Memphis, Tennessee 38104

Staff Consultants

Morris Andrews
Wisconsin Education Association
Council
222 West Washington Avenue
Madison, Wisconsin 53703

Robert Crumpton
Oregon Education Association
1 Plaza Southwest
6900 S. W. Haines Road
Tigard, Oregon 97223

Robert Margraf
Indiana State Teachers Association
150 West Market Street
Indianapolis, Indiana 46204

George Seidel
Pennsylvania State Education
Association
400 North Third Street
Harrisburg, Pennsylvania 17101

Administrative Liaison
Stanley J. McFarland

Presidential Endorsement Procedure

SUMMARY OF THE PROCEDURE FOR ENDORSEMENT OF A PRESIDENTIAL CANDIDATE

The duly elected delegates to the NEA 1976 Representative Assembly will make the final determination of which (or if a) Presidential candidate is to be endorsed by NEA.

NEA-PAC will conduct the candidate screening process and draw up the official ballot, and may make a recommendation to Representative Assembly delegates prior to balloting. NEA-PAC will develop such operating procedures and guidelines as it requires for participation in the NEA Presidential endorsement process.

National, state, and local organization channels and resources will be used to provide members with information related to the endorsement process, Presidential candidates, and issues, and to assess member attitudes and opinions.

PROCEDURE FOR REPRESENTATIVE ASSEMBLY BALLOTING

A vote by delegates to the NEA 1976 Representative Assembly will be the deciding factor in endorsement by NEA of a Presidential candidate. The vote will be conducted by mail ballot sent to duly elected delegates within two weeks following the last major political party nominating convention.

Within one week after identification of all major political party nominees, NEA-PAC shall approve an official ballot which shall then be mailed to all duly elected delegates at least three days prior to mailing of the official ballot.

If the official ballot contains three options; (e.g., two candidates and "no endorsement"), a simple majority shall be required for endorsement. If the official ballot contains two options, 58 percent of those voting shall be required for endorsement.

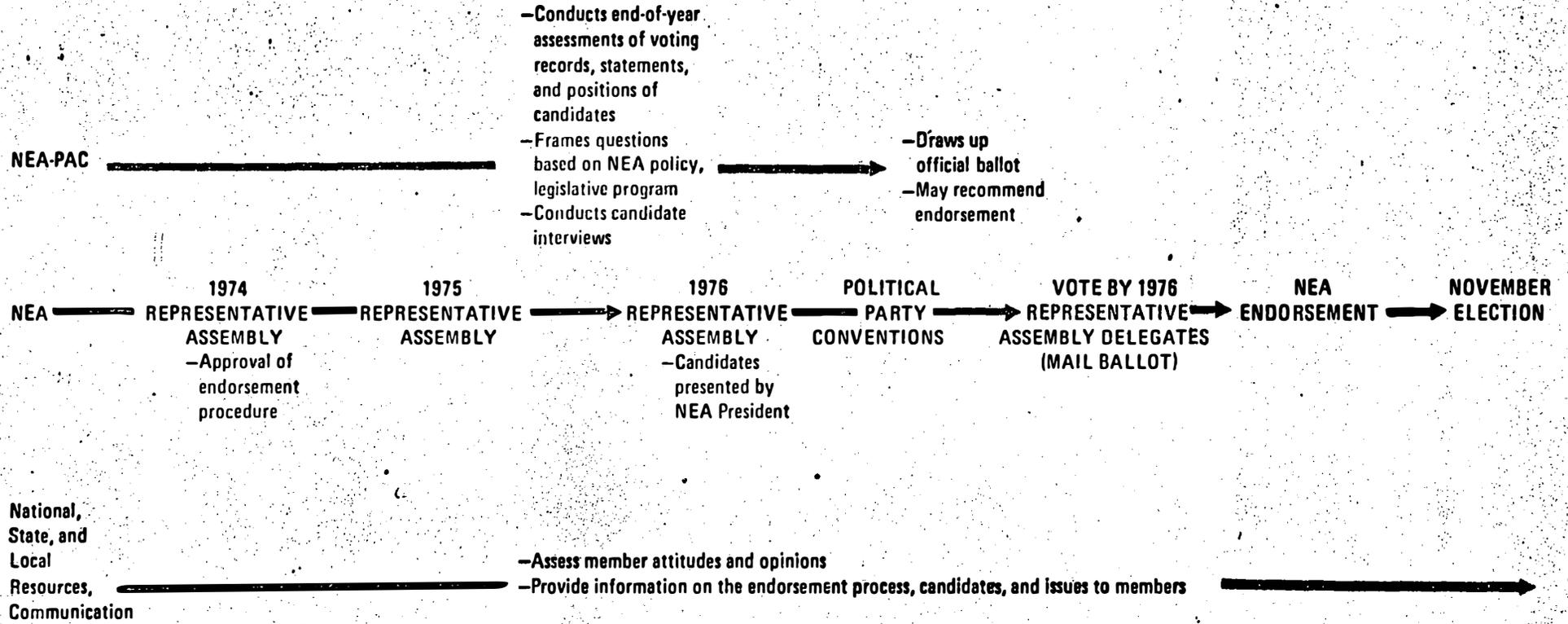
The President of the NEA shall make any announcement of endorsement.

Presidential Endorsement Procedure

SCHEDULE OF ACTIVITIES FOR NEA PRESIDENTIAL ENDORSEMENT PROCEDURE

June 1974	Representative Assembly adopts procedure for Presidential endorsement.
1974-75	Presidential endorsement procedure is explained to members through national, state, and local Association communication channels.
1974-75	NEA-PAC determines procedures it will use in-- <ol style="list-style-type: none">1. Assessing voting records, statements, and positions of candidates, and other political information.2. Framing questions for candidates based on NEA policy and the federal legislative program.3. Conducting candidate interviews.4. Preparing an official ballot to be used by duly elected 1976 Representative Assembly delegates.5. Drafting a recommendation of endorsement which it may make to 1976 Representative Assembly delegates.
June 1975	Representative Assembly receives information on possible candidates and issues. Assessment of delegate attitude may be conducted.
Sept. 1975-June 1976	NEA-PAC conducts political assessments, frames questions, and conducts candidate interviews.
Sept. 1975-June 1976	National, state, and local communication channels are used to provide members with information on issues and candidates. Member attitudes and opinions are assessed through organization channels and surveys.
June 1976	Candidates and information on issues are presented to 1976 Representative Assembly by NEA President.
July-Aug. 1976	Candidates are nominated by major political parties.
Aug.-Sept. 1976 (Within one week of identification of final party nominees)	NEA-PAC draws up an official ballot to be printed and mailed by NEA to all duly elected 1976 Representative Assembly delegates.
Aug.-Sept. 1976 (Within one week of NEA-PAC approval of the official ballot)	Official ballots are mailed to all duly elected Representative Assembly delegates.
Sept. 1976	Ballots are tabulated. NEA President announces decision on endorsement.

FLOW CHART FOR ENDORSEMENT PROCEDURE •



PROPOSAL: A TEN-YEAR OVERVIEW

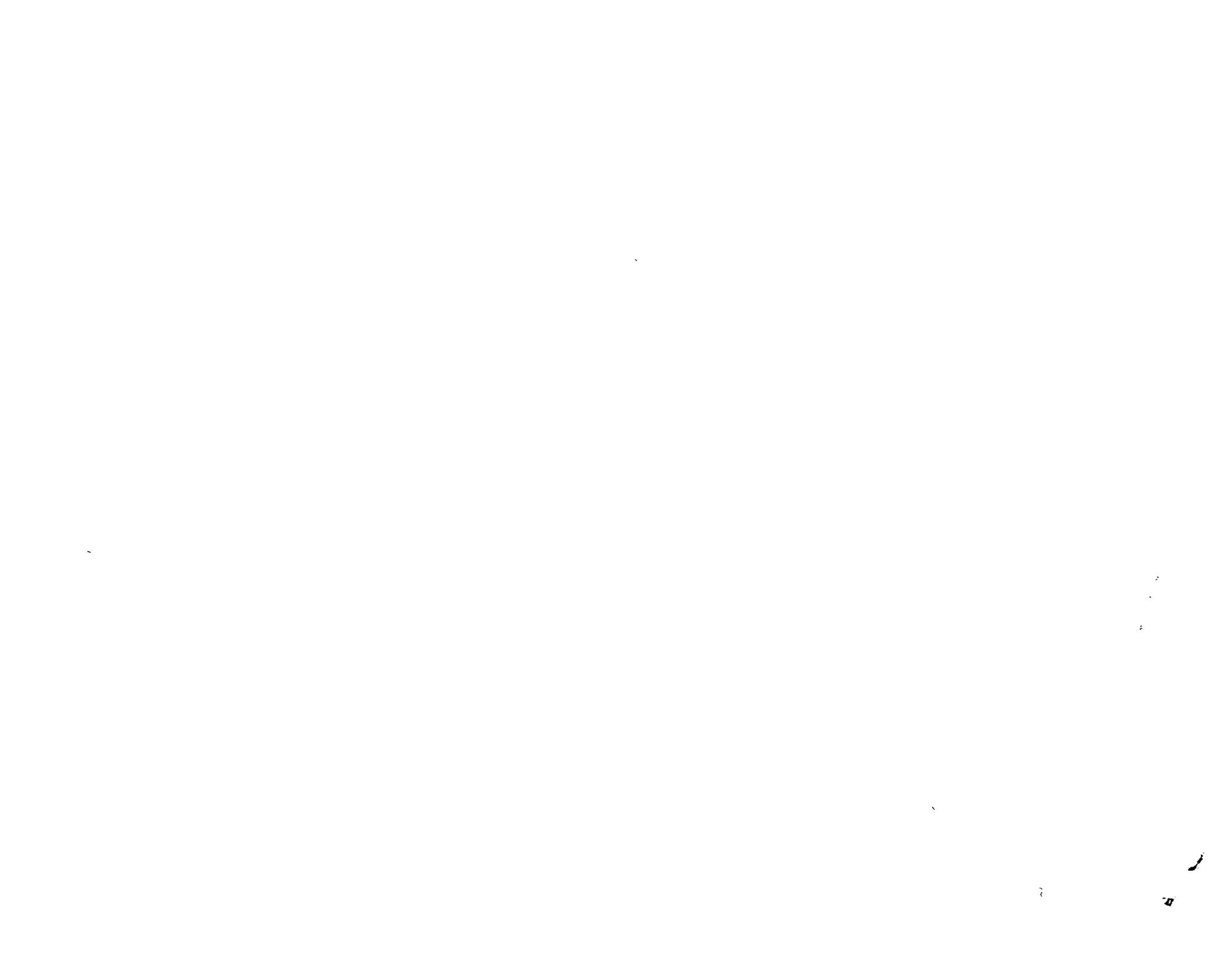
PREPARED FOR

NATIONAL EDUCATION ASSOCIATION

BY

MATT REESE & ASSOCIATES

CAMBRIDGE SURVEY RESEARCH



THIS PROPOSAL IS DESIGNED TO MAKE THE NATIONAL EDUCATION
ASSOCIATION:

1. THE UNDISPUTED LEADER IN THE FIELD OF EDUCATION;
2. A POLITICAL FORCE OF UNPRECEDENTED CAPABILITY;
3. THE MODEL FOR NATIONAL ORGANIZATIONS WHICH DESIRE
TO INFLUENCE PUBLIC POLICY,

IT IS DESIGNED TO PRODUCE:

1. INCREASED MEMBERSHIP WHICH IS AWARE, MOTIVATED, SKILLED
AND LOYAL;
2. A UNIFIED ORGANIZATION AT THE NATIONAL, STATE AND LOCAL
LEVELS, WORKING ACCORDING TO A COHERENT AND RESPONSIVE
PLAN OF ACTION;
3. INCREASED RESOURCES AND POLITICAL CLOUT.

II. RESEARCH

One of the keys to reaching the goals of the ten-year plan will be a coherent, well-structured research operation. Research is not a goal unto itself, but rather a tool for implementing other programs that should lead to the fulfillment of the NEA ten-year plan.

One of the surprising things about major organizations in this country is the degree to which they have failed to use research in a creative fashion. Perhaps one of the major reasons for this failure has been the tendency of researchers to operate in a vacuum. Numbers have been gathered for numbers' sake; data has been piled on data. Research merely for research's sake is nothing but the accumulation of numbers. Only if the structure of the research is to provide information to influence programs will the research have any true value. There is nothing more wasteful than conducting research for research's sake with no structure to tie it to the implementation of programs and thus, in the end, to goals.

The NEA needs to look on research as an intelligence bank which provides information to all levels of the NEA and every type of operation in which the NEA is interested. Research is a commodity which the NEA can develop at state and local organizations which can be used to strengthen ties with those organizations. There are four major areas where research can help the NEA: internal leadership, political leadership, crisis situations and development research.

Within ten years the NEA should have the most comprehensive research arm ever developed by a national organization. This research arm should be functioning to help in the direction of all areas of NEA work. Not only should a variety of certain kinds of information be collected, but there should also be a process for the manipulation and use of that data in projections and evaluations. There should be a capacity in the research arm to do sophisticated kinds of research (on an on-going basis).

There are four major areas to be discussed under research: data that should be collected, the establishment of a national data bank, manipulation and use of data, and an in-house operational research capacity.

A. Data Collection

1. Elections Statistics

Within ten years the NEA should have collected all relevant elections statistics for states, congressional districts, counties and cities or towns that are relevant. This bank of election data down to the precinct level should be put on computers and made easily accessible. There should be a system for constant updating of this area, i.e. the addition and deletion of relevant and irrelevant information.

Very tough, if not impossible

2. Attitude Data

In ten years the NEA should have established one of the largest libraries of political and educational attitudes in the country. Collected over time at the national, state and local

levels, this information should allow for the reading of trends in the political, social and educational fields. Such long-term accumulation of attitudinal data will permit the NEA to measure changes and directions of public thought as it affects their concerns. This data should be computerized in such a way that it allows constant access to certain types of questions over a long period of time, the changing levers and key issues, and access to whole or parts of individual surveys. No one in either the political or governmental sphere has ever really established such a library of information on attitudes that can be retrieved in the way we are suggesting.

3. Demographic Information

General political and census information for national, state and local levels should have been collected during this ten-year period and should be available for easy retrieval at any of those specific levels. The data should be collected, organized and then computerized in such a way that it can be combined, crossed, and indexed by political attitudes, educational attitudes, election statistics, and membership characteristics.

4. Membership Information

Within ten years it is expected that the NEA will have accumulated more detailed information on all of their members. In addition to the normal categories of information collected (occupation, age, length of membership, etc.) member's files should include some record of political activity, contributions (real and potential), and, through the use of attitudinal data,

Right on!

even tougher than I

information on critical lever questions involving politics and education. Such information crossed against general attitudinal data, election data, and educational information will provide a capacity to selectively reach, and hopefully influence, members of the NEA. Such lists should be constantly updated and maintained through computer technology.

5. Incumbents/Candidates

At the national, state and local levels, information should have been collected on the voting records and attitudes of incumbent officeholders as well as potential candidates. This information, collected on a long-run basis, will aid in the evaluation of political involvement and in analyzing past trends of support from people in public office. Such information should be invaluable in charting public officials and in the decision to influence and gather support for certain NEA goals.

1/24/70

Alloy of data

6. Legislatures, Congress and Boards

At all these levels actions taken over a period of time by whole bodies should be collected and computerized. The impact on areas of NEA concern of those actions should also be included. Long term and short term contemplated action by these governmental bodies should be attached to the data. The purpose of this information is to allow the NEA or any of its affiliated organizations, when facing particular proposals or actions in one area, to look at other parts of the country and find out how such actions or such problems were dealt with and their effect on the NEA. With this information it will be

*Computerized
to present campaign
to public*

*Actions
are similar*

possible to decide how to or whether to support the contemplated action, what alternative programs could be suggested and the probable effect of those actions. If such potential actions can be contemplated several years in advance, then NEA can begin long-term planning in terms of influencing the solution to those problems in ways favorable to the NEA.

B. National Data Bank

With the constant collection, updating and computerization of the kinds of information listed above, the NEA will in effect have a national data bank unmatched in the country. It will be critical, however, that not only the data be gathered but that it be systematized and organized in such a fashion that it is retrievable and usable. This process will be a difficult and complex operation but will permit the NEA flexible use of the data which has been collected. The collection of data is only one facet; it's retrievability and flexibility in use is what really makes it valuable.

The data collected must be systematized to provide a realistic and useful national data bank. This means the NEA should be able to pull a candidate's voting records, cross that information with the demographic information on his district, election data on his district, political and educational attitudes of both the public and NEA members in his district, and the location of activists and contributors in his district. Such crossing of information will allow NEA to decide the merits of the candidate, the potential for helping either support or defeat the incumbent, and relevant resources available in that area.

Concise text

C. Use of the Data

With the data collected, the establishment of the data bank and a trained staff, NEA will be in the position to do a number of things.

1. Projections

Consistent with the trend

The NEA research arm should be in a position to make on-going projections based on current and past information in a number of areas. Such projections could be made in the areas of legislative action, census change, political change, changing educational attitudes and membership attitudes, and growth of NEA membership, money and resources. Obviously, if the NEA can deal not only with current and past information but also with future projections, then long term planning in both political and educational areas can take place on a more rational basis. Projections of when negotiating problems will occur, what the elements of the problems will be, solutions to these problems from other areas as well as projections of attitudes and forces which will enter into the problems would be very valuable in planning strategy for negotiations.

2. Evaluation

A research capability should be utilized for the purpose of evaluating all programs. There should be a research effort to evaluate the relative success and impact of legislative and policy activity. Support or lack of support of NEA goals and legislative programs by individual legislators ought to be constantly evaluated on a data basis. The research arm should evaluate in part the

effectiveness and impact of political action undertaken, specific political techniques utilized, and money and resources expended on various efforts. A data evaluation system will provide a constant and updated reading to assist the overall evaluation of NEA projects and programs.

D. Operational Research Capacity

Within the research arm of the NEA there should be within ten years the capacity to do original kinds of research. These should include complex voter analysis, analysis of candidates, analysis of situations, analysis of both political and demographic trends, and analysis of membership lists and groups. There obviously should be a capacity not only to collect the information but also to deal with it in the conceptual sense of manipulation and analysis. There should be a capacity, perhaps with outside consulting, to do on-going surveys of both the public and the members. Within ten years the NEA should be able to fulfill almost any kind of research need internally. Such a capacity, tied to the data collection system and data bank, will give the NEA a research tool unmatched in complexity and comprehensiveness in the political, governmental or economic spheres.

III. POLITICAL ACTION FORCE (PAF)

Within ten years the NEA should have a political action force that is unmatched by any organization or union in the country. Too often groups that have undertaken action in the political arena have failed to do so in a comprehensive and truly effective fashion. What we have outlined for the ten-year plan would permit NEA to exert a greater political influence than any other association or group in the country. Obviously this political effort would not be for its own sake but rather to influence educational policy in the long run. In this sense it ties very closely with the next section which will be the educational action force. The political action force would be one of the programs to use and implement the data from the research arm.

For discussion purposes, there are two major areas of consideration for the political action force: staff responsibility at the national, state and local levels; and political activities by the force which include working with the membership, candidates, allies and at NEA conventions.

A. Staff Responsibilities -- National, State, Local

In creating an effective political action force it will be important to have a national staff actively involved in a number of functional areas. This staff of technicians and professionals would have a number of immediate responsibilities.

1. Evaluation and Selection of Opportunities

One area of responsibility with the help of the research arm would be to evaluate election races and candidates in those races, to select those where the NEA can have the most impact in terms of its goals and influence. It would be an evaluation as well of the money, projections, techniques and programs to be utilized in the political area. Through their evaluation process and that of the research arm, the general NEA decisions can be made in the political area not only in terms of candidates but also the kinds and amounts of resources that should be put into particular races.

2. Identifying Problems

It would be part of the responsibility of the staff to identify problems and problem areas, both current and future. The nature of those problems, their complexity and the strategies to deal with them should be an on-going planning operation for this particular group. This would be an anticipatory as well as a troubleshooting role.

3. Field Operations

Part of the staff responsibility would be for training, consulting, coordinating, and troubleshooting political activities in the field. This would involve national staff, guiding and aiding state and local political action forces in achieving their goals and implementing the decisions and goals of the NEA. The objective here is the creation of an army of political activists throughout the country who are armed with a selection of programs for use in

political action. The servicing and leadership of this army would be a responsibility of the national staff and its field force. Their role with the political action groups would be a combined consultant-leadership role.

4. Coordinating Research

It would be important for the national staff to coordinate in a political sense the collection and use of political research for the political action force. This would mean there would have to be a close working relationship between the staff of the political action force and the research arm of the NEA.

5. Communications

Another staff responsibility would be the area of public relations and communications with the entire structure of the political action force around the country. They would also have responsibility for public relations and communications with the media and political groups outside the NEA.

6. Fund Raising

The final area of responsibility would be in political fund raising. Developing programs to raise money for candidates and for particular projects. Of course, this would be in addition to the money collected in dues by the NEA and would require some sophistication in the techniques of fund raising for political purposes.

B. Political Activities

The reason for developing a national staff capable of operating on a professional level in all of the functional areas mentioned in the previous section is to provide a supply of resources for an active membership and for candidates. These skills must be used to move the membership; then used by the membership to move the voters on behalf of a candidate. In order to utilize these resources, there must be systems for delivering them.

1. Membership (National, State, Local)

The research arm will be generating information about the membership of NEA which will provide levers for moving the membership politically. Thus, it becomes necessary to develop efficient and effective systems of communication so that NEA can utilize these levers. This task starts with list cleaning and culminates with an on-going system of two-way communication by mail and phone. Once this system is functioning and there is the capacity to move the membership on behalf of a candidate, this in itself gives a certain amount of political clout, and then we are ready to begin the next step.

Utilizing this communication and motivation system, we can begin to identify political activists within the membership and also activate new people using our levers. Once identified, they must be trained and equipped with programs which they can use in political action.

The ultimate end of this work is to have throughout the country an army of politically aware and active educators who are trained in the execution of various political campaign techniques and can be easily activated by a stimulus from the top of the chain of command. Thus, some of the skill and competence of the national staff can be spread down to lower and lower levels of the NEA political action force, putting the national and regional staff in a more consultative and guidance role.

2. Candidate Services

The NEA should be in a position to aid candidates whom they are supporting in a variety of ways in addition to working for them. One area will be with financial resources. Through some evaluation process, money should be given to candidates in a way which uses the minimum amount of money to yield maximum impact on races. Part of the problem will be evaluating truly worthwhile situations to provide money. Often there will be little reason to pour large amounts of resources into either assured races or hopeless races. In this area utilization of research information will be important.

At the national, state and local levels the NEA could provide candidates with staff expertise and consulting; using well-trained political operatives who could serve in a sense as consultants to those campaigns. One area of responsibility of that staff would be deciding which of the programs involving NEA membership should be offered to the candidate. These operatives could also gather intelligence to be used in allocating funds.

Another service that could be offered to candidates is research. Public opinion surveys of the general public and NEA membership could be offered. Targeting and targeting tied to polling would be another service possibility. To the extent desirable, this research could be accompanied by campaign plans and systems.

Trained operatives and NEA members to execute specific programs could be offered. This would, obviously, be at a lower level of staff expertise. It would involve people who would be able to run phone banks, do mailings, do canvassing, etc. The major point of this, hopefully, would be that those members provided would be individuals who had been activated politically and who had some training and thus could be more effective.

All of this translates into VOTES whether they be NEA members' votes or votes gathered by NEA workers. These votes and NEA's capacity to deliver them will determine NEA's political impact.

3. Political Alliances

There should be, at some point in the ten years, a program of political alliances with other groups, organizations and unions whose interests parallel those of the NEA. The structure of such an alliance may already have been established. The advantages at that time of a useful alliance would be that there could be a sharing of the resource cost of such an effort. Those resources might include manpower, money, research, etc. However, in ten years it would be hoped that the NEA would have established some alliances with friendly groups, and such a cooperative program should be contemplated.

4. Conventions

There should be in ten years a program for political action at NEA conventions. This is an opportunity to reach thousands of leaders of the NEA at one time of the year, to present plans, and seek ideas and approval. That is an extremely valuable resource for which a coherent program should be designed.

IV. EDUCATIONAL ACTION FORCE

The goal of the NEA is to influence educational policy in America. Political action is only one way in which to do that. It has become evident to us that it will be equally important to the NEA to establish an educational action force parallel to the political action force in concept. The goal of this group will be to deal with membership education, crises, legislation, lobbying, bond issues, education alliances, etc. In a sense political action and educational action are closely intertwined. For example, the ultimate goal of political action is obviously to be able to influence educational policy which involves lobbying. There are a number of areas such as this where educational action and political action merge. Therefore, we thought it important that an educational action force be established.

Specifically, some of the following areas immediately come to mind.

A. Membership Information

Not only is it important to motivate NEA members politically, but it is also important to inform the NEA membership about educational matters and goals. In the same sense it is important to have internal levers and arguments to help move the NEA membership on critical matters and problems in education. No leadership is effective unless it can bring its membership to deal with specific problems. Therefore, the membership must be informed and influenced on educational matters as well as political matters.

B. Lobbying Coordination at the National, State and Local Levels

In a sense this is perhaps one of the most critical areas for the NEA. It is through lobbying efforts in legislatures, school boards, and Congress that educational policy can truly be influenced. There are several kinds of lobbying that will be necessary for coordination. The first will be the traditional kind of lobbying, lobbying on the merits of bills, proposals, and actions, and offering counter-proposals. In general, trying to influence legislators at every level on important educational needs.

There is another lobbying need which is the ability to mobilize teachers to lobby, either in person, through the mail or by telephone in order to exert constituent pressure on members. This is very similar to the Common Cause and the National Rifle Association approach. It is clear that in many cases letters, telegrams and telephone calls do influence legislators. Yet, in order to make it most effective, there must be programs and systems to activate teachers.

A third area of lobbying deals with political clout. This in a sense is a culmination of the political action force. The ability to deal with legislators and public officeholders in the most basic terms that influence them -- their re-election. When all else fails, it is often possible for the NEA to influence public officials by the kinds of political action they can bring to bear on their electoral situations, either in terms of support or opposition. Obviously, only an effective, powerful political force will provide the clout to move recalcitrant and "fence-sitting" legislators.

The final area of lobbying is public relations to communicate the NEA's viewpoint to their membership, to the public, and to the men who ultimately make the policy decisions for governmental units, and at the same time portray the image of the NEA as a powerful political force.

C. Crisis Situations

When faced with impasses, strikes, and serious negotiations, the ability to help influence the public and teacher memberships will be critical in obtaining positive results. In a great sense this will depend on the kind of research that is available about the situation both in terms of substance and of opinion. However, there needs to be a well-defined, active structure to deal in these situations in attempting to move the public, teachers, and ultimately policy in those areas themselves.

D. Research Coordination

There needs to be coordination of educational and legislative research for lobbying and for getting information to the public. In part this will be a liaison and working relationship with the research bank similar to the relationship between the political action force and political research. The use of voting records, legislators' background information, actions taken by various governing bodies, and anticipated situations can be helpful in reaching the educational goals the NEA and its other state and local organizations feel to be important.

E. Bond Issues, Referenda, Et Cetera

It will be a critical function of an Educational Action Force to be able to motivate membership and the public in support of bond issues, tax referenda, school board levies, etc. In a sense it is a job of public selling; a campaign not of electoral politics but of issue politics. Many of the same techniques and programs used for political action can be translated into action for issue elections. The needs here are as great or greater than those of the political action force and, therefore, should receive appropriate emphasis. The NEA could be extremely effective in changing the course of public action on those kinds of questions.

F. Alliances

In ten years the NEA should have established well-defined alliances with groups who share similar interests and needs. For example, the State, County and Municipal Employees Union has many of the same problems as the NEA. The AFT or other educational and teacher groups may still be in existence. There must be some thought given to the structure of alliances in an issue sense as opposed to a political sense. There are groups who could be coordinated in activity on matters of public policy but not on political action. Some care and attention should be given to a program designed to deal with this question. Hopefully, in ten years the NEA should be in a position where it has strong alliances with other groups in which it plays a leading if not a dominant, but certainly not a subservient, role.

G. Convention

Just as it is important to utilize the convention for information and persuasion in political action, it is also critical to use the convention as a forum for educational matters and matters of public policy. The same arguments that applied to the area of political action in the convention apply, perhaps even more, to an educational action force program within a convention.

V. MEDIA AND PUBLIC RELATIONS

In ten years NEA should have developed a comprehensive media and public relations program which complements the programs proposed here. This program should deal both with internal and external media and public relations of NEA. Therefore, for discussion purposes we shall look at this area in terms of internal and external needs.

A. Internal

There are a number of internal needs of the NEA membership which should be serviced. Some of the following are:

1. Information System

There should be a comprehensive information system for the membership. This would allow the NEA to keep in touch and to inform all of its members about its activities, not only in its educational field, but also in the political field. It should provide for information to return from members to the NEA. This two-way communication system will be critical for the NEA leadership.

2. Training

There should be a whole series of training materials including films, prepared and distributed in the field. These

training films would involve political action, educational action and other areas deemed necessary. It would be important to set up a structural area group to prepare and distribute these materials and films.

3. Media Image

A comprehensive study of the image of NEA as perceived by its membership should be undertaken. With the actual and anticipated status of NEA in mind, utilizing research, we can begin to define the messages which must be communicated to the membership so that their perception and the facts draw closer together. Once we have brought the membership up to date, the image problem is only adding new dimensions to members' perceptions as they are added to NEA. The definition of the image is crucial because once defined, we must be consistent or we will weaken the image.

B. External

There are a number of external needs involving the public which must be met by the NEA in terms of media and public relations.

1. Issue Information

It is important in presenting the NEA's position that a structure be established for the mass dissemination of information covering the NEA's positions, attitudes, and their relation to the general public. It is important to inform the public about goals, ideas and programs in light of the public's interest in these matters.

This would require a massive effort both in the delivery system and in designing the message.

2. Communications System

As mentioned before, there must be a comprehensive system involving staff and structure for dissemination of this information. Part of the function in this area will be to design messages that relate to programs and to the information revealed in research. These messages must be composed and disseminated to the general public.

3. Money

There must be an on-going, continual evaluation of the cost effectiveness of paid media. Whether this media be electronic or print, there must be some idea of the effectiveness for the dollars being spent. This is critical because media is an area in which great sums of money can be spent often with no idea of the purpose nor realization of the goal of those media. On-going research serves to monitor this.

4. Free Media

There is a great deal of free media that is available to a group such as the NEA. However, utilizing it effectively is another matter. There are several ingredients to effective use of free media. For example, a program should be developed to determine the amount of free time and the kinds of free time that are available

and to determine how to utilize this time. This includes public service media spots, press conferences, forums, etc. There will be a need to decide the effectiveness of particular free media and its availability. There also must be some goal in mind in terms of what can be accomplished through free media as opposed to paid media. Obviously, the major coordination facet will be the thematic content and continuity of the free media. The thematic content disseminated must be consistent with both the overall desired image to be presented and the information that is to be disseminated. It is crucial that free media not become a forum in which a garbled, distorted or scattered image is projected.

VI. RESOURCES

In ten years the NEA should have developed a fairly sophisticated resource structure in order to make the operational programs successful. There should also be programs to increase the amounts of resources available to the NEA. Again, we will seek to enumerate these without getting into programmatic detail.

A. Check-Off of Political Dues

It is hoped in ten years that the NEA will have established nationally its check-off system of political dues going directly to the NEA. The success of this program will obviously be critical to the success of developing a truly effective political action force.

B. Programs for Fund Raising -- Hard Money

There is no reason the NEA cannot undertake fund raising programs for hard money. An organized effort will immensely increase the revenues available in hard money in ten years. The most obvious programs for raising money would be:

1. Direct mail;
2. Specific fund raising projects;
3. Direct telephone solicitation of contributions;
4. Convention activities for fund raising.

C. Soft Money

There needs to be in ten years a comprehensive structure for the use of soft money to carry the cost of many of the programs. Departments must begin looking at how to manipulate budgets in order to help provide many of the programs with the kind of support (staff, equipment and supplies) that will save the use of actual cash.

D. Rearranged Budget

In ten years it is hoped that the NEA will have been able to restructure its budget so that it can be more effective politically. There is no question that the present budget arrangement, the September to September budget, is impractical for political effectiveness in election years. Some careful thought and redesigning of the budget approach is necessary in order to implement some of the programs outlined.

E. Consultants

There should be some program investigating the possibilities of putting specific and individual consultants and technicians on the NEA payroll as a budgetary procedure.

F. Sharing Costs

If alliances, both in the political and educational public policy areas are established, then the sharing of the cost can take place. One of the obvious advantages for forming alliances is to pool resources. This will involve the budgetary structure in order to gain

the maximum number of resources and the maximum effect for the NEA through its operations with allies. A structure for this kind of operation should be in effect in ten years.

G. Utilizing Total Resources (National, State and Local)

There needs to be a comprehensive program developed in order to utilize and to maximize the resources, financially and otherwise, at the national, state and local levels. Hopefully, by cutting duplications, by providing services back down and up the line, all the resources available at three levels can be maximized, thus effectively expanding the budget of the NEA. This perhaps is easier said than accomplished. This will involve a need for totally evaluating all the resources available and composing a budgetary structure to utilize those resources at all levels of the NEA.

VII. EVALUATION

In covering all the areas (programs, finances, research, etc.) there is a tremendous need for an evaluation process. Obviously, there must be an evaluation process within each area. In addition, there needs to be an overall evaluation system for all the functions of the NEA. That would require evaluating whole areas and programs vis a vis other areas and programs, and also making decisions on specific programs especially as they relate to budgeting. The NEA must avoid simply launching a number of programs that become ineffective, bureaucratized and merely self-serving. The purpose is to avoid perpetual operations that become ingrained and ineffective.

The mechanism for overall evaluation and the responsibility for this process must be comprehensive and well established. These evaluations must be on a regular basis with enough frequency to permit quick shifts in emphasis and direction for programs and departments in the entire NEA. This is the absolute key to flexibility and thus to overall effectiveness.