



NATIONAL EDUCATION ASSOCIATION

AUG 29 1996

7. 43-0042

Keith Genger, President
Robert Chase, Vice President
Marilyn Monahan, Secretary-Treasurer
Don Cameron, Executive Director

111 Anza Boulevard, Suite 350
Burlingame, California 94010
(415) 347-6000 Fax (415) 347-8983
PACIFIC REGIONAL OFFICE
Nelson S. Okino, Regional Director

August 26, 1996

Memorandum

TO: Don Cameron, NEA Executive Director
FROM: Nelson S. Okino, Regional Director *Nelson S. Okino*
RE: Request from Washington for NEA Financial Assistance

BACKGROUND

In September 1995, the Washington Education Association (WEA) submitted a request to the NEA for \$315,000 in financial assistance to affirmatively address a number of legislative issues in the state of Washington. One was the Property Takings Referendum 48, which the WEA was able to defeat in November 1995. The WEA also anticipated the possibility of five other ballot initiatives qualifying for the November 1996 general election. The five were 1) Vouchers; 2) "Independent Public Schools (Charter Schools)"; 3) Repeal of Affirmative Action Laws; 4) "Equal Rights, Not Special Rights"; and 5) Restrictions on Adoption, Except for Those in Married, Male-Female Households. In anticipation of 1996 initiative activities, the WEA expended over \$100,000 in direct costs from the 1995-96 budget through program adjustments. This included a commitment of portions of \$1.4 million from the WEA Reserve Fund and a portion of \$300,000 in WEA-PAC funds.

As a result of the September 1995 request, the NEA GR-West Team Manager and I met with the WEA on October 6, 1995 to review the request. After considerable discussion, agreement was reached that the NEA would contribute \$7,000 to the WEA's contemplated \$37,000 expenditure to defeat Referendum 48. The WEA also agreed to tighten its internal communications circuit to include the NEA GR-West Team in the planning and monitoring of contemplated initiative activities.

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It was further agreed that the WEA would continue to prepare for the possibility of one or more of the contemplated initiatives qualifying for the November 1996 ballot and that at an appropriate time, the NEA could expect to receive another request for funding assistance. (The NEA was reluctant to make any additional commitments to funding assistance in the Fall of 1995 because there were still too many unknowns which could impact the level of funding needed by the WEA, i.e., the number of initiative(s) qualifying; the strategy, plans, and activities which would be needed, etc.)

WEA APRIL 4, 1996 REQUEST

On April 4, 1996, the WEA submitted another request for financial assistance from the NEA (See Attached.) in the amount of \$400,000. (NOTE: The WEA request included an additional request for funding, but the WEA, NEA GR-West, and the Regional Office agreed that consideration of the additional request would be held in abeyance as the parties continue to discuss and clarify funding options.) The request for \$400,000 was predicated on two ballot initiatives, both opposed by the WEA, qualifying for the November 1996 election. One of the ballot measures was Initiative 173, which, if passed, would have the State of Washington pay scholarship vouchers for primary and secondary students to attend private or public schools of their choice. Students would receive "scholarships" equal to at least 55% of state and local per-pupil funds, redeemable at any school that enrolled at least 25 students. Schools redeeming vouchers could not require its teachers to have college degrees, as long as the teachers passed a subject matter competency test. In addition, the initiative would leave it up to the Legislature to decide how schools would deal with issues of tenure and collective bargaining

The other ballot measure was Initiative 177, which would allow for the creation of Independent Public or Charter schools. If passed, each public school district would have to place a ballot measure before the voters that would authorize creation of a Reformed Public School District. Districts that did not opt for "reform" would have to place the issue before the voters at every future levy or bond election. If the voters chose to become a Reformed District, every school within the district would become a "school of choice" and parents could select any school within their own district or neighboring districts for their children. Reformed Districts would allow for the creation of Independent Public Schools established through a petition process by parents and/or teachers. Once established, the Independent School would become a non-profit corporation governed by its own board. Independent Schools would be freed from many state regulations, including performance based education requirements. Employees of an Independent School could retain the right to bargain collectively with the governing board of the corporation, but would be excluded from coverage of a Master Agreement with the Reformed School District.

NEA GR-WEST SPRING, 1996 ASSESSMENT

After receipt of the April 4 request, the NEA GR-West staff team conducted an assessment and provided the WEA with a written response on April 9, 1996. (See Attached.) In the response, the team found that the WEA had developed a comprehensive plan to oppose the two initiatives. It also

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concluded that 1) Research indicated a clear opportunity to defeat both initiatives; 2) The WEA was prepared to make a minimum commitment of \$700,000, with a maximum in excess of \$1 million; and 3) There was united opposition among the state's education community and initial support from a broader coalition to defeat the initiatives. However, the GR-West Team also believed that there was insufficient data at the time to determine the level at which the proponents would engage in the initiative campaign. Therefore, it was difficult to determine if the proposed plan and budget were appropriate for the campaign which was deemed necessary. The GR West Team also recommended that \$150,000 be allocated to the WEA from the NEA Ballot Initiative Fund and that the WEA resubmit its request for the remainder of the funds in mid-August when more data would be available on the proponents' campaign plans and efforts.

As a result of the GR West Team recommendation, the WEA informed the NEA on April 25, 1996 (See Attached.) that it would "accept the \$150,000 previously allocated by NEA GR, participate in a later joint assessment of the initiative crisis in Washington and determine, at that time, the level of request for additional support from NEA." The WEA also indicated that it saw "no benefit in having the Executive Committee consider a request for additional financial assistance" at that time.

NEA GR WEST AUGUST, 1996 FOLLOW UP ASSESSMENT

NEA GR West conducted a follow up assessment (See Attached.) in mid-August and concluded that:

1. Ron Taber, the Far Right sponsor of the I-173 Voucher initiative will most likely emerge from the September primary as one of the two candidates for the office of state Superintendent of Public Instruction. As a multi-millionaire candidate, he has made the Voucher initiative the centerpiece of his campaign and is expected to fund his campaign at whatever level is necessary to be successful.
2. A significant percentage of potential voters opposed to I-173 in February, 1996 had moved into the "Undecided" category by June, 1996, while support for the Voucher initiative had remained relatively constant over the same period.
3. Prior to his selection as the GOP Vice Presidential nominee, Jack Kemp had campaigned for I-177, the Independent Schools initiative and there is the possibility that this education concept may become an important part of the national presidential campaign.
4. Like I-173, a significant percentage of potential voters opposed to I-177 in February, 1996 had moved into the "Undecided" category by July, 1996, while support for the Independent Schools initiative had gained slightly over the same period.
5. The sponsors of the Independent Schools initiative have reported pledges of \$250,000, with an additional \$400,000 available for the campaign.

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6. Previous internal organizational challenges to both campaigns have been addressed by the WEA to the satisfaction of the NEA. ~~A strong working relationship has now been established between the Washington State Coordinated Campaign and the "No on I-173 and I-177" campaigns.~~
7. The NEA GR West recommends that the additional \$250,000 previously requested be sought from the NEA Contingency Fund.

RECOMMENDATION

In light of the history of this request and consistent with the NEA GR-West Team's recommendation, I strongly recommend that \$250,000 be allocated from the NEA Contingency Fund.

NSO/dv

Attachments

- cc: Evelyn Temple, NEA Assistant Executive Director
Larry Diebold, NEA Assistant Executive Director
Carmen Quesada, NEA GR-West Manager
Peter Arum, NEA Organizational Specialist
Eric Wilson, NEA Organizational Specialist
C.T. Purdom, WEA President
Jim Seibert, WEA Executive Director
Bruce Colwell, NEA Director
Tom E. Morris, NEA Director
Jack A. Nelson, NEA Director
Christine N. Turner, NEA Director
Jeanette J. Marquardt, NEA At-Large Director