



*New for
Election 2018*

MIEA-PAC

Candidate Screening and Recommendation Handbook

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* These forms must be returned within three days following the S & R meeting to:
MEA Public Affairs, Michigan Education Association, PO Box 2573, East Lansing, MI 48826-2573, or via
email to pac@mea.org.

The Screening and Recommendation Process

The screening and recommendation process followed by MEA-PAC is one of the most sophisticated, grassroots procedures of any PAC in the nation. The MEA-PAC Screening and Recommendation (S & R) process will involve hundreds of members from across the state in back-home interviews and S & R meetings. Our procedures have been replicated by both private and public sector PACs.

- MEA-PAC's S & R process is part of the MEA's ongoing advocacy for children, public education and public education employees.
- All screening and recommendation procedures are guided by MEA-PAC policies, which are adopted and implemented by the MEA-PAC Council, the MEA Board of Directors and the MEA Representative Assembly.
- MEA-PAC S & R committees are composed of MEA, ESP, MAHE and MEA-Retired members in good standing who contribute to MEA-PAC, who are registered to vote, and who either reside or are employed in the legislative jurisdiction being screened. S & R committees for Legislative and Congressional races are usually 5 to 11 persons who are representatives of the MEA units in the jurisdiction and familiar with the incumbent. Preferably there is continuity from S & R committees that continues on into Legislative Council meetings with lawmakers after the election (and cycles back around to the subsequent S & R the next election cycle, and so on).
- While not required, it is recommended that members of S & R committees be residents of the respective legislative district.
- Members of an S & R committee shall not be actively committed or made a reportable contribution to any candidate's campaign for office being considered nor shall they be candidates for elected office other than precinct delegate.
- All members of S & R committees shall be MEA or MEA-Retired members in good standing and current contributors to MEA-PAC.
- MEA can and does make recommendations in primary elections. However, to ensure consideration of all relevant dynamics, please contact the HQ legislative/political staff person assigned to the district (800-292-1934 x5508) prior to making the decision to conduct a recommendation in an open primary.
- All recommendations are decided by the local S & R committee.

The S & R Process In Brief

1. A list of legislative districts naming all coordinating councils within that district will be published by the MEA-PAC Chairperson.
2. The list will designate a local UniServ staff person responsible for coordinating the S & R and a headquarters legislative/political staff member to provide assistance and input.

3. The designated UniServ staff person shall call a meeting of the S & R committee of the eligible PAC(s) in coordination with the designated legislative/political staff member and local coordinating council PAC(s).
4. All eligible coordinating councils shall be invited to participate and all participating shall have equal representation in the recommendation process.
5. That meeting shall be used to determine whether to hold a screening and, if a screening is to be held, when and where to hold it. This initial meeting may be held electronically by email, by teleconference, or in person.
6. If a determination is made to hold a screening, the designated UniServ staff person and designated headquarters legislative/political staff member shall coordinate setting up the screening meeting. Unless otherwise approved by the MEA-PAC Chairperson, state and local screenings must be held after the candidate filing deadline of 4:00 pm, April 24, 2018 and preferably before the end of the school year. For congressional screenings, please contact our political organizer Jessica Lumbreras at jlumbreras@mea.org regarding NEA timelines for these federal races. All known eligible candidates for the legislative position must be invited.
7. On or before the day of the S & R, the designated UniServ staff member and/or the designated headquarters legislative/political staff member shall provide the committee members with a training which will cover the MEA-PAC policies and the criteria on which recommendations are made.

Organizing the Committee

Each S & R committee shall:

- Elect a chairperson to serve at each meeting.
- Discuss as part of the S & R process the political demographics of the district and an analysis from the assigned legislative/political staff member.
- Ensure that, except in continuing endorsements, all eligible candidates from the major parties are invited for an interview. Any limitations on eligibility of candidates to participate shall be made by the MEA-PAC chairperson, with the consent of the Governing Board. Any challenges to such limitations shall be decided by the Governing Board within forty-five (45) days of the challenge being filed with the chairperson.

Types of Recommendation

Regular recommendation:

A regular recommendation is granted to a candidate in an open seat, or an incumbent not previously recommended, based on S & R meetings with all major candidates for the seat. During the course of a two or four year legislative session, a legislator who was not supported in the previous election may nonetheless turn out to be supportive of MEA issues. If his or her voting record and cooperation indicates such, MEA Headquarters may recommend that the incumbent be supported. The S & R committee nevertheless interviews all candidates seeking our support and arrives at an independent decision regarding whether to recommend or not recommend any candidate.

Continuing Recommendation:

- a. Criteria for determination of continuing recommendation by S & R committees shall be the voting record of the incumbent, lobbyists' assessment as to his/her legislative deportment on issues of concern to MEA not discernible in voting record, and back-home assessment. Determination of an incumbent's eligibility for continuing recommendation status shall be made by the MEA-PAC Chairperson with the consent of the Governing Board. Any challenges to such determinations shall be decided by the Governing Board within forty-five (45) days of the challenge being filed with the chairperson. Continued recommendation for a local elected official shall be determined by the local S & R committee.
- b. Where continuing recommendation eligibility has been determined, the S & R committees shall waive the screening of other candidates seeking our recommendation to those seats and only interview the eligible incumbent.
- c. If an incumbent is eligible for a continuing recommendation and one is not granted (for the same office) by the S & R committee, no other candidates shall be considered in that election cycle unless an appeal is granted by the Appeals Committee.

Replacement Recommendation:

Replacement occurs where the incumbent lawmaker is openly hostile to MEA legislative goals and there exists a reasonable opportunity for a candidate to defeat the incumbent. Experience shows that a very high percentage of incumbents seeking re-election are successful. Because of this, it is a waste of time and money to become involved in too many replacement efforts. Our resources must be targeted toward supporting replacements only where there is a high probability of success. We must also consider the potential that an unsuccessful attempt to replace an incumbent may convert benign relationship to an adversarial relationship. ***We cannot stress enough the importance of making a careful analysis in concert with your assigned HQ legislative/political staffer. Our resources in time and voluntary contributions cannot be wasted on replacement efforts unless there is a strong likelihood of success.***

Types of Races

Open seat – No incumbent running. In the seats where no incumbent is running, party voting patterns play a major role in assessing the viability of a candidate. Voters in some legislative districts lean heavily toward one party, making the district a safe Democratic or a safe Republican seat. Before any meetings with candidates in such districts, the committee needs to carefully assess whether any candidate of the party in control of that district is likely to be friendly to MEA concerns. If there is no such person, the committee should choose not to interview any candidate, leaving members free to exercise their personal party preferences. All major candidates must be invited to participate in the S & R process.

Safe seat – Where party-based support, either Democrat or Republican, is so strong that a certain party carries the seat. Conventional wisdom would suggest that any seat that has a party base outside the margins of 45% to 55% is considered safe.

Competitive seat – Within the party base margins of 45% to 55%, either party can win given a solid campaign.

Considerations for the S & R Committee

S & R committees consider the following:

- **Demographics of the district:** Contact your assigned legislative/political staff person at headquarters in East Lansing by phoning 800-292-1934 x5508. He or she will be able to provide information on how others (e.g., state party staff, state organizations that are politically active, other legislators) are assessing that seat. He/she can also provide statistical data on the type of voter in that district (e.g., strong Republican, strong Democratic, persuadable). Political campaign consultants, lobbyists and UniServ directors are available to meet with your committee and to assist with an analysis of each candidate's probability for success.
- **Voting record (incumbent):** Contact your assigned legislative/political staff person at headquarters in East Lansing by phoning 800-292-1934 x5508. They will work with MEA lobbyists, who track legislative votes on key bills throughout and across legislative sessions.
- **Ability to Win:** Assess whether the seat is safe or competitive. Who are the candidates? Is this an attempt to win a primary election or are we trying to change the party holding the seat?
- **Campaign organization:** Assess chances of candidates using the following factors:
 - a. **Name recognition:** Is very important to a candidate. Given enough time and money, this can often be developed.
 - b. **Time available:** Is there sufficient time to develop and implement the strategies necessary to win the campaign?

- c. **Money:** Are sufficient funds available early enough to mount an effective campaign? Is the candidate a good fundraiser?
- d. **Supportive organization:** What organizations or influential people have been or can be obtained by the candidate?
- e. **MEA readiness:** Can we activate MEA volunteers in large numbers to work in the campaign? Are our members registered to vote? Will our members vote? Will our members support our recommended candidate?
- f. **Candidate:** Does the candidate make a good impression? Is the candidate viewed as an independent (usually a plus) or is he/she associated with special interest group (usually a negative)?
- g. **Campaign organization:** Is an office set up? Does the candidate have a good campaign manager? Are various aspects of the campaign well organized (media, targeting, finance, etc.)?
- h. **Polling:** Is a poll available? What does it say about name recognition, issues, support for the incumbent, support for the challenger and other concerns?

Organizing and Conducting the Interview

Identify and secure an appropriate site that is comfortable, accessible, has parking available, and an area for candidates to wait if they arrive early, and refreshments. Remember that you are representing your PAC and also MEA. **Do not conduct screening and recommendation interviews in a school building as that constitutes using public resources for political purposes.**

- Send letter to candidates inviting them to an interview appointment (see Appendix VI).
- Arrange for someone to meet arriving candidates and make them comfortable while waiting for their interview. (This is usually done at pre-interview committee meeting.)
- Set up a time schedule and stick to it. Start on time and end on time or earlier (See Appendix V).
- One hour per interview is suggested. Leave time at the beginning to review candidate questionnaire responses and at the end to review key questions and answers.
- Agree on who will chair the interview and who will ask each question. All candidates should be asked the same basic questions.

- Be sure to introduce the candidate to the committee members, including the local they represent.
- The following procedure is suggested: invite the candidates to make an opening statement. Conduct a question-and-answer period. Then end the interview by giving the candidate an opportunity for a closing statement.
- Before the interview is concluded, let the candidate know when to expect a decision from the committee and how that decision will be communicated.

Deciding Whether to Recommend

IMPORTANT: Do not recommend a candidate just because he/she is likely to win the election. This gains us nothing and we will have put time and money into supporting a candidate who may not support our concerns.

Recommendation is by majority vote of the committee and becomes the recommendation of MEA-PAC upon filing the appropriate forms with MEA legislative/political staff. ***Only one candidate can be recommended for each office.***

To receive a recommendation, a candidate should be solidly in support of issues that are important to MEA.

The questionnaire to be used for Election 2018 is found in Appendix I. This questionnaire should be sent to the candidate in advance of the interview, along with a request that the candidate return the completed form prior to the interview. At the interview, candidates should be quizzed in greater depth on these issues, using the interview questions as your guide. (See Appendix VIII)

Remember that any candidate will hold some views that differ from MEA/NEA positions. However, to receive our recommendation, the candidate must be unequivocally supportive of MEA/NEA goals and positions on the major issues of concern.

After the Recommendation

Major Responsibilities of S & R Committee after the Recommendation

File Forms

The following forms must be on file with MEA within three days after the S & R before a recommendation, including a financial contribution from MEA-PAC, can be processed:

1. ***Candidate Questionnaire*** (See Appendix I)

A copy of the candidate's reply to the official questionnaire is kept on file at MEA for future reference – particularly when it comes to lobbying activities.

2. **S & R Committee Form** (See Appendix II)

The form includes the legislative district number and S & R committee members by classification (teacher/ESP/retired/higher education).

3. **Candidate Recommendation Form** (See Appendix III)

This is your official notification to MEA of the recommendation and includes your plans for follow-up activities.

4. **Candidate Profile Form** (See Appendix IV)

The profile includes candidate data that may be needed for internal communications and for campaign statements, including photographs, to be submitted electronically to PAC@mea.org.

Notify candidates of the recommendation decision

Candidates who took part in the interview process should be notified promptly of the S & R committee's decision. Sample letters are available for granting the recommendation (Appendix IX) and rejections (Appendix X).

Publicize recommendation to members

Members need to be made aware of the S & R committee's decisions so they can begin to learn more about the recommended candidate. Letters, postcards, emails, newsletters or other members-only communication vehicles can be used for this purpose. The message should be drafted so that it shares the reason why the S & R made its decision and outlining the major issues at play in the election. In competitive races, multiple communications may be sent out from MEA Headquarters about the race – work with your assigned MEA legislative/political staff member on a plan.

Deliver MEA-PAC's Contribution to the Committee

All contributions to candidates for state level office are made by MEA-PAC. Coordinating council PACs cannot make direct contributions to a state level candidate; contributions must be sent to MEA-PAC for processing. The amount of the contribution is dependent on a series of factors including the difficulty of the particular race, the importance of the position and other relevant criteria.

On the recommendation form (Appendix III), coordinating council PAC(s) indicate how much from their council PAC funds should be contributed to a candidate, as well as requesting a supplemental contribution made by MEA-PAC to the candidate's committee. Such supplemental contributions (including "matching funds") are subject to the MEA-PAC budget, availability of state-level funds and campaign finance contribution limits, and will be processed only upon MEA's receipt of your committee's written authorizations.

On receipt of all forms from the S&R committee and request for PAC funds, MEA will prepare a check from MEA-PAC payable to the candidate's committee. This check is usually mailed to the S&R committee's assigned lead UniServ Director, so that the committee or its designee can personally deliver the contribution to the candidate. You may wish to take photographs of this ceremony for use in local newsletters or other publications.

Meet with the Campaign Staff

Work with the candidate and his or her campaign staff to determine how best to assist the campaign. Often the campaign is served best by arranging for a group of volunteers to take over specific portions of the total effort – such as phone banking or fundraising. We strongly urge an ongoing tie to the campaign, including placing MEA volunteers in key campaign posts. MEA members are effective in virtually all aspects of political campaigns, and campaign involvement is a key first step in maintaining a long-term positive relationship after the election.

Generate Volunteer Workers

Volunteers are the backbone of every political campaign. Here are some “rules” to follow for recruiting and retaining volunteers.

1. Identify potential volunteers. Use lists of prior volunteers (available on the VAN) as a place to begin recruiting efforts. Be sure to put lists of who helps into the VAN to help future recruiting efforts.
2. Ask in person (not only via email) in a positive way (e.g., “Can you work on our phone bank next Tuesday from 7 to 9?” Not: “You wouldn’t be free next Tuesday, would you?”).
3. Be organized. If there is a lack of organization, your volunteers won’t come back – and you won’t get the maximum utilization of their talents while they are there.
4. Have clearly defined tasks for the volunteers.
5. Provide training – explain the importance of their activity to the total campaign.
6. Have a kit available with explanatory information and the materials/equipment needed to do the job (e.g., phone list, script and Q & A).
7. Greet volunteers – make them feel welcome.
8. Thank volunteers – do something nice for them. Have the candidate there to greet them if possible. Provide refreshments.
9. Invite them to the victory party.
10. Ask them to volunteer again.....and to bring a friend.

Turn Out “Our Vote”

The process of “delivering our vote” should not be left to chance. In many elections (perhaps 50 percent or more), a block of votes of the size that is represented by MEA members and their families can be a key to winning.

The following steps are suggested:

1. Building-level meetings with MEA members should be held to build awareness:
 - a. Describe S & R procedures and emphasize fairness.
 - b. Discuss the recommendation.
 - c. Point out the importance of the MEA vote.
 - d. Sign up volunteers for specific campaign activities.
2. Sell our candidates:
 - a. In literature mailed **early** to members that vote absentee. A list of absentee voters can be obtained from your local UniServ office, through the VAN. Absentee ballots for the primary are available starting the 3rd week of June 2018 and available the 4th week of September 2018 for General Election.
 - b. In literature mailed to members that vote on Election Day.
 - c. In local association publications.
 - d. At local events, like membership meetings or TGIF parties – invite candidate(s).
3. Make pre-election reminder calls:

Use phone banks to remind members of the recommended candidate(s) several days before the election.
4. Get out the vote (GOTV):

Use phone banks to get out the vote (GOTV) on Election Day. Whenever possible, these phone efforts should be tied to poll watching.
5. Working together:

Probably several candidates within your geographic area will be recommended, so your committee will undoubtedly want to work closely with other S & R committees, coordinating councils, local associations, PACs and other association groups to make the most of available resources.

Guidelines for Local Recommendations

The initial meeting to consider local recommendations shall be called by the coordinating council chairperson or council PAC chairperson in consultation with the UniServ director(s). Representation will encompass all MEA-affiliated locals included in the election district for the office under consideration (e.g., school board, city commission, county commission, district court, circuit court, etc.).

- The time and place of the first meeting shall be included in the invitation. All locals in the area must be invited and aware of the process.
- At the first meeting, a chairperson shall be elected from the S & R committee.
- Minutes shall be taken at all S & R committee meetings.
- Voting representation shall be equal for all MEA-affiliated Locals/ Coordinating Councils within the applicable voting district.
- Members of the S & R committee shall be MEA members in good standing and current contributors to MEA-PAC. A recommendation shall be made by a majority vote of the S & R Coordinating Council Representatives attending the S & R.
- The continuing recommendation policy shall apply in local races.
- Questionnaires for district and circuit court races can be provided by MEA Public Affairs upon request.

Appendix I: Election 2018 MEA Candidate Questionnaire

Questionnaire to be filed with MEA Public Affairs after local screening interview. Please reproduce this sheet as necessary. Numbers on questions are for reference purposes and do not indicate priority.

Please feel free to attach comments for any of the following questions where you agree or disagree with MEA's position.

Candidate's Name:

Legislative District No.: _____ House: _____ Senate: _____

1. MEA supports legislation that provides funding for the reduction of class size (pre-K-12) to a student to teacher class size ratio that shall not exceed 24 to 1 for all secondary general education and 21 to 1 for all primary levels and a proportionately lower number in programs for students with special needs.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

2. MEA supports increased state funding for Michigan's community colleges, and four-year colleges and universities to make higher education more affordable for all students.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

3. MEA supports legislation that provides state funding for school modernization and updating of facilities.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

4. MEA supports requirements that all schools receiving public funds are staffed by fully certified, professional employees and would oppose any effort to weaken this requirement.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

5. MEA opposes the use of public tax dollars for tax credits for nonpublic K-12 schools.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

6. MEA believes that Pre-K -12 education funding should not go to profits, and that all available public dollars should go to the educational process for students.

_____ Agree with MEA's Position _____ Disagree with MEA's position

Comment(s) _____

7. MEA supports the preservation and strengthening of collective bargaining rights for all public education employees including the restoration of the right to negotiate over all terms and conditions of employment.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

8. Research shows that investments in public education have a greater net impact on job growth, income growth, income distribution and productivity than tax cuts and subsidies. MEA believes legislators need to appropriate sufficient funds to maintain the infrastructure of state government and maintain quality schools and all public services. We believe this is the constitutional duty of all policy makers.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

9. MEA supports the ability of the parties to use binding arbitration to resolve bargaining impasses, similar to the system currently in place for police and fire employees.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

10. MEA opposes legislation that would deny new school employees coverage in the existing defined benefit retirement system and would, instead, force them into a defined contribution system.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s): _____

11. In a typical state, the lowest 20 percent of income earners pays about \$11 in state and local taxes out of every \$100 they earn, while the top 1 percent of income earners pays about \$1 of \$100 they earn.

Would you support legislation that distributes the tax burden more evenly among all income earners?

_____ Support _____ Oppose

Comment(s): _____

12. MEA believes a strong educational system benefits business in Michigan and because of that believes that business has an obligation to pay a fair share of the cost of educating its future workforce.

_____ Agree with MEA's Position _____ Disagree with MEA's Position

Comment(s): _____

13. MEA supports the ability of the Michigan legislature to determine revenues for funding education and other services provided, such as police and fire protection. Understanding that one of the responsibilities of a legislator is to vote for appropriating funds for such services and to make sure there are revenues to fund such services, is it your intention to sign a "no tax increase" pledge?

_____ Yes, I will sign a "no tax" pledge.

_____ No, I will not sign a "no tax" pledge.

Comment(s): _____

14. MEA supports the right to organize and belong to a union. Members should have a choice to join the union or to pay fair-share fees for services provided. This position is contrary to the so-called "right-to-work" law, which denies unions from charging a fee for representation under a contract.

_____ Agree with MEA's position _____ Disagree with MEA's position

Would you be willing to sponsor or support legislation to repeal the so-called "right-to-work" law?

_____ Yes _____ No

Comment(s): _____

15. MEA believes that student growth as a percentage of a teacher's evaluation should be lowered significantly from current law (40%), and that the state should support and fund training on evaluation implementation for administrators and teachers.

_____ Agree with MEA's Position _____ Disagree with MEA's Position

Comment(s): _____

16. MEA supports legislation that requires public school academies (charters) and cyber schools to be held to the same transparency and accountability standards and expectations as traditional public schools.

_____ Agree with MEA's position _____ Disagree with MEA's position

Comment(s) _____

17. Would you support legislation that would stimulate our state economy through investments in public education and place a limit on tax cuts and subsidies?

_____ Support _____ Oppose

Comment(s): _____

18. Public Act 152 of 2011 mandates that a public employer can only pay 80% or a state-mandated hard cap amount toward medical benefits. Currently, this choice is an employer decision for public school employers. Most public school employers have chosen the state-mandated hard cap which annually rises on average between 2.5-3.5%; medical benefit annual increases have often been higher. Would you support legislation to eliminate the state-mandated hard cap and allow for all employees to pay a maximum of 20%, which is equivalent to the amount the state legislators pay for their medical benefits?

_____ Support _____ Oppose

Comment(s): _____

19. Currently, Michigan law prohibits payroll deduction of union dues by public school employers. Would you support legislation that would allow payroll deduction of union dues for public school employees just like other Michigan public employees?

_____Support

_____Oppose

Comment(s): _____

20. Universities are reporting a massive drop of applicants to their respective colleges of education and many school districts have positions that are going unfilled. At the same time, many are leaving the education profession at an alarming rate. Would you support legislation to reward and/or promote careers in public education? If so, what ideas do you have for using legislation to address this growing issue?

_____Support

_____Oppose

Comment(s): _____

21. If there are any other areas you would like to discuss, feel free to attach additional material.

To be considered for a contribution from MEA-PAC, this questionnaire, along with the candidate recommendation form and the candidate profile, must be on file with MEA prior to the issuance of any contribution.

**Appendix II: Election 2018 Screening and Recommendation
Committee Form**

*Committee Attendance Form to be filed with MEA Public Affairs.
Please reproduce this sheet as necessary.*

Legislative District No.: House: _____ Senate: _____

Committee Members

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Name: _____

Home Address: _____

Phone: _____

- Teacher ESP MAHE MEA-Retired
 MEA Staff Legislative Council Member

Appendix III: Election 2018 Candidate Recommendation

Recommendation Form to be filed with MEA Public Affairs. Please reproduce this sheet as necessary.

Name of Candidate: _____

Date of Recommendation: _____ District No.: House: _____ Senate: _____

Type of Recommendation: Regular Continuing Replacement

Type of Election: Primary
 General
 Special Primary
 Special General

Amount and source for local PAC contribution: _____

Requested amount for supplemental MEA-PAC contribution: _____

Mail MEA-PAC contribution to*:

* Checks are normally mailed to the S&R's assigned lead UniServ Director, so that the S & R committee or its designee can deliver the contribution in person.

Activities planned to communicate this recommendation to the membership and to "turn out" our vote:

I (we) verify that all procedures and policies of MEA-PAC have been adhered to in the recommendation of the above-named candidate.

Date

Signature of S & R Committee Chairperson

Date

Signature of lead UniServ Director

To be considered for a contribution from MEA-PAC, this form, along with the candidate profile and the candidate questionnaire, must be on file with MEA prior to the issuance of any contribution.

Appendix IV: Election 2018 Candidate Profile

(To be completed by the candidate prior to committee interview)

Candidate's Name: _____

Legislative District No.: _____ House: _____ Senate: _____

Home Address: _____

County: _____

Home Phone: _____

Mobile Phone: _____

Business Address: _____

Business Phone: _____

Website Address: _____

E-Mail Address: _____

Statement Describing Candidate's Views on Public Education: (may be used in MEA Communications)

Campaign Committee: _____

Address: _____

Phone: _____

Campaign Manager: _____

Address: _____

Phone: _____

State level candidate/incumbents must provide electronic photograph to be e-mailed to PAC@mea.org .

To be considered for a contribution from MEA-PAC, this form, the candidate recommendation form, along with the candidate questionnaire, must be on file with MEA prior to the issuance of any contribution.

Appendix V: Election 2018 Candidate Interview Schedule

Please reproduce this sheet as necessary.

Date: _____

Legislative District No.: House: _____ Senate: _____

Location of S & R: _____

Name of Candidate(s):

8 – 8:45 a.m. _____

9 – 9:45 a.m. _____

10 – 10:45 a.m. _____

11 – 11:45 a.m. _____

12 – 12:45 p.m. _____

1 – 1:45 p.m. _____

2 – 2:45 p.m. _____

3 – 3:45 p.m. _____

4 – 4:45 p.m. _____

5 – 5:45 p.m. _____

6 – 6:45 p.m. _____

7 – 7:45 p.m. _____

8 – 8:45 p.m. _____

9 – 9:45 p.m. _____

10 – 10:45 p.m. _____

Appendix VI: Sample Invitation to Screening & Recommendation Interview

The following letter – or some variation of it – should be mailed to the candidate after you have personally contacted and scheduled a meeting with him/her.

[date]

[name]
[address]
[city, state, zip]

Dear [Mr./Miss/Ms./Mrs.] [last name]:

Since you are a candidate for the [district number] District of the Michigan [House of Representatives/Senate], MEA is interested in learning more about your views on education and other concerns of our members. Therefore, the [district number] Screening and Recommendation Committee, representing MEA members from across the district, cordially invites you to a screening and interview session at [time, date, location].

Enclosed is a candidate profile and candidate questionnaire. We ask that you please complete and return them by [date]. It should be emphasized that no candidate will be considered for support unless he or she returns these materials.

Please do not hesitate to contact our UniServ director, [name], if you have any specific questions. We are looking forward to meeting with you on [date].

Sincerely,

[name]
[title]

Enclosures

Appendix VII: Election 2018 Screening and Recommendation Checklist

Candidate's Name: _____
Legislative District No. _____ House: _____ Senate: _____
Home Address: _____
Home Phone: _____
E-mail Address: _____
Campaign Address: _____
Campaign Office Phone: _____
Campaign Website: _____

Screening and Recommendation Information

Interview: Date: _____ Time: _____ Location: _____

Candidate confirmed on: Date: _____ Time: _____ By: _____

 Invitation letter sent	Date: _____
 Questionnaire/Profile sent	Date: _____
 Questionnaire/Profile received	Date: _____
 Colorphoto(s) received	Date: _____

<input type="checkbox"/> Continuing Recommendation	Date: _____
<input type="checkbox"/> Recommended	Date: _____
<input type="checkbox"/> Not Recommended	Date: _____

Screening and Recommendation Committee/Contacts/UniServ:

Appendix VIII: Sample Oral Interview Questions

Do NOT Send to Candidates

The following questions are presented as a guide to developing a strategy for the candidate interviews. They are meant to supplement the candidate questionnaire. Not all questions should be included in the interview and each individual S & R committee should select those it deems most important in their legislative district. Additional questions based on local concerns are always encouraged. **A copy of the questions asked in the interview and notes on the candidate's responses must be sent to the MEA Public Affairs along with other required forms.**

Sample Questions for All Candidates

1. Please spend a few minutes giving our members some background information on, and a short synopsis of, your experiences and qualifications.
2. What do you believe will be the major issue in this campaign?
3. What do you see as the strengths of Michigan's public education system?
4. Are there any areas you would like to see changed or improved?
5. Due to numerous changes to Michigan's tax structure, the School Aid Fund has been reduced by hundreds of millions of dollars over the last 20 years resulting in reduced funding to K-12 Schools, Intermediate School Districts and Public School Academies. If elected, do you have a plan for how to adequately fund pre-kindergarten, elementary and secondary education programs?
6. Until the 2011-2012 budget year Community Colleges and Higher Education were traditionally paid for by the General Fund Budget not the School Aid Fund. Beginning with that budget, the School Aid Fund was used to partially offset cuts to higher education causing further cuts to the pre-kindergarten, elementary and secondary education programs. Would you be willing to sponsor and work to pass a constitutional amendment to dedicate the School Aid Fund to pre-kindergarten, elementary, and secondary education programs?
7. How would you provide funding to adequately support our community colleges and higher education institutions?
8. MEA sponsors an insurance trust named MESSA. Recent changes in the law in Michigan make it hard to pool small school districts to spread the risk due to claims reporting down to groups as small as 100 employees. Would you support changing those laws to encourage MESSA, and other insurers to increase pooling?
9. Health benefits for public school employee retirees have not been prefunded since 1991. Today, there is more than \$26 billion in unfunded liability in the health fund, and benefits are now paid on a pay-as-you-go basis. If elected, what will you do to make certain that health benefits are funded in a manner to meet the state's future obligations to our public school employee retirees?
10. Are you supportive of preserving health insurance benefits for public school employee retirees and avoiding any attempt to shift health care costs to retirees?

11. Should charter schools that do not perform better than the host district in which they are situated be retained or eliminated? Would you sponsor legislation to require elimination? What about legislation to increase transparency and accountability for charter and cyber schools? Do you support county enhancement millage dollars being shared with charter schools run by for profit companies?
12. Professional development is a key to keeping our public school employees trained in the latest educational developments. How will you ensure that time, opportunities and resources for ongoing professional development occur?
13. There are groups who claim that anyone can teach and certification to teach is unnecessary. Do you support or oppose maintaining Michigan's rigorous certification requirements?
14. Many of our public school buildings are aging and in need of repair, updating, and in some cases, replacement. Many of our buildings are unable to take advantage of technological equipment and resources due to outdated electrical and structural deficiencies. If elected, how would you address this tremendous statewide need for public school infrastructure?
15. What is your position concerning the outsourcing of services within the public school systems? Are there any areas that you believe can/should be outsourced? Why?
16. If employees are outsourced, do you believe that either the school district or the private employer should be required to assume the payments for the unfunded liabilities the state incurred for benefits to which the employees are entitled?
17. Equal educational opportunity for all students is a basic right. What action will you take to bring about equal education for all students regardless of race, creed, color or gender?
18. The Legislature has enacted a number of prohibited topics of bargaining for school employees but not other public employees. Do you support the right of school employees to bargain over all wages and working conditions?
19. Several years ago the legislature passed a law that requires schools to start the school year following Labor Day. Since that time, due to federal and state legislation, additional requirements have been added to require additional student achievement. Would you support legislation to allow local districts to set the starting date for the school year? Should that, along with other calendar decisions, be a subject for collective bargaining?
20. By what process do you believe schools should be rated and what is the interconnection of that process with standardized test scores?
21. Do you think that schools should be "gun-free zones"? What steps do you think need to be taken to ensure students and school employees are safe from violence in Michigan schools? Do you support legislation to arm school employees?
22. What support do you have? What personal, professional and/or organizational recommendations do you expect to obtain?
23. How much of your budget have you personally raised? How much from other organizations like MEA? How is your campaign coordinated with the legislative caucus?
24. Please give an overview of the major elements of your campaign plan.
25. If recommended, what assistance will you be requesting from the MEA?
26. Why do you feel you are the best candidate for this legislative district?
27. Committee Member Question(s) _____

APPENDIX IX: SAMPLE RECOMMENDATION NOTIFICATION LETTER

Date

Jane Smith
10350 Anywhere Road
Pleasant Campaign, MI 49747

Dear Jane:

It is my pleasure to inform you that MEA's _____th District Screening and Recommendation Committee voted to recommend to our members that you be elected to the position of (State Representative) (Senator) for the ___th (House) (Senate) District. As an educational service to our members, we will publish your name and information about your candidacy to educators and education support professionals in the ___th District urging them to vote for you as the recommended candidate. We also will endeavor to assist you in your campaign should you desire such assistance.

Also, as a recommended candidate you may state in your campaign materials that you have been recommended by the members of the Michigan Education Association.

We wish you success in your bid to become a member of the Michigan House of Representatives/Michigan Senate, and we look forward to working with you when you are elected.

If you have any questions about this recommendation, please feel free to call me at

_____.

Sincerely,

Jill Doe
PAC Chair

Cc: _____ HQ Legislative/Political Contact
_____ UniServ Director

Appendix X: SAMPLE REJECTION LETTER TO CANDIDATES

Date

Candidate Name
Candidate Address
City, State Zip Code

Dear _____:

I am sorry to have to inform you that MEA's _____th District Screening and Recommendation Committee chose not to recommend you to our members in the _____th District of the (House of Representatives) (Michigan Senate).

We thank you for your interest in speaking with our members, and wish you the very best in your endeavors.

Should you have any questions in regard to this decision, do not hesitate to call me at _____.

Sincerely,

Name
PAC Chair

Cc: _____HQ Legislative/Political Contact
_____ UniServ Director

Appendix XI: Criteria

Criteria Used by MEA Lobbyists in the Preparation of an Assessment.

- 1. *Past voting records (Incumbents)***
- 2. *Committee performance (Incumbents)***
- 3. *Floor performance (Incumbents)***
- 4. *Final evaluation***
 - a. *Continuing Recommendation***

Committee work, floor performance and voting record are supportive of MEA legislative goals, objectives and is a previously *recommended* friend of education.
 - b. *Recommendation***

Committee work, floor performance and voting record are supportive of MEA legislative goals and objectives.
 - c. *No Recommendation***

Committee work, floor performance and voting record are not strong enough to warrant a recommendation. Performance is not bad enough to oppose. Relationship with MEA members in the district is the key to future support.
 - d. *Negative***

Committee work, floor performance and voting record are consistently in opposition to MEA goals and objectives.
 - e. *Not Eligible***

Based on the judgement of the MEA-PAC Chairperson, the incumbents prior actions in office make them ineligible for MEA recommendation.

Appendix XII: Policy Excerpt

Part III. MEA-PAC Policies

D. Congressional, State House and State Senate legislative councils and S & R committees

(As amended by the MEA-PAC Council, October 2013)

I. The S & R committee has a specific charge:

- A.** To examine and evaluate the current offices, incumbents and candidates and determine whom to recommend to our members and other citizens interested in education in that area as the person(s) most qualified;
- B.** To determine which candidates are most apt to protect, maintain and support a strong public school system for the citizens of Michigan.

II. The legislative council has a specific charge:

- A.** To have our membership meet on a regular basis with the legislator(s) to discuss and share concerns on issues affecting the educational community;
- B.** To keep the local membership informed and involved as to legislative activities;
- C.** To assess the local MEA members' legislative needs and concerns;
- D.** To cause the local MEA membership to be aware of MEA's legislative agenda.

III. The MEA-PAC chairperson shall publish a list of Congressional, State House and State Senate districts enumerating all coordinating councils contained wholly or partially within each legislative district and designating the local UniServ staff, coordinating council PAC(s) and a legislative/political staff member to coordinate the respective S & R and legislative council. This list shall be updated periodically as council structure, staff assignments and legislative district boundaries change. The list shall be published to the Council, all local council PAC chairpersons, coordinating council chairpersons and all appropriate staff. Any challenges to the list shall be decided by the Governing Board within forty-five (45) days of the challenge being filed with the chairperson.

- A.** Meetings of a legislative council or S & R committee shall be called by the designated UniServ staff, in conjunction with the designated legislative/political staff member and local coordinating council PAC(s). Notices shall be sent to all coordinating council chairpersons, UniServ directors and PAC chairpersons identified in the aforementioned list. Coordinating council PAC chairpersons shall ensure their council PAC is represented at the meeting pursuant to local governance documents. While not required, it is recommended that members of legislative councils and S & R committees be residents of the respective legislative district. All members of legislative councils and S & R committees shall be MEA or MEA-Retired members in good standing and current contributors to MEA-PAC.
- B.** The following standards shall be adhered to by each S & R committee:

1. The S & R committee, as the recognized committee, shall have full authority to:
 - a. decide whether or not to interview candidates for a particular office. No invitations for an interview shall be sent until the S & R committee determines that interviews will occur. Such determinations may be made at either an in-person meeting or via electronic means; and
 - b. once interviews are conducted, determine whether to recommend or not to recommend a candidate.
 2. PACs whose coordinating council membership is contained either wholly or partially within the respective legislative district shall have equal representation and share equally in the full recommendation process.
 3. The S & R committee shall recommend to MEA-PAC the contribution of not more than the maximum contribution limitation for recommended candidates for state Legislature.
 4. Each coordinating council PAC shall encourage individual voluntary member support of recommended candidates. A coordinating council or local association may not make a recommendation in a race before the S & R committee has decided either not to interview candidates or not to recommend a candidate. When an S & R committee decides not to make a recommendation, a coordinating council or local association may make a recommendation to its members, but may not make a financial contribution.
 5. Coordinating council PACs may only communicate the recommendation of a candidate for state House and Senate to the MEA membership. Communication to the general public about candidate recommendations must be done by MEA-PAC in accordance with campaign finance law.
 6. The S & R committee shall examine a candidate's electability and resources and weigh such factors above other factors, such as MEA membership, when making a recommendation.
- C.** Members of an S & R committee shall not be actively committed or made a reportable contribution to any candidate's campaign for office being considered nor shall they be candidates for elected office other than precinct delegate.
- D.** In the event that recommendations in a primary create an overlap of congressional House/Senate or state House/Senate races, the MEA-PAC chairperson shall convene a meeting with all affected local PACs to review strategy and develop a plan of action.
- E.** The membership requirements necessary to serve on the legislative councils are:
1. All local associations (EA, ESP, Higher Ed and MEA-Retired chapters) located within the respective legislator's district are eligible to select one or more persons to attend and participate in the legislative council's activities;

2. Said members shall be MEA-PAC contributors, be registered to vote, live in and/or be employed in the legislative jurisdiction and be interested in political action and legislation;
3. Members of the S & R committee shall serve on the legislative council;
4. All members of legislative councils and S & R committees shall be MEA or MEA-Retired members in good standing and current contributors to MEA-PAC.

IV. Each S & R committee shall:

- A. Elect a chairperson to serve at each meeting.
- B. Discuss as part of the S & R process the political demographics of the district and an analysis from the assigned legislative/political staff member.
- C. Ensure that, except in continuing endorsements, all eligible candidates from the major parties are invited for an interview. Any limitations on eligibility of candidates to participate shall be made by the MEA-PAC chairperson, with the consent of the Governing Board. Any challenges to such limitations shall be decided by the Governing Board within forty-five (45) days of the challenge being filed with the chairperson.

- V.** It is understood that no coordinating council PACs will make any direct cash or in-kind contributions to candidates for statewide offices or the office of state senator and state representative. This does not preclude, however, individuals from privately volunteering services to recommended candidate committees or from contributing the maximum contribution to candidates as long as PAC money is not utilized.

VI. *Rescinding a Local S & R Committee Recommendation*

- A. MEA-PAC strongly believes in the integrity of the local S & R process and would consider rescinding a recommendation only in extraordinary circumstances.
- B. If, subsequent to the recommendation and at least thirty (30) days prior to the election, a local screening and recommendation committee wishes to recommend that a recommendation be rescinded because the incumbent/candidate adopts or changes his/her position on a public issue of major concern to our members, the following process shall be utilized:
 1. The local S & R committee must reconvene the committee which made the most recent recommendation for the purpose of reconsideration of their previous action.
 2. A two-thirds vote of the S & R committee would be required to recommend to MEA-PAC that the recommendation be reconsidered.
 3. The recommendation for rescinding a recommendation shall be made in writing to the chairperson of MEA-PAC.

4. The chairperson must be notified at least thirty (30) calendar days prior to the scheduled election of the need to call a meeting of the Governing Board.
5. The chairperson will convene a meeting of the MEA-PAC Governing Board to hear the recommendation. If the rescission appeal is made within two (2) weeks of a scheduled Council meeting, the Council shall hear the appeal. All S & R committees whose candidate recommendations could be affected, shall be invited to be present and to speak to the issue (See B, 9).
6. At least one (1) member of the initiating local S & R committee must be present to do an oral presentation to the Governing Board/Council and copies of appropriate written materials must be supplied.
7. Members of the Governing Board/Council will disqualify themselves in any appeals on behalf of candidates:
 - a. In whose campaign they are actively involved;
 - b. In whose districts they live or work.
8. There will be no additional appeal beyond the Governing Board/Council.
9. Any action by the Governing Board/Council to rescind a recommendation shall affect any and all MEA-PAC recommendations where the candidate/incumbent has exhibited the same infraction.
10. If the Governing Board/Council votes to rescind a recommendation:
 - a. MEA members shall be notified of such action at least seven (7) days prior to the scheduled election.
 - b. A letter explaining the action will be authored and signed by the MEA-PAC chairperson and the members of the local S & R committee.
 - c. No further recommendation can be considered for the seat(s).
 - d. The chairperson of the local S & R committee shall notify the incumbent/candidate of a rescinded recommendation within 48 hours of the action of the Governing Board/Council.

VII. Recommendation follow-up

It is recommended that following the election of the recommended candidate, the legislative councils, including members of the S & R committee, shall serve as a continuous liaison with the candidate so as to enhance communications, lobbying and performance.

VIII. Special screening requirements

The S & R committee shall question all screened candidates on voting records and/or campaign statements as they relate to the NEA and MEA resolutions on Representatives of Minority Persons, 3-1(g) and women's concerns to ascertain whether or not such candidates' positions are consistent with NEA and MEA positions. In addition, the candidates' stance related to millage elections, privatization, district consolidation and collective bargaining should be determined.

IX. Participation of coordinating council PACs

Coordinating council PACs are required to participate in Michigan House, Michigan Senate and Congressional S & R committees. These S & R committees must follow procedures for screening and recommendation of candidates for these offices as adopted by MEA-PAC.

X. Presentation of contribution

All MEA-PAC checks awarded in recommended races shall be made out to the candidate's campaign committee but mailed to the S & R committee chairperson, or designee, who shall deliver all checks, letters and media statements. MEA staff assigned to S & R committees shall maintain an advisory role.

XI. Continuing Recommendation

- A. MEA-PAC-recommended incumbents in Michigan House, Senate and Congressional districts seeking re-election to those seats shall receive continuing recommendation if authorized by the S & R committees in those districts.
- B. Criteria for determination of continuing recommendation by S & R committees shall be the voting record of the incumbent, lobbyists' assessment as to his/her legislative department on issues of concern to MEA not discernible in voting record and back-home assessment. Determination of an incumbent's eligibility for continuing recommendation status shall be made by the MEA-PAC chairperson with the consent of the Governing Board. Any challenges to such determinations shall be decided by the Governing Board within forty-five (45) days of the challenge being filed with the chairperson.
- C. In the event continuing recommendation has been determined, the S & R committees shall waive the screening of other candidates seeking our recommendation to those seats.
- D. A simple majority vote of the S & R committee is required for recommendation.
- E. If an incumbent is eligible for a continuing recommendation and one is not granted (for the same office) by the S & R committee, no other candidates shall be considered in that election cycle unless an appeal is granted by the Appeals Committee (See Section G). The Appeals Committee shall also have jurisdiction over the reconsideration of a S & R committee's decision to deny a continuing recommendation.
- F. If there is a challenge to the decision not to grant a continuing recommendation or the S & R committee wants to consider other candidates after denying a continuing recommendation, they may request a meeting of the MEA-PAC Appeals Committee through the chairperson of MEA-PAC.

G. The MEA-PAC Appeals Committee:

- 1.** Will be a five (5) person subcommittee of the Governing Board, appointed by the MEA-PAC chairperson.
- 2.** There shall be no additional appeal beyond the subcommittee, e.g., to the Governing Board or Council.
- 3.** At least one (1) member of the local S & R committee must be present to do an oral presentation to the MEA-PAC Committee.
- 4.** The Appeals Committee will be supplied with copies of appropriate materials needed for their consideration such as the names of all members of the S & R committee, addresses, positions, etc., and the minutes of the meeting which determined not to give the recommended continuing recommendation, reasons for such action and the results of the vote to appeal to the chairperson of MEA-PAC.
- 5.** MEA staff shall present to the Appeals Committee the rationale for granting a continuing recommendation, not granting a continuing recommendation or considering other candidates.
- 6.** All appeals shall be heard at least thirty (30) days prior to the election.
- 7.** The Appeals Committee may grant the S & R an exception to the policy which would allow the local S & R to consider other candidates for the office.
- 8.** The S & R committee shall be bound to the decisions made and directions for implementation given by the Appeals Committee.
- 9.** Members of the committee shall disqualify themselves in any appeals on behalf of candidates:
 - a.** In whose campaign they are actively involved.
 - b.** In whose district they live or work.

Appendix XIII: Policy Excerpt

E. Guidelines for local recommendations

(As adopted by the MEA-PAC Council, October 2013)

- I. The initial meeting to consider local recommendations shall be called by the coordinating council chairperson or council PAC chairperson in consultation with the UniServ director(s).
 - A. The time and place of the first meeting shall be included in the invitation.
 - B. At the first meeting, a chairperson shall be elected from the S & R committee.
 - C. Minutes shall be taken at all S & R committee meetings.

II. Representation

- A. Representation will encompass all MEA-affiliated PACs included in the election district for the office under consideration (e.g., city commission, county commission, circuit court, district court, etc.).
- B. Voting representation shall be equal for all MEA-affiliated PACs involved.
- C. Members of the S & R committee shall be MEA members in good standing and current contributors to MEA-PAC.

III. Screening and recommendation

- A. A recommendation shall be made by a majority vote of the S & R committee.
- B. The continuing recommendation policy shall apply in local races.
- C. Questionnaires for district and circuit court races shall be provided by MEA upon request.

IV. Contributions

- A. The S & R committee shall determine the contribution of not more than maximum contribution limitation. A contribution to local candidates should be shared equally, when appropriate, by all MEA-affiliated PACs involved in the screening and recommendation.
- B. Other types of support should also be considered and decided upon by a majority vote. Examples would be distribution of yard signs, media spots, literature drops and/or mailings.