

THE AWESOME IEA Podcast

Episode 2: How a Recommendation Meeting Works

K: *Welcome to the AWESOME IEA Podcast brought to you by the Illinois Education Association.*

D: The podcast for curious well-informed association members.

K: I'm one of your hosts, Kelsey Harms, Computer Specialist from the IEA Program Development Department

D: And I'm Diana Zaleski, one of your Instructional Resource and Professional Development Directors from IEA Teaching and Learning.

K: The goal of this podcast is to educate our members about important new educational policy initiatives in a brief and *hopefully* entertaining format.

D: Today we are going to discuss Recommendation Meetings with our special guest Jim Reed, IEA Director of Government Relations. Jim, thanks so much for being with us today.

J: Well thank you, it's my pleasure to be here.

D: So, let's jump right in. Can we start off with just a quick overview of what IPACE is?

J: Sure, so IPACE stands for the Illinois Political Action Committee for Education, and it is the entity by which members have a voice in the political process. So, it really is aside from the educational side of the IEA, IPACE is really a separate entity to focus on political activity, legislative activity, and member engagement.

K: Now that we know a bit more about the political action committee, can you help us understand what the purpose of recommendation meeting is and when they occur?

J: So, the whole purpose of a recommendation meeting is really to provide members to one – engage with their elected officials, which they should hopefully be doing throughout the year, but certainly it seems they tend to be a little bit cyclical, in terms of when the election cycles are. So, it gives them an opportunity to meet with them, to talk with them about issues that they care about. But it also really provides a system of checks and balances on legislatures. So, we as lobbyists interact with legislators during the legislative cycle, but often times they don't necessarily vote in a way that reflects our interests as IEA, as advocates for public education. And so, the recommendation meeting is not only a way to make sure that we are able to provide resources in a legal way, consistent with the state board of elections, but it also makes sure that our members can face to face sit down with these legislators and ask them why they did or did not support us on a particular initiative, or why they may be veering off to support something that's harmful to public education. Or in some instances if it is a friendly relationship an opportunity to thank them for the work they've done and thank them for being an advocate. And asking them how they can do more to support our initiatives and our efforts.

K: So, these happen typically before primaries? Or do you wait until the general election? When are these happening?

J: Sure, so the election cycle in IL is a little bit interesting in that it doesn't follow a traditional calendar. The election cycles are broken into 2 parts. You have 1 that essentially starts in January 1st of the year after an election. So, like the last election cycle began after the 2016 election, so the January 2017, it runs from January 17 all the way to the primary election in 2018. So, a little bit over, close to a year and a half. The 2nd half of the election cycle starts the day after the primary election, and runs until the end of the year. So, we're in the January 2017 cycle which will end on March 20. The new cycle will begin on March 21st, but only goes until December 31st.

So, the recommendation meetings can occur at the state level basically around two times, 1 around the primary election which we have coming up in March. Which is why we've had a number of recommendation meetings that have occurred, between you know, late December and will happen probably until early March. The next cycle will happen with a little more time to have members attend and also to be a part of the election cycle. Most of those will happen in June and July.

We don't traditionally conduct recommendation meetings while the legislators are in session because we do try to have that separation between what they are doing legislatively and what they are doing politically. You know, we don't provide resources for events and things like that during the legislative session. But, we do provide resources for those candidates that are running in elections. So, usually those are the two blocks. At the local level, there will be recommendation meetings that happen for the school board elections, those happen in odd numbered years. Recommendations for state house and constitutional officers usually happen in even numbered years.

K: That's great to know.

D: Yeah, that's very helpful. So, how did recommendation meetings get started?

J: That's a great question, and one I sort of had to go back and look a little a bit. I know that we've been doing them for a while, but I didn't really know the full history behind it, so indulge me for a minute here, because I think it is interesting, to know that the organization was really forward-thinking when they decided to start doing these, and really on top of things going on nationally.

So, recommendation meetings began in 1971 and are consistent with the federal election campaign act. At the federal level it was at that time that the federal campaign laws were changed to allow and require full reporting for contributions and expenditures. They put limits on spending for media advertising. It was an opportunity for unions and corporations to start providing funding. So, all those things were done in 1971 at the federal level and so a number of the states working with NEA then decided to modify how they were recommending and providing endorsements for candidates. So, IEA/NEA were really right on the front leading edge of that when all of this occurred. We've been doing this ever since 1971 with slight modifications to the policies and procedures as well as the bylaws but predominantly have done them in the same way since 1971.

K: So, Jim, can you talk to us a little bit about who is invited to these recommendation meetings, and how are they invited? What form or method should they be watching?

J: So, we invite the most important participant in the recommendation meeting, in addition to the candidate, is the local president. We have a local weighted vote system, which I'll talk more about later, but the local president is the person who casts the vote to recommend a candidate. The other participants in the meeting are our IPACE executive committee members, and NEA directors attend

because we also do congressional recommendations at the local level. We want our GPA and our grassroots political activists to be involved, as well as our UniServ Directors and our region chairs, and any dues paying members of the organization are welcome to attend. Now it's difficult with all the recommendation meetings to invite all of those members individually, but certainly the local presidents, IPACE Directors, UD's, and region chairs are invited on all recommendation meetings that are applicable to their area and those usually go out by email. Now the important thing to remember is that IPACE is a separate entity and a political entity, we do not send those to school email addresses so even more important that if you are interested in attending as a local president or member that we have your personal email address to send it. Otherwise we have to send it by snail mail.

D: What happens at a recommendation meeting? Can you sort of lay out the process?

J: Sure, so it varies a little bit from lobbyist to lobbyist because we all have our own styles. But really the meeting is about three things. First, it is about educating the members themselves about the district and the candidate and that is done through a combination of things. One, every candidate that comes to interview with us has to fill out a candidate questionnaire. A candidate questionnaire at the statehouse level is drafted by the lobbyists in conjunction with the IPACE executive committee. For members of congress it is actually done by NEA, they have a separate rather extensive questionnaire that they do. So, candidates have to do that and then there is a separate report card that is based upon their voting record for the last legislative cycle. NEA does theirs on a bit of a two-year cycle, we do ours annually. So, every candidate who comes will have a questionnaire and a report card.

K: So, the lobbyists do the report card? Who does that for us?

J: So, the lobbyists and the GR department will decide the bills that are most applicable for that cycle. It's done in conjunction with the IPACE committee, but those bills that we pick are usually ones that we have worked on rather extensively. The legislators know that they will be graded on those particular bills so we're not trying to blindside or stack it in one way or another. And usually they are things that you wouldn't be surprised by. It might be a funding bill, it may be a bill dealing with ESP's subcontracting, or a bill dealing with higher ed funding. So, all the traditional things that are on there are part of the report card. We have modified our report card in recent years to be more consistent with NEA and that there's a separate section that allows for legislators to get points of they're doing behind the scenes work, they serve on particular committees, education committee, or an appropriations committee they could possibly get extra points for that. Or if they are sponsoring or co-sponsoring a piece of legislation, so that way they can either get points or if they've been counterproductive in that they will lose points. But we want to give as broad a picture as we can about how a legislator has worked with us or has not worked with us over the past cycle.

So that's that first part, it's the education part. Also as part of that meeting most lobbyist will talk about district or what the geographical layout of the district is, what the voting has been like over the past two or three election cycles, whether this a predominantly republican districts or what we would call a swing district in that its very close and that it might change from democrat to republican based upon the presidential election cycle or whatever else is going on. Then the second component after that education component is the candidate part and so the candidate comes in, the members will have hopefully worked on a number of questions in advance so that all the candidates are asked the same questions, and then the candidate will be given the opportunity to make an opening statement. The members will ask the questions and then the candidate is given the opportunity to make a closing

statement. And then once that's over the third part happens and that's really the deliberation where the committee members and attendees will decide if they want to recommend that candidate or whether or not they want to take a pass on that election cycle.

K: So, during recommendation meetings do you have more than one candidate at a time come in?

J: It all depends. So, it really depends on the geographical area. So, for example, in the Matteson office I know a number of years they've done it this way, they've invited all of the candidates from that particular region or that office to come in and have a meeting and sit and sort of listen to all the different candidates. Sometimes the challenge with that is that because the votes are specific to those legislative districts, you may sit through a two or three hour meeting even though you only have to vote for one of the candidates or one of the state reps. Other places, particularly down south where the regions are a little more spread-out or the geographical area is a little tougher you may have a meeting where you're only inviting one candidate. So, it sort of varies with the density of the state.

K: Jim, I've heard about a weighted vote, how does the weighted vote work?

J: So, there's been a lot of discussion about the weighted vote and why we have it and does it fit within our democratic process. You know we basically have a representative body here within the IEA. The board is evenly distributed so that you have one region chair per region but if you actually think about how we do the RA it is representative voting. So, you have more representatives from areas based upon membership. The weighted vote for IPACE works in the same way. So first of all, every local gets one vote based upon their legislative district. The second part is where the weighted vote comes in, that a local will have an additional weighted vote for every ten IPACE contributors. So that's why you see your Napervilles, Schamburgs, Springfield and other areas that are larger have more weighted voting than a smaller area.

So, when you come into a recommendation meeting the local president who is representing that local may come in with 30 weighted votes versus another local president that comes from a smaller area may have only five or two. So that's how the weighted voting works and the challenge of that and why some people say that it's not democratic is because if you've got a difference on who should be the candidate one person who has those ten weighted votes has a voice regardless of what the other two or three say. It absolutely can make a difference especially in districts that may be a swing district and let's say the individual would really like to have a republican and they decide I'm going to cast all my votes for the republican, and the other three who only have a total of eight weighted votes say we're all throwing it for the other candidate, it doesn't matter.

K: So, people who have more weighted votes are they able to split those votes?

J: They can. We encourage local presidents to vote in a way that is representative of their membership. So, if they have those ten weighted votes and they know 30% of their members would oppose a candidate they can split them 7 to 3. But it's their discretion. Now if a local president can't attend they can have a designee. There is a specific form called a local president designee form and that a region chair or a GPA or even a none officer member could be the one who sits in and casts the vote for the local president.

D: Jim, so once a candidate has been recommended, what's next? And is a candidate recommended in future elections automatically?

J: So as part of the recommendation meeting we also always talk about the concept of performance over promise and the idea of acceptability and electability. On acceptability versus electability, acceptability means that they are good on our issues, that they are not supporting elimination of pensions or they're not about reduction of school funding. So, we usually don't get that much of an issue with people that are actually coming to interview with us.

Electability, however, is the more important component of it. Because often times a person may be acceptable (i.e., good on the issues) but if they never get elected they can't really do us any good. So once that person is elected and they meet that criteria then we get to this idea of performance or promise. And as long as that person is IEA recommended and continues to cast votes and work with members in a way that is essentially consistent with what the locals like they keep that recommendation. And they will keep it from one election cycle to the next.

It used to be that we had a system here called the mail ballot that basically you would maintain your recommendation unless someone sent in a notice saying they wanted to challenge that recommendation. Otherwise they keep it in sort of perpetuity. With some of the ways we've gotten burned on the tier two pensions and other things the IPACE executive committee made the decision you basically keep your recommendation as long as you are a performing incumbent and as long as you have a good grade on your report card but there is a provision that always allows for a local president to ask for a recommendation meeting to call in that individual and ask them about it.

So now what we are doing, at least this election cycle, is that if you are a performing incumbent and you don't have an opponent in the primary you don't have to come in for a recommendation meeting. So, you basically will keep that through the primary and on into the election. Basically, as long as you are performing well you will essentially keep it but the only time that we would for sure do a recommendation meeting is if there is a new map drawing which is every ten years. So, for the 2020 election cycle there will be recommendation meetings across the board.

K: So once a candidate is recommended how are they notified?

J: So after the recommendation meeting happens at the local level it has to be concurred with by the IPACE executive committee and that happens 99% of the time. I think I have only seen a couple where that has been overturned. And then usually it's the lobbyist who works with that individual to say, 'hey you got the recommendation.' They're the ones that work with the candidate as they go through the election cycle to make sure they have resources to run an effective campaign.

On the statewide level we'll usually put out some kind of brochure in advance of early voting or around the general election to let people know here are all the IEA recommended candidates for this election cycle and that goes out as an all member mailer to keep people aware. So that's how the outside world will know. Sometimes for statewide candidates we'll do a press event for governor and for the other constitutional officers and that's how the outside world is aware that we are recommending and supporting them. And then the other way is through the board of elections because all of the contributions have to be recorded. Anyone can go onto the state board of elections website and look at the contributions and see that we've contributed and that way they would also see that that's a recommended candidate.

K: Is there anything else you would like to share?

J: I would just encourage folks to be engaged and to be involved, it is a unique opportunity that our members have to be involved in the political process through member contributions to IEA and IPACE have been able to be significant players in the state of Illinois and influencers and we want to be able to maintain that as we move into this very important election cycle.

K: Great, thanks so much Jim. If you have any questions, comments, or feedback, please check out the contact section on the Podcast page on the IEA Website.

D: We will also post some helpful links in the show notes section on the Podcast Page. The links will include links to more information in Recommendation Meetings and IPACE in general.

K: Thanks for joining us!