

GUIDELINES



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NJEA PAC Guidelines were adopted by NJEA PAC Operating Committee May 5, 1973 and amended by that committee on December 8, 1973, February 23, 1974, June 11, 1974, September 7, 1974, January 10, 1975, March 6, 1975, June 6, 1976, June 11, 1977, June 10, 1978, September 9, 1978, June 15, 1979, June 12, 1981, June 11, 1982, June 17, 1983, June 14, 1986, September 6, 1986, September 19, 1987, June 11, 1988, April 6, 1990, August 18, 1992, May 1, 1993, August 13, 1994, April 29, 1995, August 12, 1995, August 16, 1997, April 22, 1998, August 15, 1998, April 28, 1999, August 7, 1999, March 25, 2000, August 6, 2005, April 25, 2007, August 7, 2010, August 6, 2011, August 4, 2012, and August 5, 2017.

CHAPTER 1 PREAMBLE AND DEFINITIONS

Name

The name shall be New Jersey Education Association Political Action Committee (NJEA PAC).

Preamble

To ensure a quality education for each New Jersey child, to advance the teaching profession, to improve the status of school employees, and to achieve legislative decisions consistent with the efforts of the New Jersey Education Association. NJEA PAC shall support candidates who are proven or potential friends of public education for local, county, state and federal offices and NJEA members who are either elected delegates or alternates to the national party conventions.

History

A Political Action Study Committee was established by the NJEA Delegate Assembly in November 1971 to explore the feasibility of political action by NJEA members to the extent of endorsing candidates and participating in political campaigns for their election to office. Reaching the conclusion that the NJEA should establish a political action committee closely allied to the NJEA structure, the study committee recommended an information program for the membership which was adopted by the NJEA Delegate Assembly in May 1972. NJEA Delegate Assembly approval at its November 1972 meeting signaled the beginning of organized political action for the teachers of New Jersey. In February of 1973, the NJEA Executive Committee adopted general guiding principles and established the NJEA PAC Fund.

Organization

NJEA PAC shall consist of:

I. Officers

Chairperson - NJEA President
Vice Chairperson - NJEA Vice President
Treasurer - NJEA Secretary-Treasurer

II. Board of Trustees

The Board shall be composed of the voting members of the NJEA Executive Committee who shall have one equal vote each.

The Board of Trustees shall operate under the following guidelines:

- A. CHAIR: The Chairperson of the Board of Trustees shall be the NJEA President.
- B. VICE CHAIR: The Vice Chairperson shall be the NJEA Vice President.
- C. TREASURER: The Treasurer shall be the NJEA Secretary-Treasurer.
- D. ROLE OF BOARD: The Board shall oversee the total operation of NJEA PAC and may act for the Operating Committee between meetings of that committee. However, such actions shall not be in conflict with established NJEA PAC policy.
- E. TRUSTEES: The Board shall act as trustees of the NJEA PAC Fund.

F. BUDGET: The Board shall establish an annual budget for NJEA PAC.

G. MEETINGS: The Board shall meet as necessary at the call of the chairperson or upon the written request of one-third (1/3) of its members.

H. AGENDA: The agenda for board meetings shall be prepared by the chairperson and the professional staff.

I. ALTERNATES: Provision for alternates shall be made consistent with provisions established for the NJEA Executive Committee.

III. **Operating Committee**

An Operating Committee shall consist of the NJEA Executive Committee, the NJEA Government Relations Committee, the Congressional Contact Committee, the County Association Presidents, the President of the Student NJEA, three (3) NJEA active support members, the NJREA Legislative Chairperson, Vice Chairperson, and three (3) NJREA Legislative Regional Coordinators, one representing north New Jersey, one representing central New Jersey and one representing south New Jersey. All members shall have one equal vote each.

The NJREA Legislative Regional Coordinators and active support members shall be appointed by the NJEA PAC Chairperson with the advice and consent of the PAC Operating Committee. These members shall serve on the committee until their successors are appointed.

The NJ members of the NEA Board of Directors shall act as consultants to the NJEA PAC Operating Committee and be non-voting members.

The Operating Committee shall function under the following guidelines:

A. CHAIR: The Chairperson of the Operating Committee shall be the NJEA President.

B. VICE CHAIR: The Vice Chairperson shall be the NJEA Vice President.

C. TREASURER: The Treasurer shall be the NJEA Secretary-Treasurer.

D. RESPONSIBILITIES: The responsibilities of the NJEA PAC Operating Committee members shall include:

1. Candidate screening and selection
2. NJEA PAC fundraising
3. Promotion of NJEA PAC-endorsed candidates
4. Performance of all duties of NJEA PAC Operating Committee members as outlined in Chapter 7 (forms).

E. ANNUAL REPORT: The Operating Committee shall submit an annual report to the NJEA Delegate Assembly.

F. MEETINGS: The Operating Committee shall meet annually and as necessary at the call of the chairperson, or upon the written request of one-third (1/3) of its members.

G. AGENDA: The agenda for meetings shall be prepared by the chairperson and the professional staff.

H. ALTERNATES: An Operating Committee member may send an alternate, providing the alternate has written credentials from the person to be replaced and submits them to the chairperson; any alternate must be a member of NJEA. (See Chapter 7 – Forms, for the appropriate sample form.)

Any NJEA PAC Operating Committee member who, by virtue of positions held, occupies more than one seat of the NJEA PAC Operating Committee, may send an alternate for one or all of those seats.

I. MINUTES: Minutes of Operating Committee meetings shall be distributed to all members of the NJEA PAC Operating Committee.

J. COUNTY PRIMARY CONTACT: Members of the Operating Committee shall be the only official representatives of NJEA PAC in their respective counties. The senior NJEA Government Relations Committee member in each lead county shall serve as the primary contact person to expedite communications with NJEA PAC officers and staff in state elections.

The senior NJEA Congressional Contact Committee member in each lead county shall serve as the primary contact person to expedite communications with NJEA PAC officers and staff in federal elections.

K. COOPERATION: Operating Committee members from the counties shall be responsible for candidate screening. They shall work in conjunction with the NJEA PAC Operating Committee members of other counties where legislative or congressional districts cross county lines (See VII. Candidate Screening, Selection, and Support).

L. PROCEDURE FOR RECOMMENDING ENDORSEMENT AT NJEA PAC OPERATING COMMITTEE:

1. Each District Screening Committee will make its recommendation by stating the name only of the candidate(s) for endorsement or "your choice" endorsement, or by stating "no endorsement."
2. After all recommendations are complete, the chair will ask if any of the recommendations require further discussion.
3. For any recommendations that require further discussion, the screening committee will explain its decision using the criteria established by NJEA PAC. The PAC Operating Committee will vote on each recommendation following the discussion.
4. The PAC Operating Committee will require a majority vote to:
 - a. Approve the recommendation of the endorsement
 - b. Reject the recommendation of the endorsement
 - c. Ask the screening committee to reconvene based on new information
5. All recommendations that do not require discussion will then be voted on as a bloc.
6. The PAC Board of Trustees shall take final action on all districts asked to reconvene at a later meeting.

M. PROCEDURE FOR ENDORSEMENT OF PUBLIC QUESTIONS:

1. Initial requests for endorsement may be received from a county or local association, an NJEA committee, or an individual NJEA member and shall be accompanied by supporting documentation.
2. All members of the Operating Committee shall receive written notification of the request for endorsement at least 15 days prior to the meeting.
3. Endorsement of public questions shall be by majority vote of those members of the NJEA PAC Operating Committee as a whole present and voting.

N. CONFIDENTIALITY: Members of the NJEA PAC Operating Committee shall keep all deliberations and proceedings regarding a candidate confidential.

IV. Responsibilities of NJEA Officers

A. CHAIR: The chairperson shall preside at all meetings of the NJEA PAC Operating Committee and the Board of Trustees and shall perform such other duties as may be prescribed.

B. VICE CHAIR: The Vice Chairperson shall assume the duties of the chairperson in his/her absence.

C. TREASURER: The Treasurer shall perform such duties as are customarily performed by treasurers and shall file all reports required by law and the internal Revenue Service. The treasurer shall be custodian of all NJEA PAC funds. He/she shall receive all contributions to NJEA PAC and shall disburse all monies in accordance with authorized expenditures. He/she shall see that full and accurate accounts are kept, that financial statements are presented, and that reports to governmental authorities as required by law are kept and filed over his/her signature.

V. **NJEA PAC Fund**

A. NJEA PAC FUND: There shall be an NJEA PAC fund. The fund shall be used to pay direct political contributions, in-kind contributions, direct support of candidate and party committees, and independent expenditure campaigns or other similar activities.

B. FINANCING: The NJEA PAC Fund shall be financed from voluntary and separate political contributions.

C. PAC ACCOUNT: There shall be an NJEA PAC account separate from all other NJEA accounts.

D. AUDIT: The Board of Trustees shall direct and receive an annual audit of the NJEA PAC Fund. No PAC account shall become a part of the budget or general accounts of state, county, or local associations.

E. RECORDS: NJEA shall keep a record of NJEA PAC contributors and amounts given in compliance with applicable laws.

F. DISBURSEMENTS: The NJEA PAC Officers shall approve preliminary disbursements to appropriate campaign committees on behalf of endorsed candidates. Additional disbursements may be approved by the NJEA PAC officers when deemed appropriate.

G. REPORTING: Expenditures on behalf of endorsed candidates shall be reported as directed by the NJEA PAC Operating Committee. A final report of expenses on behalf of endorsed candidates shall be filed with the NJEA PAC Operating Committee. All balances shall be returned to the NJEA PAC Operating Committee with the final report.

H. TICKETS: In consultation with the NJEA PAC officers, and with appropriate discretion, the Director of Government Relations is authorized to purchase tickets to the fundraisers of legislators, elected officials, endorsed candidates, or political parties.

I. COMPLIANCE: NJEA PAC shall comply with all applicable state and federal laws and regulations, including those of the Election Law Enforcement Commission and the Internal Revenue Service.

VI. **Quorums**

A. BOARD OF TRUSTEES: A quorum for the purpose of conducting the business of the NJEA PAC Board of Trustees shall be a majority of the total eligible membership.

B. OPERATING COMMITTEE: A quorum for the purpose of conducting the business of the NJEA PAC Operating Committee shall be a majority of the total eligible membership.

C. SCREENING COMMITTEE: A quorum for the purpose of conducting the business of a screening committee shall be a majority of the total eligible membership.

VII. Amendments

These guidelines may be amended by a 2/3 vote of the NJEA PAC Operating Committee at any regular or special meeting. All members of the Operating Committee shall receive written notification of proposed changes at least 15 days prior to the meeting. NJEA PAC shall review its operating guidelines periodically to ensure proper governance.

VIII. Roll Call Vote

Upon the request of any member eligible to vote, if supported by 20 percent of the total membership of the PAC Operating Committee who are present and voting, there shall be a roll call.

IX. Rules of Order

Robert Rules of Order, Revised, shall govern the meeting of the Operating Committee and the Board of Trustees insofar as those rules are not inconsistent with these guidelines.

X. Dissolution

Should NJEA PAC be dissolved, any funds remaining in its treasury shall be disbursed at the discretion of the NJEA PAC Board of Trustees.

CHAPTER 2

State Legislature Campaigns Senate and Assembly

I. NJEA PAC Endorsement for Primary or General Elections

A. REQUESTS FOR ENDORSEMENT: A county or local association, an individual NJEA member, a candidate, or a political party may request the endorsement of a candidate from NJEA PAC. All requests for endorsement shall be sent in writing to the NJEA PAC chairperson.

B. SEPARATE ENDORSEMENTS: Any action taken by the NJEA PAC Operating Committee in support of a candidate(s) in either or both political party primary elections shall, in no way, infringe on the screening process for the general election.

C. PRIORITY OF RACES FOR POTENTIAL CANDIDATE ENDORSEMENT: The NJEA PAC officers shall select candidates to be screened for an NJEA PAC endorsement on the following priority basis:

1. Races in which consistent and proven supporters and “friends” of education are facing difficulty in returning to office
2. Races in which consistent adversaries are opposed by a candidate who is in agreement with NJEA goals and positions and who has a good possibility of winning
3. Races in which consistent and proven supporters and “friends” of education face no serious opposition in returning to office
4. Races where there is no incumbent and in which one candidate is clearly more in agreement with NJEA goals and positions and has a reasonable possibility of winning
5. Other races in which NJEA PAC may have an interest

The NJEA PAC chair shall refer requests to the appropriate screening committee.

D. APPROVAL OF SCREENING COMMITTEE REQUIRED: The NJEA PAC Operating Committee shall not endorse or approve support of any candidate without the recommendation or approval of an appropriate screening committee.

E. MAJORITY REQUIRED: Endorsement of candidates shall be by majority vote of those members of the NJEA PAC Operating Committee present and voting.

F. COMPLAINTS: Any complaints concerning the operations of NJEA PAC by either candidates or members shall be made in writing to the NJEA PAC chairperson.

G. NOTIFICATION OF CANDIDATES: The NJEA PAC chairperson shall notify in writing every candidate screened of the decisions of the NJEA PAC Operating Committee.

H. APPEALS: No action of the NJEA PAC Operating Committee shall be appealed to the NJEA PAC Board of Trustees except in the case of a request by NJEA member(s) for a rescission of an endorsement based on information not presented at the NJEA PAC Operating Committee meeting at which the endorsement in question was approved.

I. BENEFITS OF ENDORSEMENT:

Endorsement may take the form of:

1. A public statement of support which shall only be made with a candidate's written consent
2. Publicity in NJEA publications
3. Encouraging NJEA members to volunteer on behalf of the endorsed candidate
4. Financial assistance
5. Independent expenditures that are uncoordinated with the candidate campaign
6. Opportunities to meet and speak with NJEA members

Once the PAC operating committee has made its endorsements for a specific election cycle, NJEA PAC shall not provide any of the benefits of endorsement listed in section I to candidates who have not been endorsed.

II. **Preparing for the Screening Meeting**

A. CONFERENCE: Prior to screening of candidates, the NJEA PAC officers shall confer with the Director of the Government Relations Division for the purpose of reviewing candidates running in that year's primary and/or general election and in prioritizing the criteria for screening committees to use when evaluating candidates for endorsement. Information resulting from this discussion shall be provided to the members of the NJEA PAC Operating Committee representing the districts of the candidates. Where information is to be provided, a meeting with the NJEA PAC Operating Committee members representing the district and an NJEA Government Relations staff member shall be held. The information resulting from the review about a candidate shall not be provided in writing.

B. QUESTIONNAIRE: NJEA PAC shall provide a questionnaire to all major party candidates. Completed questionnaires returned to NJEA PAC shall be forwarded to the chair of each screening committee.

C. REPRESENTATION: Representation on screening committees shall be proportional to the population of the counties included within the legislative district. For the population of each district, the part of each county's population in that district shall be computed to the nearest hundredth and the result multiplied by ten. Representation on the screening committee shall be based on that ratio rounded off to the nearest whole number with each county guaranteed a minimum of one member. (See Appendices: County Member Representation on NJEA PAC Screening Committees in NJ Legislative Districts).

D. SELECTION OF SCREENING CHAIR: The NJEA PAC Chairperson shall appoint, and the NJEA PAC Board of Trustees shall approve a chairperson for each screening Committee. The chairperson of a screening committee in a legislative race shall be a Government Relations Committee member from the county with the greatest proportion of population in the legislative district or his/her designee.

E. INVITATIONS TO ATTEND THE SCREENING MEETING: The chair of the screening committee shall invite all individuals eligible to attend the screening from his/her county: members of the NJEA PAC Operating Committee, presidents of all active and active supportive affiliates, the president and legislative chair of the NJ Retired Educators Association county affiliate, and a UniServ representative from a regional office in the district.

When a legislative district covers more than one county, the chair shall inform the County Presidents of all other counties in the legislative district of the screening meeting. It shall be the responsibility of the County Presidents to invite all individuals eligible to attend the screening from their county as listed above.

The chairperson shall appoint members to the committee as indicated below, based on the appropriate representation. (See Appendix County Member Representation) Those individuals who are not appointed to

the committee will be permitted to provide input to the screening committee but will have no vote, nor may they question the candidate.

F. COMPOSITION OF THE SCREENING COMMITTEE: All members of the screening committee shall have one vote. The committee shall be as follows:

1. *NJREA member*: The NJREA Legislative County Chairperson or his/her designee approved by the NJREA President. In districts serving portions of more than one county, the senior NJREA chairperson representing the greatest proportion of population within the district shall be the designee.
2. *Members of the PAC Operating Committee*: Whenever a county is allotted less than the number of NJEA PAC Operating Committee members from that county on a district screening committee, selection shall be made in the order of preference as follows:
 - a. NJEA Government Relations Committee member(s). In those counties having more than one Government Relations Committee member, selection shall be based on seniority.
 - b. NJEA Congressional Contact Committee member(s). In those counties having more than one Congressional Contact committee member, selection shall be based on seniority.
 - c. County president.
 - d. NJEA Executive Committee member(s). In those counties having more than one Executive Committee member, selection shall be based on seniority.
 - e. At-large members of the PAC Operating Committee

PAC Operating Committee members cannot send alternates to a screening meeting.

3. *Additional members as needed*: Local presidents of school districts contained in the legislative district or their designated vice-president or county legislative action team member. Presidents or their designees from districts that serve the entire county, or community college associations, can serve on any screening committee that includes their county.

III. **Screening Candidates for Endorsement in Primary or General Elections**

A. PURPOSE: The screening committee shall act as an ad hoc committee for the purpose of reviewing candidates.

B. QUORUM: A quorum for the purpose of conducting the business of a screening committee shall be a majority of the total eligible membership.

C. CANDIDATE INCLUSION: Every reasonable effort shall be made to screen all candidates seeking the office for which an endorsement has been requested. All major party candidates for the same position shall be contacted by the chairperson of NJEA PAC by mail, phone, and/or e-mail requesting the candidates' positions on NJEA issues.

D. INDEPENDENT CANDIDATES: Independent candidates shall be mailed a letter by the NJEA PAC chairperson by mail requesting their philosophy on public education in writing. The appropriate screening committee chair shall be authorized to determine if a screening committee interview is justified upon the receipt of the written reply from the independent candidate.

E. INVITING CANDIDATES TO THE SCREENING: The chairperson of the screening committee shall contact major party candidates by mail, phone, and/or e-mail to offer them the opportunity to meet with the screening committee.

F. CONSIDERING CANDIDATE'S VIEWS: The screening committee shall discuss the candidate's completed questionnaire with the candidate at the screening committee or, if necessary, by teleconference. If the questionnaire has not been returned prior to the screening meeting, the chairperson can use a blank questionnaire to guide the discussion with the candidate at the screening meeting. While it is preferable to discuss the questionnaire with the candidate, a screening committee can use a completed questionnaire as the basis for making a recommendation to endorse.

G. CANDIDATE PARTICIPATION NECESSARY FOR ENDORSEMENT: A screening committee shall not recommend a candidate for endorsement unless that candidate has participated in the endorsement process by either submitting a completed questionnaire or participating in an interview with a screening committee.

H. EVALUATING CANDIDATES: When evaluating candidates, screening committees shall consider the following criteria, where applicable:

1. Electability – considerations must include political demographics of the district, ability of the candidate to raise funds, the support of other organizations and/or political parties, campaign organization, strategy to win, and adequacy of other resources
2. Voting records of incumbents or any legislative record of non-incumbents
3. Views concerning public education and labor
4. Positions on issues which have not come to vote
5. Accessibility - if able to be assessed based on past experience with the candidate
6. Leadership positions
7. Committee Assignments
8. Sponsorship of pro-public education and/or pro-labor legislation
9. Leadership on legislative issues on the floor, in committee, in caucuses or other advocacy behind the scenes in the Legislature

Relevant information on the above criteria shall be provided by the NJEA PAC officers and the Government Relations staff to the screening committee prior to recommendation consideration. The screening committee shall consider this information.

I. MEMBER CANDIDATES: NJEA member candidates requesting NJEA PAC support shall be evaluated on the same basis as any other candidate seeking endorsement.

J. INCLUDING VIEWS OF LOCAL ASSOCIATIONS: Every reasonable effort shall be made to ascertain the reaction of local associations within the district. These reactions shall be reflected in the screening committee's report to the NJEA PAC Operating Committee.

K. SCREENING COMMITTEE RECOMMENDATION: The screening committee may recommend the following:

1. Endorsement of one candidate in a race, signifying that the candidate meets the standards set forth in the NJEA PAC Guidelines.
2. No endorsement of either candidate in a race signifying that neither candidate meets the NJEA PAC Guidelines. In this case, NJEA members are discouraged from working on behalf of either candidate.
3. "Your choice" option signifying that both candidates are in agreement with NJEA goals and positions. Each candidate may receive and be limited to appropriate publicity in NJEA publications and equal NJEA PAC financial contributions, in accordance with procedures already established in the NJEA PAC Guidelines. In this case, NJEA members are encouraged to work on behalf of the candidate(s) of their choice.

L. SCREENING COMMITTEE VOTE: Recommendations of candidates shall be by majority vote of the screening committee members present and voting. Only voting members may be present during the vote of the screening committee. All deliberations and proceedings regarding candidates shall be kept confidential.

M. VOTE: At any meeting of the NJEA PAC Operating Committee at which endorsement of candidates is proposed, members representing the screening committee shall be bound by their vote.

N. TIMELINE: All screening committees shall complete their screening process fourteen (14) days before the NJEA PAC endorsement meeting. The Chairperson shall complete the screening recommendation report and return it to NJEA (10) days before the NJEA PAC Operating Committee meeting.

CHAPTER 3

Congressional Campaign

U.S. House of Representatives

NJEA PAC is not a federal PAC. The process contained herein is designed solely for providing recommendations for consideration by the relevant National Education Association Political Action Committee organized for the purpose of endorsing and supporting federal candidates.

I. NJEA PAC Recommendation for Endorsement for Primary or General Elections

A. REQUESTS FOR ENDORSEMENT: A county or local association, an individual NJEA member, a candidate, or a political party may request the endorsement of a candidate from NJEA PAC. All requests for endorsement shall be sent in writing to the NJEA PAC chairperson.

B. SEPARATE ENDORSEMENTS: Any action taken by the NJEA PAC Operating Committee in support of a candidate(s) in either or both political party primary elections shall, in no way, infringe on the screening process for the general election, unless covered by the appropriate NEA Political Action Committee policy.

C. PRIORITY OF RACES FOR POTENTIAL CANDIDATE RECOMMENDATIONS FOR ENDORSEMENT: The NJEA PAC officers shall select candidates to be screened for an NJEA PAC recommendation for endorsement on the following priority basis:

1. Races in which consistent and proven supporters and “friends” of education are facing difficulty in returning to office
2. Races in which consistent adversaries are opposed by a candidate who is in agreement with NJEA goals and positions and who has a good possibility of winning
3. Races in which consistent and proven supporters and “friends” of education face no serious opposition in returning to office
4. Races where there is no incumbent and in which one candidate is clearly more in agreement with NJEA goals and positions and has a reasonable possibility of winning
5. Other races in which NJEA and the NEA PAC may have an interest

The NJEA PAC chair shall refer requests to the appropriate screening committee.

D. APPROVAL OF SCREENING COMMITTEE REQUIRED: The NJEA PAC Operating Committee shall not recommend the endorsement or approve support of any candidate without the recommendation or approval of an appropriate screening committee.

E. MAJORITY REQUIRED: Recommendation of endorsement of candidates shall be by majority vote of those members of the NJEA PAC Operating Committee present and voting.

F. COMPLAINTS: Any complaints concerning the operations of NJEA PAC by either candidates or members shall be made in writing to the NJEA PAC chairperson.

G. NOTIFICATION OF CANDIDATES: Every candidate screened shall be notified of the final endorsement outcome pursuant to the appropriate NEA PAC policies.

H. APPEALS: No action of the NJEA PAC Operating Committee shall be appealed to the NJEA PAC Board of Trustees except in the case of a request by NJEA member(s) for a rescission of an endorsement based on information not presented at the NJEA PAC Operating Committee meeting at which the recommendation for endorsement in question was approved.

I. ENDORSEMENT RECOMMENDATIONS: All endorsement recommendations shall be provided to the appropriate NEA PAC fund using the processes in place by such fund.

J. BENEFITS OF ENDORSEMENT:

Endorsement may take the form of:

1. A public statement of support which shall only be made with a candidate's written consent.
2. Publicity in NJEA publications
3. Encouraging NJEA members to volunteer on behalf of the endorsed candidate
4. Financial assistance from the NEA PAC Fund
5. Independent expenditures that are uncoordinated with the candidate campaign
6. Opportunities to meet and speak with NJEA members

Once the NEA PAC has made its endorsements for a specific election cycle, NJEA PAC shall not provide any of the benefits of endorsement listed in section I to candidates who have not been endorsed.

II. **Preparing for the Screening Meeting**

A. CONFERENCE: Prior to screening of candidates, the NJEA PAC officers shall confer with the Director of the Government Relations Division for the purpose of reviewing candidates running in that year's primary and/or general election and in prioritizing the criteria for screening committees to use when evaluating candidates for endorsement. Information resulting from this discussion shall be provided to the members of the NJEA PAC Operating Committee representing the districts of the candidates. Where information is to be provided, a meeting with the NJEA PAC Operating Committee members representing the district and an NJEA Government Relations staff member shall be held. The information resulting from the review about a candidate shall not be provided in writing.

B. QUESTIONNAIRE: NJEA PAC shall provide the appropriate NEA PAC questionnaire to all major party candidates. Completed questionnaires returned to NJEA PAC shall be forwarded to the chair of each screening committee.

C. REPRESENTATION: Representation on screening committees shall be proportional to the population of the counties included within the congressional district. For the population of each district, the part of each county's population in that district shall be computed to the nearest hundredth and the result multiplied by ten. Representation on the screening committee shall be based on that ratio rounded off to the nearest whole number with each county guaranteed a minimum of one member.

(See Appendices: County Member Representation on NJEA PAC Screening Committees in NJ Congressional Districts).

D. SELECTION OF SCREENING CHAIR: The NJEA PAC Chairperson shall appoint, and the NJEA PAC Board of Trustees shall approve a chairperson for each screening committee. The chairperson of a screening committee in a congressional race shall be a Congressional Contact Committee member from the county with the greatest proportion of population in the congressional district or his/her designee.

E. INVITATIONS TO ATTEND THE SCREENING MEETING: The chair of the screening committee shall invite all individuals eligible to attend the screening from his/her county: members of the NJEA PAC Operating Committee, presidents of all active and active supportive affiliates, the president and legislative chair of the NJ Retired Educators Association county affiliate, and a UniServ representative from a regional office in the district.

When a congressional district covers more than one county, the chair shall inform the County Presidents of all other counties in the congressional district of the screening meeting. It shall be the responsibility of the County Presidents to invite all individuals eligible to attend the screening from their county as listed above.

The chairperson shall appoint members to the committee as indicated below, based on the appropriate representation. (See Appendix County Member Representation) Those individuals who are not appointed to the committee will be permitted to provide input to the screening committee but will have no vote, nor may they question the candidate.

F. COMPOSITION OF THE SCREENING COMMITTEE: All members of the screening committee shall have one vote. The committee shall be as follows:

1. *NJREA member*: The NJREA Legislative County Chairperson or his/her designee approved by the NJREA President. In districts serving portions of more than one county, the senior NJREA chairperson representing the greatest proportion of population within the district shall be the designee.
2. *Members of the PAC Operating Committee*: Whenever a county is allotted less than the number of NJEA PAC Operating Committee members from that county on a screening committee, selection shall be made in the order of preference as follows:
 - a. NJEA Congressional Contact Committee member(s). In those counties having more than one Congressional Contact committee member, selection shall be based on seniority.
 - b. NJEA Government Relations Committee member(s). In those counties having more than one Government Relations Committee member, selection shall be based on seniority.
 - c. County president.
 - d. NJEA Executive Committee member(s). In those counties having more than one Executive Committee member, selection shall be based on seniority.
 - e. At-large members of the PAC Operating Committee

PAC Operating Committee members cannot send alternates to a screening meeting.

3. *Additional members as needed*: Local presidents of school districts contained in the congressional district or their designated vice-president or county legislative action team member. Presidents or their designees from districts that serve the entire county, or community college associations, can serve on any screening committee that includes their county.

III. **Screening Candidates for a Recommendation for Endorsement in Primary or General Elections**

- A. PURPOSE: The screening committee shall act as an ad hoc committee for the purpose of reviewing candidates.
- B. QUORUM: A quorum for the purpose of conducting the business of a screening committee shall be a majority of the total eligible membership.
- C. CANDIDATE INCLUSION: Every reasonable effort shall be made to screen all candidates seeking the office for which an endorsement has been requested. All major party candidates for the same position shall be contacted by the chairperson of NJEA PAC by mail, phone, and/or e-mail requesting the candidates' positions on NJEA issues.
- D. INDEPENDENT CANDIDATES: Independent candidates shall be mailed a letter by the NJEA PAC chairperson by mail requesting their philosophy on public education in writing. The appropriate screening committee chair shall be authorized to determine if a screening committee interview is justified upon the receipt of the written reply from the independent candidate.

E. INVITING CANDIDATES TO THE SCREENING: The chairperson of the screening committee shall contact major party candidates by mail, phone, and/or e-mail to offer them the opportunity to meet with the screening committee.

F. CONSIDERING CANDIDATE'S VIEWS: The screening committee shall discuss the candidate's completed questionnaire with the candidate at the screening committee or, if necessary, by teleconference. If the questionnaire has not been returned prior to the screening meeting, the chairperson can use a blank questionnaire to guide the discussion with the candidate at the screening meeting and complete the questionnaire. While it is preferable to discuss the questionnaire with the candidate, a screening committee can use a completed questionnaire as the basis for making a recommendation to endorse.

G. CANDIDATE PARTICIPATION NECESSARY FOR ENDORSEMENT: A screening committee shall not recommend a candidate for endorsement unless that candidate has participated in the endorsement process by either submitting a completed questionnaire or participating in an interview with a screening committee.

H. EVALUATING CANDIDATES: When evaluating candidates, screening committees shall consider the following criteria, where applicable, and any other relevant criteria provided by the NEA PAC:

1. Electability – considerations must include political demographics of the district, ability of the candidate to raise funds, the support of other organizations and/or political parties, campaign organization, strategy to win, and adequacy of other resources
2. Voting records of incumbents or any legislative record of non-incumbents
3. Views concerning public education and labor
4. Positions on issues which have not come to vote
5. Accessibility - if able to be assessed based on past experience with the candidate
6. Leadership positions
7. Committee Assignments
8. Sponsorship of pro-public education and/or pro-labor legislation
9. Leadership on legislative issues on the floor, in committee, in caucuses or other advocacy behind the scenes in Congress
10. Other relevant criteria provided by the NEA PAC fund

Relevant information on the above criteria shall be provided by the NJEA PAC officers and the Government Relations staff to the screening committee prior to recommendation consideration. The screening committee shall consider this information.

I. MEMBER CANDIDATES: NJEA member candidates requesting NJEA PAC support shall be evaluated on the same basis as any other candidate seeking endorsement.

J. INCLUDING VIEWS OF LOCAL ASSOCIATIONS: Every reasonable effort shall be made to ascertain the reaction of local associations within the district. These reactions shall be reflected in the screening committee's report to the NJEA PAC Operating Committee.

K. SCREENING COMMITTEE RECOMMENDATION: The screening committee may recommend the following:

1. Endorsement of one candidate in a race, signifying that the candidate meets the standards set forth in the NJEA PAC Guidelines.
2. No endorsement of either candidate in a race signifying that neither candidate meets the NJEA PAC Guidelines. In this case, NJEA members are discouraged from working on behalf of either candidate.
3. "Your choice" option signifying that both candidates are in agreement with NJEA goals and positions. Each candidate may receive and be limited to appropriate publicity in NJEA publications and equal NEA PAC financial contributions, in accordance with procedures already established in NEA PAC guidelines. In this case, NJEA members are encouraged to work on behalf of the candidate(s) of their choice.

L. SCREENING COMMITTEE VOTE: Recommendations of candidates shall be by majority vote of the screening committee members present and voting. Only voting members may be present during the vote of the screening committee. All deliberations and proceedings regarding candidates shall be kept confidential.

M. BINDING VOTE: At any meeting of the NJEA PAC Operating Committee at which recommendation of an endorsement of candidates is proposed, members representing the screening committee shall be bound by the decision of the screening committee as a whole.

N. TIMELINE: All screening committees shall complete their screening process and come to a conclusion fourteen (14) days before the NJEA PAC endorsement meeting. The Chairperson shall complete the screening recommendation report and return it to NJEA (10) days before the NJEA PAC Operating Committee meeting.

CHAPTER 4 Gubernatorial Campaign

I. NJEA PAC Endorsement for Primary or General Elections

A. INITIATING SCREENING: In each year in which there is an election for the Governor, the NJEA PAC Operating Committee may consider screening candidates in either or both political party primary elections upon the recommendation of the NJEA PAC officers and a two-thirds vote of those members of the NJEA PAC Board of Trustees present and voting.

B. SCREENING PROCEDURES: If the NJEA PAC Board of Trustees votes to initiate the screening process for a primary endorsement, the NJEA PAC chairperson shall implement the screening procedures as detailed in these guidelines.

C. SEPARATE ENDORSEMENTS: Any action taken by the NJEA PAC Operating Committee in support of candidates in either or both political party primary elections shall, in no way, infringe on the screening process for the general election.

D. APPROVAL OF SCREENING COMMITTEE REQUIRED: The NJEA PAC Operating Committee shall not endorse or approve support of any candidate without the recommendation or approval of a gubernatorial screening committee.

E. MAJORITY REQUIRED: Endorsement of candidates shall be by majority vote of those members of the NJEA PAC Operating Committee present and voting.

F. COMPLAINTS: Any complaints concerning the operations of NJEA PAC by either candidates or members shall be made in writing to the NJEA PAC chairperson.

G. NOTIFICATION OF CANDIDATES: Every candidate screened shall be notified by the NJEA PAC chairperson of the decisions of the NJEA PAC Operating Committee.

H. APPEALS: No action of the NJEA PAC Operating Committee shall be appealed to the NJEA PAC Board of Trustees except in the case of a request by NJEA member(s) for a rescission of an endorsement based on information not presented at the NJEA PAC Operating Committee meeting at which the endorsement in question was approved.

I. BENEFITS OF ENDORSEMENT:

Endorsement may take the form of:

1. A public statement of support which shall only be made with a candidate's written consent
2. Publicity in NJEA publications
3. Encouraging NJEA members to volunteer on behalf of the endorsed candidate
4. Financial assistance
5. Independent expenditures that are uncoordinated with the candidate campaign
6. Opportunities to meet and speak with NJEA members

II. Preparing for the Screening Meeting

A. THE GUBERNATORIAL SCREENING COMMITTEE: NJEA PAC shall establish a gubernatorial screening committee of eleven (11) members. All members shall have one vote. The chairperson of the gubernatorial screening committee shall be the NJEA PAC chair or his/her designee.

The gubernatorial screening committee shall be composed of the NJEA PAC officers, the chair of the NJEA Government Relations Committee, the NJREA legislative chairperson, an NJEA active supportive member appointed by the NJEA PAC chairperson and five (5) members to be selected by the NJEA PAC Board of Trustees from the NJEA PAC Operating Committee representing geographic areas of the state and the major political parties within the state.

B. OBSERVERS: Two representatives from each of the following groups: 21 county affiliates, Higher Education, ESP, Non-Classroom, Pre-Service, and Retired shall be invited to attend the gubernatorial screening as observers. Observers will be permitted to provide input to the screening committee, but will have no vote.

Selection of observers from each of the 21 county affiliates shall be made in the order of preference as follows:

1. County President
2. NJEA Government Relations Committee member. In those counties having more than one Government Relations Committee member, selection shall be based on seniority.
3. NJEA Congressional Contact Committee member. In those counties having more than one Congressional Contact Committee member, selection shall be based on seniority.
4. NJEA Executive Committee member. In those counties having more than one Executive Committee member, selection shall be based on seniority.

Selection of the observer from Higher Education, ESP and Non-Classroom shall be made in the order of preference as follows:

1. NJEA Executive Committee member
2. NJEA Government Relations Committee member
3. NJEA Congressional Contact Committee member
4. NJEA Delegate Assembly representatives, selection shall be based on seniority.

Selection of observers from Retired and Pre-Service shall be made in the order of preference as follows:

1. State President
2. State Vice President
3. NJEA Government Relations Committee member, if applicable
4. NJEA Congressional Contact Committee member, if applicable
5. NJEA Delegate Assembly representatives, selection shall be based on seniority.

III. Screening the Candidates for Primary or General Elections

A. PURPOSE: The screening committee shall act as an ad hoc committee for the purpose of reviewing candidates.

B. QUORUM: A quorum for the purpose of conducting the business of a screening committee shall be a majority of the total eligible membership.

C. CANDIDATE INCLUSION: Every reasonable effort shall be made to screen all candidates in the gubernatorial race. All major party candidates shall be contacted by the chairperson of NJEA PAC by mail, phone, and/or e-mail requesting the candidates' positions on NJEA issues.

D. INDEPENDENT CANDIDATES: Independent candidates shall be mailed a letter by the NJEA PAC chairperson by mail requesting their philosophy on public education in writing. The NJEA PAC chair shall determine if a screening committee interview is justified upon the receipt of the written reply from the independent candidate.

E. INVITING CANDIDATES TO THE SCREENING: The NJEA PAC chair shall contact major party candidates by mail, phone, and/or e-mail to offer them the opportunity to meet with the screening committee.

F. CONSIDERING CANDIDATE VIEWS: The screening committee shall discuss the candidate's completed questionnaire with the candidate at the screening committee or, if necessary, by teleconference. If the questionnaire has not been returned prior to the screening meeting, the chairperson can use a blank questionnaire to guide the discussion with the candidate at the screening meeting. While it is preferable to discuss the questionnaire with the candidate, a screening committee can use a completed questionnaire as the basis for making a recommendation to endorse.

G. CANDIDATE PARTICIPATION NECESSARY FOR ENDORSEMENT: A screening committee shall not recommend a candidate for endorsement unless that candidate has participated in the endorsement process by either submitting a completed questionnaire or participating in an interview with a screening committee.

H. EVALUATING CANDIDATES: When evaluating candidates, the screening committees shall consider the following criteria, where applicable:

1. Electability – considerations must include political demographics, ability of the candidate to raise funds, the support of other organizations and/or political party, campaign organization, strategy to win, and adequacy of other resources
2. Voting records of incumbents or any legislative record of non-incumbents
3. Views concerning public education and labor
4. Positions on issues which have not come to vote
5. Accessibility - if able to be assessed based on past experience with the candidate
6. Record on education and labor issues, if one exists.

Relevant information on the above criteria shall be provided by the NJEA PAC chair to the screening committee prior to recommendation consideration. The screening committee shall consider this information.

I. MEMBER CANDIDATES: NJEA member candidates requesting NJEA PAC support shall be evaluated on the same basis as any other candidate seeking endorsement.

J. SCREENING COMMITTEE RECOMMENDATION: The screening committee may recommend the following:

1. Endorsement of one candidate in a race, signifying that the candidate meets the standards set forth in the NJEA PAC Guidelines.
2. No endorsement of either candidate in a race signifying that neither candidate meets the NJEA PAC Guidelines. In this case, NJEA members are discouraged from working on behalf of either candidate.
3. "Your choice" option signifying that both candidates are in agreement with NJEA goals and positions. Each candidate may receive and be limited to appropriate publicity in NJEA publications and equal NJEA PAC financial contributions, in accordance with procedures already established in the NJEA PAC Guidelines. In this case, NJEA members are encouraged to work on behalf of the candidate(s) of their choice.

K. SCREENING COMMITTEE VOTE: Recommendations of candidates shall be by majority vote of the screening committee members present and voting. All deliberations and proceedings regarding candidates shall be kept confidential.

L. BINDING VOTE: At any meeting of the NJEA PAC Operating Committee at which endorsement of candidates is proposed, members representing the screening committee shall be bound by the decision of the screening committee as a whole.

M. TIMELINE: All screening committees shall complete their screening process fourteen (14) days before the NJEA PAC endorsement meeting. The Chairperson shall complete the screening recommendation report and return it to NJEA (10) days before the NJEA PAC Operating Committee meeting.

CHAPTER 5

U.S. Senate Campaign

NJEA PAC is not a federal PAC. The process contained herein is designed solely for providing recommendations for consideration by the relevant National Education Association Political Action Committee organized for the purpose of endorsing and supporting federal candidates.

I. NJEA PAC Recommendation for Endorsement for Primary or General Elections

A. INITIATING SCREENING: In each year in which there is an election for the U.S. Senate, the NJEA PAC Operating Committee may consider screening candidates in either or both political party primary elections upon the recommendation of the NJEA PAC officers and a two-thirds vote of those members of the NJEA PAC Board of Trustees present and voting.

B. SCREENING PROCEDURE: If the NJEA PAC Board of Trustees votes to initiate the screening process for a primary endorsement, the NJEA PAC chairperson shall implement the screening procedures as detailed in these guidelines.

C. SEPARATE ENDORSEMENTS: Any action taken by the NJEA PAC Operating Committee in support of candidates in either or both political party primary elections shall, in no way, infringe on the screening process for the general election, covered by the appropriate NEA Political Action Committee policy.

D. APPROVAL OF SCREENING COMMITTEE REQUIRED: The NJEA PAC Operating Committee shall not recommend endorsement or approve support of any candidate without the recommendation or approval of a senatorial screening committee.

E. MAJORITY REQUIRED: Recommendation for endorsement of candidates shall be by majority vote of those members of the NJEA PAC Operating Committee present and voting.

F. COMPLAINTS: Any complaints concerning the operations of NJEA PAC by either candidates or members shall be made in writing to the NJEA PAC chairperson.

G. NOTIFICATION OF CANDIDATES: Every candidate screened shall be notified of the final endorsement outcome pursuant to the appropriate NEA PAC policies.

H. APPEALS: No action of the NJEA PAC Operating Committee shall be appealed to the NJEA PAC Board of Trustees except in the case of a request by NJEA member(s) for a rescission of an endorsement based on information not presented at the NJEA PAC Operating Committee meeting at which the endorsement in question was approved.

I. BENEFITS OF ENDORSEMENT:

Endorsement may take the form of:

1. A public statement of support which shall only be made with a candidate's written consent
2. Publicity in NJEA publications
3. Encouraging NJEA members to volunteer on behalf of the endorsed candidate
4. Financial assistance from the NEA PAC
5. Independent expenditures that are uncoordinated with the candidate campaign
6. Opportunities to meet and speak with NJEA members

II. Preparing for the Screening Meeting

A. THE SENATORIAL SCREENING COMMITTEE: NJEA PAC shall establish a senatorial screening committee of eleven (11) members. All members shall have one vote. The chairperson of the senatorial screening committee shall be the NJEA PAC chair or his/her designee.

The senatorial screening committee shall be composed of the NJEA PAC officers, the chair of the NJEA Congressional Contact Committee, the NJEA legislative chairperson, an NJEA active supportive member appointed by the NJEA PAC chairperson and five (5) members to be selected by the NJEA PAC Board of Trustees from the NJEA PAC Operating Committee representing geographic areas of the state and the major political parties within the state.

B. OBSERVERS: Two representatives from each of the following groups: 21 county affiliates, Higher Education, ESP, Non-Classroom, Pre-Service, and Retired shall be invited to attend the gubernatorial screening as observers. Observers will be permitted to provide input to the screening committee, but will have no vote.

Selection of observers from each of the 21 county affiliates shall be made in the order of preference as follows:

1. County President
2. NJEA Congressional Contact Committee member. In those counties having more than one Congressional Contact Committee member, selection shall be based on seniority.
3. NJEA Government Relations Committee member. In those counties having more than one Government Relations Committee member, selection shall be based on seniority.
4. NJEA Executive Committee member. In those counties having more than one Executive Committee member, selection shall be based on seniority.

Selection of the observers from Higher Education, ESP and Non-Classroom shall be made in the order of preference as follows:

1. NJEA Executive Committee member
2. NJEA Congressional Contact Committee member
3. NJEA Government Relations Committee member
4. NJEA Delegate Assembly representatives, selection shall be based on seniority.

Selection of observers from Retired and Pre-Service shall be made in the order of preference as follows:

1. State President
2. State Vice President
3. NJEA Congressional Contact Committee member, if applicable
4. NJEA Government Relations Committee member, if applicable
5. NJEA Delegate Assembly representatives, selection shall be based on seniority.

III. Screening the Candidates for Primary or General Elections

A. PURPOSE: The screening committee shall act as an ad hoc committee for the purpose of reviewing candidates.

B. QUORUM: A quorum for the purpose of conducting the business of a screening committee shall be a majority of the total eligible membership.

C. CANDIDATE INCLUSION: Every reasonable effort shall be made to screen all candidates in the senatorial race. All major party candidates shall be contacted by the chairperson of NJEA PAC by mail, phone, and/or e-mail requesting the candidates' positions on NJEA issues.

D. INDEPENDENT CANDIDATES: Independent candidates shall be mailed a letter by the NJEA PAC chairperson by mail requesting their philosophy on public education in writing. The NJEA PAC chair shall determine if a screening committee interview is justified upon the receipt of the written reply from the independent candidate.

E. INVITING CANDIDATES TO THE SCREENING: The NJEA PAC chair shall contact major party candidates by mail, phone, and/or e-mail to offer them the opportunity to meet with the screening committee.

F. CONSIDERING CANDIDATE'S VIEWS: The screening committee shall discuss the candidate's completed questionnaire with the candidate at the screening committee or, if necessary, by teleconference. If the questionnaire has not been returned prior to the screening meeting, the chairperson can use a blank questionnaire to guide the discussion with the candidate at the screening meeting. While it is preferable to discuss the questionnaire with the candidate, a screening committee can use a completed questionnaire as the basis for making a recommendation to endorse.

G. CANDIDATE PARTICIPATION NECESSARY FOR ENDORSEMENT: A screening committee shall not recommend a candidate for endorsement unless that candidate has participated in the endorsement process by either submitting a completed questionnaire or participating in an interview with a screening committee.

H. EVALUATING CANDIDATES: When evaluating candidates, the screening committees shall consider the following criteria, where applicable, and any other relevant criteria provided by the NEA PAC:

1. Electability – considerations must include political demographics of the district, ability of the candidate to raise funds, the support of other organizations and/or political party, campaign organization, strategy to win, and adequacy of other resources
2. Voting records of incumbents or any legislative record of non-incumbents
3. Views concerning public education and labor
4. Positions on issues which have not come to vote
5. Accessibility - if able to be assessed based on past experience with the candidate
6. Leadership positions
7. Committee Assignments
8. Sponsorship of pro-public education and/or pro-labor legislation
9. Leadership on legislative issues on the floor, in committee, in caucuses or other advocacy behind the scenes in Congress
10. Other relevant criteria provided by the NEA PAC fund

Relevant information on the above criteria shall be provided by the NJEA PAC officers and the Government Relations staff to the screening committee prior to recommendation consideration. The screening committee shall consider this information.

I. MEMBER CANDIDATES: NJEA member candidates requesting NJEA PAC support shall be evaluated on the same basis as any other candidate seeking endorsement.

J. SCREENING COMMITTEE RECOMMENDATION: The screening committee may recommend the following:

1. Endorsement of one candidate in a race, signifying that the candidate meets the standards set forth in the NJEA PAC Guidelines.
2. No endorsement of either candidate in a race signifying that neither candidate meets the NJEA PAC Guidelines. In this case, NJEA members are discouraged from working on behalf of either candidate.
3. "Your choice" option signifying that both candidates are in agreement with NJEA goals and positions. Each candidate may receive and be limited to appropriate publicity in NJEA publications and equal NEA PAC financial contributions, in accordance with procedures already established in the NJEA PAC guidelines. In this case, NJEA members are encouraged to work on behalf of the candidate(s) of their choice.

K. SCREENING COMMITTEE VOTE: Recommendations of candidates shall be by majority vote of the screening committee members present and voting. All deliberations and proceedings regarding candidates shall be kept confidential.

L. BINDING VOTE: At any meeting of the NJEA PAC Operating Committee at which endorsement of candidates is proposed, members representing the screening committee shall be bound by the decision of the screening committee as a whole.

M. TIMELINE: All screening committees shall complete their screening process fourteen (14) days before the NJEA PAC endorsement meeting. The Chairperson shall complete the screening recommendation report and return it to NJEA (10) days before the NJEA PAC Operating Committee meeting.

CHAPTER 6

Local and County Campaigns

- A. **FUNDS:** 10% of the NJEA PAC contributions from the prior year at the state level will be reserved for use in county and local races that county and local associations determine to have an impact on public education, public schools, and/or the rights of NJEA members. The NJEA PAC chair shall have the discretion to disburse these funds according to the procedures outlined below.
- B. **FUNDRAISERS:** If a county or local association wishes to attend a fundraiser, the association shall submit its request to the NJEA PAC chair. The request shall include a copy of the fundraiser invitation, the names of attendees, and the reason for attending the fundraiser.
- C. **CONTRIBUTIONS TO ENDORSED CANDIDATES:** At a minimum, a county or local association that wishes to endorse candidates must follow the following procedure:
1. The association must agree that it wishes to consider endorsing candidates. This should be shown in the minutes of a rep council or general membership meeting.
 2. The association must create guidelines for endorsing candidates that are in writing. The association must follow, and be cognizant of, all New Jersey election rules and procedures.
 3. These guidelines must be voted on by a governing body of the association. The guidelines shall include the steps below. (See sample in forms)
 - a. A trigger for the endorsement process, including a vote by a governing body of the association to screen candidates in that particular election.
 - b. Assurance that all major candidates for the position will be screened.
 - c. An explanation of who will serve on the screening committee and how the members of the committee are chosen, ensuring that there is representation across the spectrum of members of the association.
 - d. The level of participation required of the candidate (in-person meeting? questionnaire?)
 - e. The list of criteria to be considered in the screening process.
 - f. The benefits of the endorsement to the candidate.
 - g. How the endorsement decision will be made.
 - h. A reminder about the confidentiality of the proceedings.

If an association wishes to request financial assistance for an endorsed candidate, the association must submit a letter to the NJEA PAC chair with the following information:

- a. Name of candidate, campaign account name, and candidate contact information
- b. Why the association feels it is important to get involved in the race
- c. An outline of the process used to endorse the candidate, along with any supporting documentation
- d. An explanation why the association endorsed the candidate
- e. The request for financial assistance

In any race which might have an impact on any other local association(s), the association making the request must demonstrate that it made every effort to include the other association(s) in its endorsement process.

CHAPTER 7
Forms

- 1. PAC Operating Committee Alternate Authorization***
- 2. Screening Report to NJEA PAC (2 pages)***
- 3. Candidate Recommendation Report (2 pages)***
- 4. Dates to Remember for Elections***
- 5. Sample Screening Process for Local Campaigns***
- 6. Sample Screening Process for County Campaigns***

Please FAX to: 609-394-3355

**NEW JERSEY EDUCATION ASSOCIATION
180 West State Street
Trenton, New Jersey 08607**

PAC OPERATING COMMITTEE ALTERNATE AUTHORIZATION

This is to certify that I, _____, a member of the PAC Operating Committee from _____ County or Unit will not be able to attend the NJEA PAC Operating Committee on _____ and do hereby authorize _____, a member of the NJEA from my county or unit, to represent me, vote, and speak on my behalf for this meeting only.

PAC Operating Committee Member

Date

SCREENING COMMITTEE REPORT TO NJEA PAC OPERATING COMMITTEE

The screening committee reviewed candidates for the New Jersey District # _____ on (date) _____ at
(location) _____

OFFICE	CANDIDATE NAME	PARTY	RECOMMENDATION	COMMITTEE VOTE
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—
_____	_____	_____	_____	—

Reactions from observers:

Signed _____
Chairperson of Screening Committee (Member of NJEA PAC Operating Committee)

Date _____

Director, Government Relations

Date _____

NAME	COUNTY	POSITION	NJEA MEMBER ID	CELL PHONE
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.		RETIREE		
12.				
13.				

NOTE: 12 MEMBERS FOR LDs 9, 15, 25, and 40; ONLY CDs 1, 7, 8, and 9; 13 MEMBERS FOR CD 2 ONLY.

Please list the names of any observers present:

Please return the completed Screening Committee report and Candidate Recommendation Reports to NJEA Government Relations by (DATE).

CANDIDATE RECOMMENDATION REPORT

*Complete this sheet for **each** candidate screened by the committee*

Candidate _____

Party _____ **House** _____

Screening Committee's recommendation:

Endorse candidate No Endorsement Your choice

Criteria for Recommendation:

a) Voting Record (Good? Bad? Anything that stands out?)

b) Electability (Incumbent? Terms in office? Party support? Finances? Polling?)

c) Accessibility (Meets with members? GR staff? Comes to events?)

d) Positions on issues which have not yet come for a vote

e) Leadership / Committee Positions

Candidate's Campaign

Committee Name: _____

Campaign Address: _____

Campaign Headquarters Phone number: _____

If recommendation is to endorse, name the contact who will organize the NJEA campaign at the county level.

Name: _____

Address: _____

Phone number: _____

Date: _____

Dates to Remember for Elections

57 days before primary election	Deadline for nomination petitions for primary elections before 4p.m.
21 days before the primary election	Voter registration deadline for primary elections
7 days before the primary election	Vote-by-mail ballot applications due by mail to county clerk for primary elections
1 days before the primary election	Deadline for in-person Vote-by-mail ballot applications for primary elections before 3p.m.
The first Tuesday after the first Monday in June	PRIMARY ELECTION DAY
21 days before the general election	Voter registration deadline for general elections
7 days before the general election	Vote-by-mail ballot applications due by mail to county clerk for general elections
1 day before the general election	Deadline for in-person Vote-by-mail ballot applications for general elections before 3p.m.
The first Tuesday after the first Monday in November	GENERAL ELECTION DAY

SAMPLE SCREENING PROCESS FOR LOCAL CAMPAIGNS

Upon the recommendation of the association's officers, the association may decide to conduct a screening of candidates for the purpose of making an endorsement for _____. A two-thirds vote of those members of the rep council present and voting shall be necessary.

The screening committee: The association president or his/her designee shall chair the screening committee. Each member of the committee shall have one vote. Each head building representative or his/her designee shall serve on the committee. The screening committee chair shall appoint additional members as needed to ensure that each unit of representation has at least one member on the screening committee.

The screening committee chair shall contact all major candidates by mail, phone, or e-mail, inviting them to meet with the committee for the purpose of an endorsement. Every reasonable effort shall be made to contact all candidates. If a candidate is not able to attend, but wishes to be considered, s/he can answer a written questionnaire in place of the meeting. The committee will give all candidates equal consideration.

When evaluating candidates, the screening committee shall consider the following criteria:

- Electability
- Record as an elected official if one exists
- Views concerning public education and issues facing the association
- Accessibility - if able to be assessed based on past experience with the candidate

Any decision of the screening committee shall be by majority vote of those present and voting. The screening committee can recommend to endorse a candidate, or make no endorsement. If a candidate is endorsed, the association will publicize its endorsement to NJEA members living in the candidate's district, with the candidate's permission. Other benefits may be available.

The decision of the screening committee must be approved by the executive committee by a two-thirds vote of those members of the executive committee as a whole present and voting. All deliberations and proceedings regarding candidates shall remain confidential.

SAMPLE SCREENING PROCESS FOR COUNTY CAMPAIGNS

The senior government relations chair or his/her designee shall chair the screening committee.

The screening committee shall consist of at least seven members. Each member of the committee shall have one vote. The screening committee members shall be as follows:

- NJEA Government Relations Committee member(s)
- NJEA Congressional Contact Committee member(s)
- The county president
- The county executive committee member(s)
- The NJREA president
- The NJREA legislative chair
- The President (or his/her designee) of county vocational school associations
- The President (or his/her designee) of the county educational services association or jointure commission association
- The President (or his/her designee) of community college associations
- In the event that the screening committee does not have seven members, the screening committee chair shall appoint additional members from local associations that have sent observers.

The screening chair shall invite all local association presidents to attend the screening as observers. Presidents can send a designee. Observers can provide input to the committee but have no vote.

The screening committee chair shall contact all major candidates by mail, phone, or e-mail, inviting them to meet with the committee for the purpose of an endorsement. Every reasonable effort shall be made to contact all candidates. If a candidate is not able to attend, but wishes to be considered, s/he can answer a written questionnaire in place of the meeting. The committee will give all candidates equal consideration.

When evaluating candidates, the screening committee shall consider the following criteria:

- Electability
- Record as an elected official if one exists
- Views concerning public education and issues facing the association
- Accessibility - if able to be assessed based on past experience with the candidate

Any decision of the screening committee shall be by majority vote of those present and voting. The screening committee can recommend to endorse a candidate, or make no endorsement. If a candidate is endorsed, the county association will publicize its endorsement to NJEA members living in the county, with the candidate's permission. Other benefits may be available.

The decision of the screening committee must be approved by the executive committee by a majority vote of those members of the executive committee present and voting. All deliberations and proceedings regarding candidates shall remain confidential.

Appendix A
**County Member Representation on NJEA PAC Screening
 Committees in N.J. Legislative Districts**

**Retired Designee comes from these lead counties*

***not less than one*

LD	County	Population	County Ratio of District Population (Nearest Hundreth)	County Ratio Multiplied by Ten	**Rounded off Representation of Screening Comm.	Vote by Counties inc. Retired
1	Atlantic	4,942	.02	.2	1	1 4 6 (5+1 ret.)
	Cape May	97,265	.44	4.4	4	
	*Cumberland	<u>120,770</u>	.54	5.4	5	
		222,977			<u>1 ret.</u> 11	
2	*Atlantic	216,352	1.00	10.	10 <u>1 ret.</u> 11	11 (10+1 ret.)
3	Cumberland	36,128	.16	1.6	2	2 6 (5+1 ret.) 3
	*Gloucester	119,654	.54	5.4	5	
	Salem	<u>66,083</u>	.30	3.0	3	
		221,865			<u>1 ret.</u> 11	
4	*Camden	130,288	.58	5.8	6	7 (6+1 ret.) 4
	Gloucester	<u>93,699</u>	.42	4.2	4	
		223,987			<u>1 ret.</u> 11	
5	*Camden	150,044	.67	6.7	7	8 (7+1 ret.) 3
	Gloucester	<u>74,935</u>	.33	3.3	3	
		224,979			<u>1 ret.</u> 11	
6	Burlington	19,131	.09	.9	1	1 10 (9+1 ret.)
	*Camden	<u>204,843</u>	.91	9.1	9	
		223,974			<u>1 ret.</u> 11	
7	*Burlington	221,135	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
8	Atlantic	14,791	.07	.7	1	1 9 (8+1 ret.) 1
	*Burlington	175,825	.80	8.0	8	
	Camden	<u>28,482</u>	.13	1.3	1	
		219,098			<u>1 ret.</u> 11	

LD	County	Population	County Ratio of District Population (Nearest Hundreth)	County Ratio Multiplied by Ten	**Rounded off Representation of Screening Comm.	Vote by Counties inc. Retired
9	Atlantic	38,464	.17	1.7	2	2
	Burlington	9,079	.04	.4	1	1
	*Ocean	<u>177,656</u>	.79	7.9	8	9 (8+1 ret.)
		225,199			<u>1 ret.</u> 12	
10	*Ocean	224,399	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
11	*Monmouth	223,422	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
12	Burlington	23,564	.11	1.1	1	1
	Middlesex	65,375	.29	2.9	3	3
	*Monmouth	69,707	.31	3.1	3	4 (3+1 ret.)
	Ocean	<u>63,277</u>	.29	2.9	3	3
	221,923			<u>1 ret.</u> 11		
13	*Monmouth	224,726	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
14	*Mercer	134,790	.63	6.3	6	7 (6+1 ret.)
	Middlesex	<u>80,160</u>	.37	3.7	4	4
		214,950			<u>1 ret.</u> 11	
15	Hunterdon	11,759	.05	.5	1	1
	*Mercer	<u>203,151</u>	.95	9.5	10	11 (10+1 ret.)
		214,910			<u>1 ret.</u> 12	
16	Hunterdon	47,993	.22	2.2	2	2
	Mercer	28,572	.13	1.3	1	1
	Middlesex	43,417	.20	2.0	2	2
	*Somerset	<u>98,558</u>	.45	4.5	5	6 (5+1 ret.)
	218,540			<u>1 ret.</u> 11		
17	*Middlesex	158,860	.72	7.2	7	8 (7+1 ret.)
	Somerset	<u>62,300</u>	.28	2.8	3	3
		221,160			<u>1 ret.</u> 11	

LD	County	Population	County Ratio of District Population (Nearest Hundreth)	County Ratio Multiplied by Ten	**Rounded off Representation of Screening Comm.	Vote by Counties inc. Retired
18	*Middlesex	216,606	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
19	*Middlesex	224,578	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
20	*Union	224,100	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
21	Morris Somerset *Union	17,664 48,683 <u>147,691</u> 214,038	.08 .23 .69	.8 2.3 6.9	1 2 7 <u>1 ret.</u> 11	1 2 8 (7+1 ret.)
22	Middlesex Somerset *Union	20,862 29,139 <u>164,708</u> 214,709	.10 .14 .77	1.0 1.4 7.7	1 1 8 <u>1 ret.</u> 11	1 1 9 (8+1 ret.)
23	Hunterdon *Somerset Warren	68,597 77,057 <u>70,788</u> 216,442	.32 .36 .33	3.2 3.6 3.3	3 4 3 <u>1 ret.</u> 11	3 5 (4+1 ret.) 3
24	Morris *Sussex Warren	28,117 149,265 <u>37,904</u> 215,286	.13 .69 .18	1.3 6.9 1.8	1 7 2 <u>1 ret.</u> 11	1 8 (7+1 ret.) 2
25	*Morris Somerset	206,620 <u>7,707</u> 214,327	.96 .04	9.6 .4	10 1 <u>1 ret.</u> 12	11 (10+1 ret.) 1
26	Essex *Morris Passaic	37,740 154,076 <u>25,850</u> 217,666	.17 .71 .12	1.7 7.1 1.2	2 7 1 <u>1 ret.</u> 11	2 8 (7+1 ret.) 1

LD	County	Population	County Ratio of District Population (Nearest Hundreth)	County Ratio Multiplied by Ten	**Rounded off Representation of Screening Comm.	Vote by Counties inc. Retired
27	*Essex Morris	151,541 <u>66,700</u> 218,241	.69 .31	6.9 3.1	7 3 <u>1 ret.</u> 11	8 (7+1 ret.) 3
28	*Essex	225,387	1.00	10.0	10 <u>1 ret.</u> 11	11 (10 +1 ret.)
29	*Essex	224,817	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
30	*Monmouth Ocean	112,525 <u>111,235</u> 223,760	.50 .50	5.0 5.0	5 5 <u>1 ret.</u> 11	6 (5+1 ret.) 5
31	*Hudson	220,634	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
32	Bergen *Hudson	25,348 <u>194,631</u> 219,979	.12 .88	1.2 8.8	1 9 <u>1 ret.</u> 11	1 10 (9 +1 ret.)
33	*Hudson	219,001	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)
34	*Essex Passaic	132,073 <u>84,136</u> 216,209	.61 .39	6.1 3.9	6 4 <u>1 ret.</u> 11	7 (6 +1 ret.) 4
35	Bergen *Passaic	49,890 <u>168,799</u> 218,689	.23 .77	2.3 7.7	2 8 <u>1 ret.</u> 11	2 9 (8+1 ret.)
36	*Bergen Passaic	151,142 <u>69,781</u> 220,923	.68 .32	6.8 3.2	7 3 <u>1 ret.</u> 11	8 (7+1 ret.) 3

LD	County	Population	County Ratio of District Population (Nearest Hundreth)	County Ratio Multiplied by Ten	**Rounded off Representation of Screening Comm.	Vote by Counties inc. Retired
37	*Bergen	217,386	1.00	10.0	10 <u>1 ret.</u> 11	11 (10+1 ret.)

38	*Bergen Passaic	197,545 <u>18,791</u> 216,336	.91 .09	9.1 .9	9 1 <u>1 ret.</u> 11	10 (9+1 ret.) 1
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39	*Bergen Passaic	184,225 <u>31,000</u> 215,225	.86 .14	8.6 1.4	9 1 <u>1 ret.</u> 11	10 (9+1 ret.) 1
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40	Bergen Essex Morris *Passaic	79,580 12,411 19,099 <u>102,869</u> 213,959	.37 .06 .09 .48	3.7 .6 .9 4.8	4 1 1 5 <u>1 ret.</u> 12	4 1 1 6 (5+1 ret.)
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Appendix B
**County Member Representation on NJEA PAC Screening
 Committees in N.J. Congressional Districts - 2012**

**Retired designee comes from these lead counties*

CD	County	Population	County Ratio of District Population	Ratio Multiplied by Ten	(NOT LESS THAN ONE) Representation on Screening Committee	Vote by Counties (including retirees)
1	Burlington	26,529	0.04	0.4	1	1
	*Camden	503,008	0.69	6.9	7	8 (7+1 ret)
	Gloucester	<u>203,121</u>	0.28	2.8	3	3
	TOTAL	732,658			<u>1 ret.</u>	
					12	

2	*Atlantic	274,549	0.37	3.7	4	5 (4+1 ret)
	Burlington	2,130	0.003	0.03	1	1
	Camden	10,649	0.01	0.1	1	1
	Cape May	97,265	0.13	1.3	1	1
	Cumberland	156,898	0.21	2.1	2	2
	Gloucester	85,167	0.12	1.2	1	1
	Ocean	39,917	0.05	0.5	1	1
	Salem	<u>66,083</u>	0.09	0.9	1	1
	TOTAL	732,658			<u>1 ret.</u>	
					13	

3	*Burlington	420,075	0.57	5.7	6	7 (6+1 ret)
	Ocean	<u>312,583</u>	0.43	4.3	4	4
	TOTAL	732,658			<u>1 ret</u>	
				11		

4	Mercer	102,106	0.14	1.4	1	1
	*Monmouth	406,484	0.55	5.5	6	7 (6+1 ret)
	Ocean	<u>224,067</u>	0.31	3.1	3	3
	TOTAL	732,657			<u>1 ret.</u>	
				11		

5	*Bergen	526,089	0.72	7.2	7	8 (7+1 ret)
	Passaic	38,078	0.05	0.5	1	1
	Sussex	100,026	0.14	1.4	1	1
	Warren	<u>68,465</u>	0.09	0.9	1	1
	TOTAL	732,658			<u>1 ret.</u>	
				11		

CD	County	Population	County Ratio of District Population	Ratio Multiplied by Ten	(NOT LESS THAN ONE) Representation of Screening Committee	Vote by Counties (including retirees)
6	*Middlesex	508,761	0.69	6.9	7	8 (7+1 ret)
	Monmouth	<u>223,896</u>	0.31	3.1	3	3
	TOTAL	732,657			<u>1 ret.</u> 11	
7	Essex	20,149	0.03	0.3	1	1
	Hunterdon	128,349	0.18	1.8	2	2
	Morris	124,775	0.17	1.7	2	2
	*Somerset	235,835	0.32	3.2	3	4 (3+1 ret)
	Union	183,323	0.25	2.5	3	3
	Warren	<u>40,227</u>	0.05	0.5	1	1
	TOTAL	732,658			<u>1 ret.</u> 12	

8	Bergen	13,835	0.02	0.2	1	1
	Essex	159,689	0.22	2.2	2	2
	*Hudson	434,165	0.59	5.9	6	7 (6+1 ret)
	Union	<u>124,969</u>	0.17	1.7	2	2
	TOTAL	732,658			<u>1 ret.</u> 12	

9	*Bergen	365,192	0.50	5.0	5	6 (5+1 ret)
	Hudson	34,376	0.05	0.5	1	1
	Passaic	<u>333,090</u>	0.45	4.5	5	5
	TOTAL	732,658			<u>1 ret.</u> 12	

10	*Essex	418,271	0.57	5.7	6	7 (6+1 ret)
	Hudson	165,725	0.23	2.3	2	2
	Union	<u>148,662</u>	0.20	2.0	2	2
	TOTAL	732,658			<u>1 ret.</u> 11	

11	Essex	185,860	0.25	2.5	3	3
	*Morris	367,501	0.50	5.0	5	6 (5+1 ret)
	Passaic	130,058	0.18	1.8	2	2
	Sussex	<u>49,239</u>	0.07	0.7	1	1
	TOTAL	732,658			<u>1 ret.</u> 11	

12	Mercer	264,407	0.36	3.6	4	4
	*Middlesex	301,097	0.41	4.1	4	5 (4+1 ret)
	Somerset	87,609	0.12	1.2	1	1
	Union	<u>79,545</u>	0.11	1.1	1	1
	TOTAL	732,658			<u>1 ret.</u> 11	