THE EDUCATIONAL OPPORTUNITY ACT OF 1984:
A STUDY OF LEGISLATIVE POLITICS

DISSERTATION

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By

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The problem with which this investigation is concerned is that of identifying and assessing degrees of influence of environmental conditions and actors which influenced the passage of House Bill 72 by the Texas legislature. The two methods used to collect this data were personal interviews of key actors in the legislative process and a questionnaire administered to all members of the 68th Texas legislature. The data analysis consists of descriptive statistics.

National environmental conditions found to be most influential, in priority order, were (a) national public perception of decline in quality of public education, (b) national economic issues such as international competition and loss of U.S. industrial strength, and (c) national reports such as "A Nation at Risk." State environmental conditions most influential in priority order were (a) Texas legislators' demand for educational accountability, (b) Texas being behind most other states in educational achievement, and (c) the public's demand for improvement in public education in Texas. Within the legislative system, the influence perceived by legislators as most important were, in priority order, (a) Speaker of the House, (b) lieutenant governor, and (c) governor.
Influences outside the legislative system perceived by legislators as most important were, in priority order, (a) constituents, (b) educators back home, and (c) Ross Perot. Recommendations are that (a) educational legislation enacted by the Texas legislature be analyzed from the perspective of program impact, (b) future legislation passed by the Texas legislature which changes House Bill 72 be carefully studied, and (c) the Texas legislature should create a public educational research entity. The results of this study indicate that the influences on the demand of legislators and their constituents for educational accountability and improvement created history in educational reform in Texas in 1984. The combination of top legislators' focus on the problem of educational inadequacies, Ross Perot's catalytic activities and heightened awareness and pressure within the constituency base all worked together to cause the 68th session of the Texas legislature to pass the most sweeping educational reform law in the history of the state of Texas and the $4.6 billion tax increase that went with it.
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CHAPTER I

INTRODUCTION

Many Americans continue to believe that education contributes more to national strength than industrial might or military power (Doyle, 1985). Concern over national well-being led to President Ronald Reagan's establishment of the National Commission on Excellence in Education. The commission's report, *A Nation at Risk: The Imperative for Educational Reform* (1983), sent shock waves through the educational establishment and launched thousands of reform efforts across the country. Among other findings, the commission reported that high school students were scoring lower on achievement tests than at any point in the past 3 decades, that 13% of all 17-year-olds and some 40% of minority youth were functionally illiterate, and that American students ranked last among 21 industrial nations on 7 of 19 academic tests. The commission concluded:

Our nation is at risk. Our once unchallenged pre-eminence in commerce, industry, science, and technological innovation is being overtaken by competitors throughout the world. . . . the educational foundations of our society are presently being eroded by
a rising tide of mediocrity that threatens our very
to adequately finance education. For instance, in Texas in
the first time in
more than a decade without first undertaking a study of the
state's educational system. In the final few hours of the
establishment of a blue-ribbon committee to undertake a study
of Texas public education.
Shortly after the 1983 session, Governor White responded
by appointing a panel called the Select Committee on Public
Education. This 18-member committee was comprised of several
members of the State Board of Education and chairmen of the
House and Senate education committees along with other legis-
lators, leading corporate businesspeople from across the
state, educators, and community leaders. One of the most
important committee appointments was that of H. Ross Perot of
Dallas as chairman.
The Select Committee held public hearings all over Texas
to learn what parents, students, administrators, teachers,
and other taxpayers thought was wrong with public education
in Texas. The committee produced a long list of
recommendations for the governor, who then called the legislature into special session in June of 1984. The result was House Bill 72 (HB 72), the most sweeping reform of Texas public education in history, which necessitated a $4.8 billion tax increase (Kirby, 1985).

This study seeks to identify the conditions and processes which led to the enactment of HB 72. First, what environmental conditions caused this sweeping reform? Second, who were the important actors, and what was the nature of their influence on the legislative process resulting in the enactment of HB 72? For the purpose of this study, the political systems approach to the study of educational politics will be used as a framework from which to examine the forces influencing educational policy making in Texas. The systems approach is believed to be the most comprehensive approach to the study of educational politics. It allows the dynamic process of policy making to be studied by considering the host of environmental variables that impact it (Thompson, 1976, p. 29).

Political Systems

A variety of political, social, and economic forces have pushed states into the forefront of educational policy making in recent years. These environmental stresses can be studied effectively through the political systems approach, which focuses on the set of interrelationships among political actors, institutions, and environmental pressures. The
systems approach is essentially descriptive in character. It attempts to indicate the relationships among various parts of the political system (Meranto, 1967).

The environment surrounding the legislative system may be instrumental in creating input demands on the system. These environmental stimuli may have a direct impact on legislators who perceive the actual conditions as political demands requiring responses.

Researchers have used the political systems approach as a means of examining and understanding the processes by which public policy is made. A political system can be described (see Figure 1) as inputs, demands, and supports from the environment which go through conversion processes and are then released as outputs, such as laws, rules, and actions (Easton, 1965a).

**Inputs:**

(Demands)  
(Supports)

**Outputs:**

(Laws, Rules, Actions)

Conversion Processes

Figure 1. A simplified model of a political system.
The Texas legislature will be conceptualized as a political system for the purpose of this research. Specifically, this study is concerned with the types of influences, both internal and external, that state legislators reported as significant as they enacted HB 72.

A model was developed and adapted from Meranto (1967) to guide the researcher's investigation into the environmental forces and key actors resulting in pressure on Texas legislators to enact HB 72. Figure 2 illustrates environmental stimuli and internal forces affecting education legislation. The items in parentheses are contemporary issues relative to Texas. The task of adapting this model was a necessary prerequisite to the development of a survey instrument and involved interviews with key figures in the reform movement.

In light of the importance of this sweeping legislation, a need exists to understand the influences that had an impact on legislators as they created this bill. This knowledge will enable educators to have wider participation in the determination of future educational goals. Without effective involvement in the political process of educational policy making, the Texas educational system will find its goals determined by someone else. Never before in Texas education has the relationship between educational policy and politics been more critical to the future of our state than it is today.
Environmental Stimuli

A. Changes in Circumstantial Conditions
   1. Economy (international competition on high-tech businesses, fiscal retrenchment, taxpayer's revolt)
   2. Politics (state mood due to oil crisis, zero-sum politics)
   3. National Reports (deterioration in secondary education, media impact, public perceptions of public education)
   4. Court Decisions (equalization issues)

B. Changes in Major Demand Articulators
   1. Constituents (Grass roots—broad public support)
   2. Organized Interest Groups
   3. Political Parties (growth of Republican party, change in political system)

Figure 2. A model of legislative influence.

Statement of the Problem

Little is known about the influence of environmental conditions, groups, and individuals that came to bear on Texas legislators as they enacted HB 72. The literature shows no comprehensive study of this problem. Media reports during the 1984 legislative session contain most of what has
been written about the influence on legislators. Educational policy making by the Texas legislature can be more meaningful and effective in the future when all those concerned with public education understand the legislative process that created the most major educational reform in the history of Texas.

Purpose of the Study

The purpose of this study was threefold: (a) to identify and describe changes in environmental conditions which led to the enactment of HB 72; (b) to identify the actors who shaped the legislation and to identify how legislators perceived the extent of their influence; and (c) to assess reasons why these groups and individuals were influential in the enactment of HB 72.

Research Questions

1. What environmental factors did legislators perceive as leading to educational reform in Texas?

2. Who were the most influential groups and individuals involved in the formulation of legislators' views resulting in the enactment of HB 72?

3. Why were certain groups and individuals more important than others?

Background of the Study

Current trends suggest that state governments are exercising an increasing role in the governance of the public schools. The current effort of the federal government to
push more of the responsibility for education back to the states and to demand that the states provide an increasing portion of school support are two contributing factors to this trend. Governors and legislators are required to scrutinize programs in education with greater care than ever before because of these forces and also because of the ever-expanding education budget (Campbell & Mazzoni, 1976). As states are pressured by the federal government to assume more responsibility, state governments are at the same time pressuring local school districts to maximize their local taxing ability for education.

These trends have prompted various authors to reaffirm that the fundamental authority in the legal structure for education in the United States is the state. More specifically, the authority is lodged in the state legislature, which has the primary authority and responsibility for determining educational policies and programs. Except for specific limitations on the legislature's power, which may be contained in the state constitution, and the general limitations imposed by the U.S. Constitution, the state legislature's authority is complete and absolute (Pharis, 1970). Thompson (1976) noted the influence of the state legislature when he cited Alexander Heard:

... despite the common misconception that education is a local responsibility, local boards of education may do only what is authorized by law enacted by the state
legislature. State legislatures are, in effect, the super school board of the state. . . (p. 117)
The basic authority of the state to create and govern the public schools is embodied in state constitutions. The Texas Constitution, Article VII, Section 1, states:
A general diffusion of knowledge being essential to the preservation of the liberties and rights of the people, it shall be the duty of the legislature of the State to establish and make suitable provisions for the support and maintenance of an efficient system of public free schools. (Vernon, 1955)
The Texas legislature, thus, has policy-making responsibility for public education in Texas.

Influence on State Legislatures
State legislatures have the ultimate authority for education within the state. Because so much power is contained in the legislature, many influences are brought to bear upon legislators. The legislature today is much different from what it used to be. It is permeable, professionalized, democratic, and fragmented. It has been shaped along these lines partly by the lobbyists who work the legislature and partly by the environmental forces the legislature reflects. No longer is access the privilege of the few. The pressures on the legislature are unabating and from all directions (Rosenthal, 1977).
Legislators today are more independent, moralistic, aggressive, and issue oriented. They are creatures of the contemporary climate and are consequently more likely to have critical attitudes toward public education (Rosenthal, 1977, p. 3). Prior to the 1970s and 1980s, state legislatures reviewed elementary and secondary education as a local responsibility. Their primary interest was in the funding formulas for local districts (p. 2). Detailed educational policy decisions were generally worked out in the House and Senate education committees with the state education agency and other educational establishment groups working with the legislators on those committees. Most of the legislators rarely became intimately involved with education bills.

Legislators today have taken their seats during a period when the state legislature itself was undergoing substantial change. No longer are legislatures uninvolved or passive. They are now involved and assertive, not only in policy formulation, but increasingly in the exercise of oversight and control (Rosenthal, 1977, p. 3).

The ways in which the legislature goes about making policy relate directly to behavioral norms which develop over time. Legislators operate within a set of real and imaginary constraints which significantly affect how they view policy proposals and how they interact with their fellow legislators and persons outside the legislative body. They are subject to much pressure from individuals and groups, both within
and outside of the legislature. Within the legislature they talk with and listen to their colleagues, committee chairmen, and party leaders, exchanging information, ideas, and advice. They also interact with external executive agency personnel, interest groups' representatives, and various subgroups from their constituencies (Milstein & Jennings, 1972, p. 62).

The future success of American education on all levels was and will continue to be shaped by political decision makers. Therefore, only those who understand political influence can be useful in furthering major educational policy goals (Bailey, 1975).

An early study of the forces influencing state legislatures' decisions in education was conducted by Neiss (1962). He found that effective lobby groups developed an individual pattern of working with each legislator of the Missouri General Assembly and that the technique of personal contacts with legislators by lobbyists was much more effective than indirect contacts.

Research has found that both internal and external pressures on state legislatures affect the legislation that is enacted. Party influence and leadership are important in determining legislative behavior of the New York State legislature. The results of the Milstein and Jennings (1972) study indicated that there were serious perceptual differences between educational interest group leaders and state
legislators and that educational interest group leaders
needed to consider modification of their strategies if they
were going to be effective in influencing state legislators.

Perceptual differences centered on the following:

a. The governor's office as the key to the
policy-making process. Educational interest group
leaders perceive the governor and his executive agencies
as the entree point to the policy-making process, partic-
ularly through his legislative initiative. Legislators
do not feel that the governor plays such an important
role in this process, the most potent influence being
his veto power.

b. The legislature as a highly centralized body.
Educational interest group leaders perceive the
legislature as highly controlled by a leadership group
that carries the governor's program. Legislators feel
that these leaders exert much less influence than
supposed by outsiders and that the leaders do not
necessarily oversee the governor's program in the
legislature. The exceptions come when there is a party
position or the measure being considered is a party
bill.

c. Information as a potent interest group resource.
Educational interest group leaders feel that their most
important influencing weapon is access to information
which can be used by legislators in their decision-
making process. Legislators feel that there are many sources of information at their disposal; interest group information is but one of these sources and often not the most important.

d. Representation of interest group concerns. Educational interest groups concentrate their activities in the hands of a few men at the state capitol and ask their memberships to influence legislators from their home districts. Legislators feel that groups, educational and non-educational, in their districts are more important than are the formal interest group representatives in the state capitol in influencing their actions (Milstein & Jennings, 1972, pp. 67 - 68).

In a study of the Pennsylvania state legislature, Senate and House leader roles were found to be important in influencing legislator votes. State legislators perceived the views of their constituents and experts in the legislature as the most important influences in the formulation of their views on education legislation. "Educators back home" influenced approximately 90% of the combined assembly in Pennsylvania (Whitehill, 1976). The interaction between the legislature, the chief executive, administrative agencies, and interest groups does more to affect legislation than the continual shifting of temporary coalitions organized to support or oppose legislative issues (Fuhrman, 1984).
A useful visual construct of membership composition for those influencing policy-making at the legislative stage is shown in Figure 3. The individual groups and organizations that are included in the Legislative System Configuration may be involved in the legislative stage in a number of ways. These groups enter and leave the process at various stages depending upon their interest in influencing the process (Jewell & Patterson, 1973).
Methodology

Procedures for the collection of data for this study consisted of interviews with key actors in the 1984 passage of HB 72 and a one-page questionnaire administered to all members of the 68th Texas legislature. The interview schedule was developed from the research questions of the study. The 19 people selected were identified as having been involved in the special session in which HB 72 was passed. The interviews were conducted by the researcher. Data from the interviews were then used to develop the questionnaire. The questionnaire dealt with the environmental conditions that led to educational reform and the forces that pressured the legislature to pass reform legislation. It also asked legislators to identify groups and individuals and assess their degree of influence on the passage of HB 72. A four-member panel consisting of a chamber of commerce lobbyist, a former Texas legislator, a university faculty member, and a staff member of the Texas Research League validated the questionnaire.

The data analysis consisted of descriptive statistics as the initial calculation. Correlation coefficients were calculated to summarize the degree of relationship between pairs of variables. A factor analysis was also used to identify the common elements among the items.

Significance of This Study

Systematic analysis of the Texas legislature and its response to internal and external influences on the making of
educational policy has been limited. Earlier literature on the influence on the Texas legislature focused on identifying the influential actors in the process through which the states established public school policy. In a 1976 study, Campbell and Mazzoni limited their research to the relatively stable group of actors who had a continuing concern with public school policy and who interacted on a regular basis. They found the National Education Association (NEA) teacher association affiliate, the Texas State Teachers Association (TSTA), to be the most influential of the education interest groups. TSTA was found to function as an umbrella organization with political muscle of significance to the legislators. Texas legislative leaders described the educator groups as being united on "nearly all" or on "most" issues. Education coalitions, comprised generally of education organizations and school groups such as PTAs, were found to be ineffective in Texas. The Texas governor and chief state school officer were found to be key influences on education issues affecting basic fiscal policy. The state board was found to have marginal importance (Campbell & Mazzoni, 1976).

The current study is not limited just to education-related groups and the stable group of actors concerned with public school policy in general. Rather, it focuses on the influence of environmental conditions as well as the influence of various groups and individuals on a specific
Texas legislative event, the enactment of HB 72. Since this major educational reform legislation was a unique event in Texas history, it was believed that a critical study of this single contemporary event would contribute more substantially to the knowledge of educational policy making.

Definition of Terms

1. Influence. To have an effect on the condition or development of something.

2. Politics. The art or science concerned with guiding or influencing governmental policy in the authoritative allocation of values for a society.

3. Educational policy making. The process in which the making of educational policy is conceived of as a system in which individuals, groups, and organizations compete for the allocation of scarce resources.

4. Legislature. A collection of individuals who are elected as members of the formal parliamentary bodies prescribed by national and state constitutions.

5. Legislator. A member of either the Senate or House of Representatives.

6. Interest group. An organized group which tries to influence policy makers.

7. Political system. Is comprised of the multiplicity of social interactions involved in the policy-making process oriented for a society.

8. Lobbying. The "opportunity to freely express
opinions on legislation, pending executive actions, and current issues to individual members of the legislature, legislative committees, state agencies, and members of the executive branch" (Texas Lobbying Registration Act, Policy 305.001).


11. **Power.** A social phenomenon associated with some individual or group of individuals.

Limitations

The data for this study were collected from and limited to the population of the members of the 68th Texas legislature. The study was only able to identify variables that were important and related. Due to the exploratory nature of this study, causal relationships were precluded. Other limitations were (a) only dealing with one piece of legislation, (b) no attempt to generalize to other states, (c) trade off between length of questionnaire and return rate (had to leave out things that might be important), (d) simplicity of instrument, and (e) reliance on people's memories.

Assumptions

It was assumed that the responses received on the survey instrument were the opinions of the legislators and that the legislators responded honestly to the instrument. It was also assumed that their memory was recent enough to be accurate in their responses.
CHAPTER REFERENCES


CHAPTER II

REVIEW OF THE LITERATURE

In this chapter, a review of the literature on influence on state educational policy making, political systems, and state legislatures is presented. The chapter begins with a discussion of the political systems approach to studying state educational policy making followed by a review of the politics of state legislatures. The various influences on state legislatures are then examined. The chapter concludes with a summary of the politics of education in Texas.

Political Systems

The function of a political system in any society is to make choices from competing demands made by individuals and groups and to maintain the social system based upon these choices (Thompson, 1976, p. 8). This value allocation causes problems at the policy level which are imbedded in a network of economic, political, psychological, social, and moral components. Every one of these separate dimensions is itself a multi-dimensional matrix of incredibly rich complexity, and they all interact (Mann, 1975).

The systems approach posits the proposition that a system is designed to focus on the set of interrelationships among political actors and institutions. The systems
approach is essentially descriptive in character. It attempts to indicate the relationship among various parts of the political system (Meranto, 1967). Another fundamental proposition of the systems model is that political systems may be differentiated from other social systems in that they are oriented toward the authoritative allocation of values for a society (Easton, 1965a).

Mann (1969) utilized systems analysis as a conceptual framework for organizational policy in response to political demands. He attempted to show how such demands require a fundamental initial analysis so they can be recognized and coped with.

Political systems theory shows a commonality with the educational systems of American states. The political systems approach stresses the utility of viewing policy making as an interactive process through which inputs, including demands for change, are converted into outputs, including authoritative decisions (Campbell & Mazzoni, 1976). Easton (1965b) regards inputs as the "summary variables that concentrate and mirror everything in the environment that is relevant to...stress" (p. 26). Demand inputs, as the name indicates, are expressions that something be done by or changed about the system (Mann, 1975). A demand may be defined as an expression of an opinion that an authoritative allocation, with regard to a particular subject matter, should or should not be made by those responsible for
doing so. The source or origin of demands varies. One important distinction is whether the demand comes from inside or outside the boundary of the system. Those that come from outside may by honored less frequently than those that come from inside the system's boundaries. This latter category is called a withinput for the obvious reason that these are inputs that originate within the system boundary (Easton, 1965b, p. 38).

Mann (1975) identifies environmental stress as an input to the system. Another way to express this is to refer to these stresses as demand inputs. Tensions arise in society for various reasons. In turn, these pressures lead to discomfort and, thus, to demands. Responses to demand inputs fall into two major categories. The first response is to regulate the demands directly so that those received by the system do not overburden it. The second is for the system to produce outputs that match the demand inputs. The satisfaction engendered by those outputs is then supposed to transform the original demands into support for the system. Systems maintenance is, thus, a business of regulating the flow of demands and then of satisfying those demands that cannot be regulated by provoking or eliciting the support necessary to balance them.

Miller (1978) believes that the deciding process for all systems consists of four stages: (a) discovering goals or processes, (b) analysis, (c) synthesis, and (d) implementation. The discovery of goals or processes refers to the
choice of systems whose maintenance or achievement is desirable. Once those are selected, they then are compared (the analysis stage) with information from the environment. Finally, implementation involves transmitting the selected solution as a command signal. "If a system has multiple purposes and goals, and they are not placed in clear priority and commonly known by all components or subsystems, conflicts among them will ensue. . . . When a system is receiving conflicting command signals from several suprasystems, it is intermittently being a component of all of them; the more different the signals are, the slower is its decision making" (p. 404).

Campbell and Mazzoni (1976) have developed three preliminary orientations to political systems: (a) policy decisions are system outputs, (b) the boundary which sets the system apart from its environment should be specified, and (c) functional relationships should be identified. This permits a better understanding of the relationships.

Thompson (1976) notes that the traditional view of studying educational policy making was, from a legal perspective, supported by traditional organizational theory. As it applied to schools, the people elected the school board to make policy, and the administration administered those policies. Thompson feels that traditional organizational view is inadequate today because it does not describe the dynamic processes of policy making as the systems approach does. The political systems approach considers the host of
environmental variables that interact to shape policies. The term immediate environment refers to the various individuals and groups with interests in state school policies, interests that on occasion come to be expressed as political demands. Crossing the boundary from the immediate environment to the system itself, one finds a relatively stable group of actors who have a continuing concern with public school policy, who interact on a regular basis, and who together constitute the elements of the state educational policy system. These actors, as identified by existing research, include the governor's office, the legislature, the state board of education, the chief state school officer and state department of education, the state courts, and the state-level educational interest groups (Bailey, 1975; Milstein & Jennings, 1973; Usdan, Minar, & Hurwitz, 1969).

The use of a political systems approach to the study of state educational policy making is a solid way to conceptualize the numerous variables and their relationships that interact to make legal decisions. With a good framework from which to view the hosts of environmental conditions, groups and individuals involved in the political process, it is easier to look systematically at the immediate environment of the legislative system as well as the environment outside the boundaries of the legislative system.

State Legislatures

Rosenthal (1977) believes that legislatures in the states are becoming better decision makers. Changes in their
composition following reapportionment and activities of several legislative leaders, along with national organizations, caused state legislatures to rebuild themselves. They are better decision makers because their time on task has increased, professional staffs have expanded, procedures have become more streamlined, facilities have been enlarged, finances disclosed, and conflicts of interest reduced. They developed a greater capacity to perform legislative functions. Rosenthal also observes that legislative power today is significant. As states have strengthened their positions in the federal system, so legislatures have strengthened their positions within the states. For the states they provide a useful means of aggregating diverse interests, reconciling conflicting demands, and maintaining a degree of consensus in the society.

Changes in the legislature have made greater assertiveness possible and even natural. These changes are in the legislature's capacity, its internal distribution of power, its habits of work, and its composition. Legislative capacity has been enhanced along with a tremendous increase in the professional staffing of state legislatures during the last ten years. There are now staffs for party caucuses, budget and fiscal review, bill drafting, standing committees, program analysis and evaluation, and auditing. In many states administrative aides are assigned to rank-and-file members as well as to legislative leaders. Staffs enable
legislators to turn to sources other than the state departments and education interest groups for information about educational matters (Rosenthal, 1977).

The internal distribution of power within legislatures has been shifting. Strong, centralized leadership is on the wane in House and Senate chambers. Strong leaders still exist in such places as the Speakers of the House in New York, Pennsylvania, Florida, Massachusetts, and president of the Senate in Alabama, Florida, Massachusetts, and Texas. But power is becoming more decentralized. The emergence of standing committees makes it difficult for leaders to exercise control. The day has passed when the governor and a few legislative leaders can get together with representatives of education and agree on matters. Leaders are depending on their education committees for policies and programs, and the committees are assuming that their leaders will provide support. The process is becoming more unpredictable and more open (Rosenthal, 1977).

The work habits of the legislature are also changing. Members are spending more time and are working harder at their tasks. Almost all legislatures now meet annually instead of biannually; virtually all stay in session longer than before. The composition of legislatures has changed also. Although not noticeable in terms of gross social and occupational characteristics, the post-reapportionment generations of state legislators are different from their
predecessors because they are more independent and issue-oriented (Rosenthal, 1977).

Politics of the State Legislature: Power and Influence.

Politics is involved in most of what goes on in the governing of human society because people are constantly trying to influence those who can lay down and apply the rules (Lockard, 1969). Harold Lasswell (1936) states, "The study of politics is the study of influence and the influential" (p. 1). Donald (1982) states that "All political action is a matter of power--the ability to make others do what we want them to do" (p. 3). Anyone who presses for a certain aim, or who tries to persuade someone to say or do a particular thing, is exercising political power.

Lutz (1965) states that all people do not have equal influence or power. Recognition of this fact led to an examination of the bases of influence and power. The bases of social and political power were found to include such factors as the following: (a) control over wealth and other resources that can be used as sanctions (e.g., bank, credit, land, jobs); (b) control over information and communications, including the control of information by administrators and experts, as well as control over the mass communication media; (c) control over solidarity groups such as unions, racial, and religious groups; (d) control over status and prestige in the community; (e) personal popularity, esteem,
or charisma; (f) powers of office, legality, and constitutionality; and (g) the right to vote (Lutz, 1965, p. 19-25).

Lockard (1969) identifies power as a social phenomenon associated with some individual or group of individuals. Possible bases of power are prestige or respect, wealth or other control over rewards, punishment or terror, and legitimacy or formal authority. Legislative bases of power may be party organization, the governor, legislative rules and structure, campaign contributions, patronage, political support, and bureaucracy-clientele cooperation. (The state department of education can depend on public support from prominent individuals and powerful organizations intimately concerned with education.) Lockard also finds differences among state legislatures are striking in that some are powerful, some are weak. Some legislatures are efficient and well-organized while others are almost chaotic. Legislatures can be dominated by powerful parties and torn by dissidence and factional rivalry.

State Legislatures and Educational Policy Making.

Significant changes have taken place in the process through which the states determine public school policy. A decade ago a relatively stable educational policy system existed in many states; interaction among organized school supporters, agency bureaucrats, and political leaders occurred in a fairly predictable fashion. The dominant educational interest groups had established structural
mechanisms and personal relationships that linked them to each other and to other public school advocates. Working closely with sympathetic lawmakers, the educator organizations constituted an effective lobby, relying on their interorganizational unity, perceived expertise, information generating capacity, and grass-roots communications (Usdan et al., 1969).

Powerful forces converged in the 1960s to produce a new pattern of state school policy making. First, collective bargaining between teachers and school boards arose in many states as a divisive issue. Second, spiraling educational costs contributed to a broad-based "taxpayer revolt" and combined with doubts about the efficacy of schooling, led to a popular demand for accountability. A third factor that altered educational policy making in several states was the evolution of competitive two-party systems. Party competition generated a search for political issues, one source of which was education (Usdan et al., 1969).

Legislatures bring with them certain forms of myopia and instability with respect to educational policy. Among these are the high turnover rate and short duration in office; the overriding concern with dollars to the exclusion of programmatic concerns; the tendency to legislate without appropriating sufficient funds for operation or for systematic evaluation of results; the inability of nonpartisan legislative councils and budget offices to build the analytic
capacity and prestige necessary to alter predictable patterns of decision making; the multiplicity of coalitions and interest groups, many of them pressing for narrowly selfish ends or for rigid enforcement of the status quo; the difficulty of following through on an issue that requires an incremental approach; and, many educators would add, the sheer chaos and fragmentation introduced into education policy making by a growing reliance on the legislative process (James, 1976).

This complex pattern of fragmentation has had some important effects and elicits many questions about future trends. First, while in the 1950s and 1960s, it was possible for the whole education community to present a united front; by the 1980s it seems increasingly less likely that even single organizations can maintain a coherent position, let alone unanimity (Duane & Bridgeland, 1980).

Educational policy making at the state level today is a kaleidoscopic process. The changing patterns of environmental conditions and the interrelationships of groups and individuals interested and involved in state educational policy are unmistakable. Educators must study the legislative process if they are to be a part of policy decisions that affect the future of public education.

Influence on State Educational Policy Making

Drawing on the works of various scholars, Campbell and Mazzoni (1976) assumed the following about policy-making
influence, which is defined as the ability of an actor in a policy system to select, modify, or obtain its decision outputs.

(1) Public policies are the outgrowth of an influence process in which competing actors seek to realize decision benefits.

(2) Focal actors in the influence process are those officials seen as being entitled to render authoritative decisions.

(3) Possession of policy-making influence is dependent on access to resources (office, information, wealth, votes, etc.), the willingness to exploit these resources, and their skillful application.

(4) Relationships among policy actors in the influence process are direct and indirect, the latter often being the result of these actors seeking to involve third parties, including the general public.

(5) Influence in policy making occurs within a social system where informal rules (e.g., critical norms and established routines) as well as formal rules, (e.g., the legal structure of government) shape the exercise of power.

By the beginning of the 1970s, influence in many state educational policy systems had become diffuse, relationships were in flux, and power in these systems was "up for grabs" (Usdan et al., 1969). The policy process--the power structure of American education--is no longer a tightly-knit
or closed system. Intervention in the policy process is usually wide open to any individual or group who can claim to represent a constituency, who can claim access to specialized information, and who is familiar with the avenues of access. Nor is the policy process monolithic, fixed, or static. It is constantly evolving and relentlessly interactive. Nothing is ever finished. Educational policy making is viewed as an evolving, interactive process open to external ideals and influences, involving many individuals and groups (Kearney, 1980).

To the degree that policy makers and researchers are concerned about the influence of states on the provision of education, they should focus not on doctrinal questions and arguments about comparative advantage but on the determinants of state influence (Elmore, 1984). Those who make decisions at the state level are protected from influence by distance, complexity of state government, and administrative assistants. When exercising power at that level it is important to understand the following:

1. Financial support for education is controlled as much by the governor's office as by the State Board of Education or the legislature. Therefore, working with the governor or the governor's budget officer is of primary importance. It is the first opportunity to influence what is done.
2. Working with key members of the legislature is more important than working with many members. Especially important are the education committee chairman and members of the state executive committee.

3. For educational matters, the strongest influence is exercised by individuals working quietly with members of the educational committees.

4. Constant contact with the legislative process is imperative in directing the business of the House and Senate. (Donald, 1982, p. 3)

The following generalizations about influencers in state educational policy systems were made by Campbell and Mazzoni (1976):

1. Organized educators, albeit badly fragmented in most states, are among the most influential groups in the legislative arena. While existing education coalitions are largely ineffective, "teacher power" based on members, money and organization has emerged as a new and salient political reality for state law-makers.

2. Governors are key influencers on education issues affecting basic state fiscal policy. They have developed staff capability for independent action on education policy questions. The nature and extent of gubernatorial involvement appear to be critical to the fate of school finance reform.
3. State boards are policy actors of marginal importance in most states. They are perceived as wielding little influence in the legislative arena and as being overshadowed by the chief state school officer in the agency arena. Doubt, therefore, is raised about which policy-making functions, if any, these boards perform beyond formal legitimation.

4. The chief state school officer is typically an influential policy actor. State boards see the chief as being crucial to their decisions on policy issues.

(p. 20)

At least some overburdened officials, legislators, and staffs wish there might be an external, objective think-tank to analyze all the conflicting claims and the kaleidoscope data of competing educational interests. This would give decision makers a balanced and objective report on what, in fact, is in the public interest (Pipho, 1980).

Masters, Salisbury, and Eliot (1970) in examining the politics of three states in terms of governmental decisions affecting public schools found that influence on legislators in Missouri was not urban versus rural, did not involve large-scale economic groupings imposing their will, did not generally involve liberals against conservatives, was not predictably based on party loyalty, included considerable pressure which constituted the principal basis for legislator's decisions on budgetary questions, involved weak
executive leadership on non-budgetary issues, and often came from the Speaker and majority floor leader in the House and the president pro tem in the Senate who had enough prestige and/or power to control decision making. They also found that legislators might defer to certain of their colleagues in particular areas where the latter are regarded as expert or powerful.

The influence of the governor on education issues in most states has been restricted by the lack of expert staff in his office and by a staff with a viewpoint independent from the state department of education (Kirst, 1976). Governors have developed the staff resources to permit their active involvement with school policy making and have recruited as their close advisors, persons who have backgrounds that are political more than educational, lacking especially backgrounds in the public schools (Campbell & Mazzoni, 1976).

Milstein and Jennings (1973) found that educational interest group leaders saw the governor's office as a critical access point to the policy-making process. Several reasons were given. First, the governor, as a state-wide elected official, is in a position to bring state-wide considerations to bear on educational issues. Second, the governor is responsible for developing an executive budget which forecasts the state's fiscal needs and is the expression of his program for state growth and development. Third,
as the recognized leader of his party, the governor can bring
great influence to bear on his party's legislators.

The strategy of coalitions in trying to influence
legislators is usually to achieve consensus among the various
interest groups outside the maneuvering of the state
legislature. In effect, coalitions modify competing programs
and compromise values so that a united demand is presented to
the legislature and the governor. In this way, coalitions
are performing one of the functions of political parties
(Kirst, 1976).

Besides political parties, interest groups lay claim on
legislators. Some legislators take their cues from groups
with whom they have been associated over the years. Some go
along with business and some with labor. Some are close to
the environment and others nearer to developers. There are
alliances based on pragmatism rather than on principle.
There are legislators who come to assume that what the
special interest wants is what the public interest requires.
Alliances are facilitated when groups have clout and can
combine contact, cash, and electoral activity. An example of
such a group is teachers. Alliances are two-way affairs with
traffic flowing in both directions. Legislators make use of
interest groups and their lobbyists, just as groups make use

It is ineffective for educators to act as if all parts
of the education lobby can pursue their own objectives
without damaging education's position relative to other interests. If a potent education coalition is to be built and maintained in the economic and political climate of the 1980s, urban representatives can no longer ignore the needs of small districts, and teachers cannot spurn administrators' concerns. The politics of retrenchment require that education advocates agree on what is most important for education generally and acquire a new statesmanship in representing education interests. The politics of retrenchment also mean that educators must abandon their traditional isolation and build a broader coalition that actively acknowledges the new complexities of public sector financing.

Retrenchment effectively has put an end to single-interest legislation which was the policy vehicle of the past (Campbell & Mazzoni, 1976). Educators' reluctance to broaden their coalition base and to make compromises across policy sectors (rather than just within the education lobby) ignores the realities of successful political action in an era of fiscal constraint (McLaughlin & Catterall, 1984).

When looking at the influence of knowledge and information, Rosenthal (1977) found that legislators do not want complicated information. They do want information that is accessible, convenient to use, understandable, reliable, and that identifies both benefits and costs of proposals. Legislators want information that leads to action and not to education. They want to solve problems rather than discover them.
State Boards of Education are generally not significantly influential on the legislative process. Mazzoni (1976) found that 50% of the legislative leaders contacted evaluated their state boards as being "of minor importance," and 22% said they were of no importance at all. When asked why, they replied that boards did not involve themselves in politics, were generally invisible to lawmakers, and were not able to organize constituent support. Legislative leaders depended heavily on the state school officer rather than on the board for advice, counsel, and information.

Legislators look mainly to their colleagues for cues on which they can rely when deciding how to vote. If an interest group can persuade one or several legislators to take the lead, it will have done its work well. Legislators are more likely to take cues, at least directly, from their colleagues inside the legislature than from interest groups, the governor and other executive officials, state-wide party leaders, and constituents. Ulsaner and Weber (1977) found only one fifth of the cue givers, according to legislators, are outsiders. Two thirds, by contrast, are insiders, including legislative party leaders (9%), committee members and other specialists (26%), representatives from the same or adjacent districts (13%), and personal friends in the legislature (17%).

Rosenthal's (1977) research found that influence on state legislators comes from their constituency, staff, and
governor. A legislator's constituency is of overriding concern expressed in ways other than voting behavior on legislation. Milbrath (1963) confirms this view that the wishes of a member's constituents are a decisive factor. A legislator could suffer dire consequences, such as not being reelected, if he steps outside the boundaries of the desires of constituents (p. 334).

The influence of political party affiliation in many states is the most significant party organizational strength, no experienced actor would ever fail to seek the support of the party leadership (Lockard, 1969). Most legislators, finding political possibilities in the future to be ill defined, support their party in the legislature so that should an opportunity ever arise they will be among the eligibles (Barber, 1966). In contrast to Lockard and Barber's findings, Bronston (1978) found that legislators are more apt to wander freely through issues and loyalties, freer than ever before of party discipline and party ideology.

Professional staffing has had a profound impact on state legislatures and the legislative process. In many states today staff professionals are key actors in the legislative process. Legislative staff today reduce the dependency of legislators on interest groups for information, but they increase the dependency of legislators on their own staffs. It has merely exchanged the known bias of some particular group for the more individual, more personal, but not
necessarily less prejudicial views of legislative staff. The preconceptions of a staff member are far more difficult to discover because they do not announce them publicly as lobbyists do.

Staff influence depends on a number of factors. First, the more technical the problem, the more likely staff will be influential. Their role in reviewing the budget is substantial. Second, the less salient the issue to people, the more likely staff will be influential. Where there is what has been termed "a zone of indifference," staff play a greater role. Where issues are controversial, emotional, or partisan, the role of staff is lessened. Third, the newer the issue and the more unrelated to ongoing legislative concerns, the more likely staff will be influential. Fourth, the greater the confidence of legislators in the staff's subject matter knowledge and political sensitivity, the more likely staff will be influential (Balutis, 1977).

An effect of professional staffing was found to be an increase in staff influence and a reliance on staff as a source of ideas for new legislation. Staff were also seen as an intermediary between legislators, on the one hand, and interest groups and executive officials on the other. "The evidence seems clear," one study concluded, "that increased professional committee staffing is associated with increased staff influence" (Clarke, 1978, p. 44).
The growth of legislative staffs and increasing public dissatisfaction with education opened the way for a more detailed and programmatic interest on the part of legislative committees. Court cases challenging inequities in school finance, education for the handicapped, and other critical areas persuaded many legislators and some governors that immediate action at the state level was necessary (James, 1976).

All legislators acknowledge that they give some consideration to education interest groups before voting (Whitehill, 1976). The amount of consideration varies from study to study. Campbell and Mazzoni (1976) found fragmentation among educational interest groups to be a prevailing condition. However, the data suggested that the groups were still influential. Eighty-one percent of the legislative leaders interviewed said that the education lobby, in general, in their state was at least among the top groups. The study also found that the relatively powerful education lobbies tended to be found in the less urbanized, less industrialized, and less wealthy states. Texas was ranked second. They also found that the cohesion variable and the influence variable were highly associated statistically with the socio-economic conditions of the state.

Interest groups' activities rank among the most visible contributors to policy change in modern industrial societies. Many critical scholars contend that group
activities are so pervasive that they can hardly be distin-
guished from the activities of agencies, bureaus, legislative
committees, and other bodies that exercise formal policy-
making authority. Whether groups are praised or blamed,
their power is often assumed. However, many studies of group
influence may confuse high visibility with political muscle.
Because interest groups often need to show their members that
they make a difference, group leaders are anxious to provide
glowing accounts of battles fought and wars won. When
Peterson and Rabe (1983) analyzed the forces introducing new
policies, they seldom found organized groups to be the vital
factor.

An organized interest group may be said to represent a
concentration of power. It is a means by which individual
units of power may be maximized to exert an impact greater
than the sum total of such units acting separately. A group
that is organized has, on the whole, a tremendous advantage
over comparable, unorganized groups. Organization provides a
more systematic means for uniting money and effort behind the
special functions of leadership. It focuses the energies and
political resources of the membership more efficiently behind
those interests which they share in common. Without an
organization to espouse and advance these interests, individ-
uals within a group may find their voices drowned out by the
claims of others. Organization, then, provides a tool for
articulating and focusing a group's claims upon society.
The second advantage of organization is that it establishes an accessible source from which politicians, government, and other interest groups may seek support for their own endeavor. Interest groups are just one set of external inputs in the legislative process. To achieve any impact there, they must offer services that legislators find necessary and desirable (Holtzman, 1966).

Milstein and Jennings (1972) found that within the legislature itself, educational interest group leaders focus their activities on the legislative leadership. The interest group leaders defined legislative leadership as the Speaker, the Chairman of the Ways and Means Committee, and the Chairman of the Education Committee in the Assembly and the Majority Leaders, the Chairman of the Finance Committee, and the Chairman of the Education Committee in the Senate. The minority leader in each chamber was also identified as a legislative leader. A secondary tactic, less universal in application, is to contact individual legislators in their home districts.

Milstein and Jennings (1972) found that most educational interest group leaders thought that their most important influencing mechanism is the information gathering and dissemination potential of the organizations. The basic assumption is that through their unique ability to gather data state-wide and provide factual information to the governor and the legislature, these organizations are able to influence the shaping and processing of educational legislation.
They found that the educational interest groups in New York generally held these perceptions:

1. The governor's office is the key access point to the policy making system.

2. The legislature is centrally controlled by a few legislators who hold the leadership positions within that body.

3. The educational interest groups' most potent weapon in influencing the policy-making process is their ability to make recommendations concerning educational policy modifications based upon data about the needs of education in New York.

4. Interest group memberships will maintain pressure on their legislative representatives to achieve organizational objectives concerning educational legislation, but major responsibility for influencing the policy-making process is placed in the hands of one or two organization leaders who maintain contact with policy-making officials in Albany.

Kirst (1976) says the most important single interest group has been the state teachers' association, the affiliate of the National Education Association (NEA). The Texas State Teachers Association, for example, is strong enough to commit state legislators to salary proposals during campaigns or primary elections; it has been notably successful in overriding the governor's budget recommendations.

When examining which groups were most successful in having their demands translated into subsequent legislation,
Webb (1981) found the forces which had the most to do with shaping educational policy during the Arizona special session had nothing to do with the actors on hand, that is, the legislators or representatives of special interest groups. General public pressures for lowered taxes and the threat of a Proposition 13-type measure had as much or more to do with the tax reductions that took place, especially those to homeowners, than the activities of any special interest group. As one legislator expressed it, "The homeowners would have gotten tax relief if no representative of any taxpayer or homeowner group had ever come to the Capitol" (p. 187).

Webb (1981, p. 169) in studying educational policy making in Arizona, asked four questions:

1. Who, in terms of identifiable special interest groups, agencies, institutions or individuals, sought to influence state legislators?

2. What were the major issues or concerns of these groups?

3. What strategies did they employ in attempting to influence legislators? and,

4. To what extent were they successful in having their demands translated into legislation?

This case study report presents the results of an investigation into the role of special interest groups in the shaping of state educational policy relative to school finance in Arizona.
What seems clear from Webb's (1981) study is that educational policy, at least that relative to school finance in Arizona, is not being shaped by any special interest groups, whatever their strategies. This is not to say that educational special interest groups should not exist, or that they should not be active in lobbying for school finance reform. What it does say is that those attempting to influence educational policy should make a real effort to be sensitive to the external forces and the impact they have upon the entire process. Directing energies or resources to strategies designed to shape policy without this knowledge is to operate in a vacuum.

Minimally, a fragmented, educational power structure consists of a collection of specialized groups undergoing organizational change even as they engage in a multitude of fluid alliances with and against each other. One might, therefore, expect that the power profile of an educational interest group would entail a narrow scope, that is, within effect largely limited to its area of special concern. It should have a medium to light weight because it typically faces competition from alternative groups in its area of specialty (Duane & Bridgeland, 1980).

Duane and Bridgeland (1980, p. 144) found two basic types of educational interest groups—the general focus and the special focus. The general focus had a statewide constituency and a multi-issue concern (traditional groups). The
special-focus interest groups had limited interest (geographical or substantive).

Some of the most effective lobbyists for education are not educators but groups like organized labor, civil rights and church groups, and general citizens associations, depending on the issue (Lewis & Moore, 1982). However, with increasingly effective organization at the state level, teachers are becoming an important influence on the shaping of educational policy in legislatures across the country (James, 1968).

Milstein and Jennings (1972, p. 67) found the most important power base of a group according to New York legislators is its size or voting strength. The next underlying factor is their knowledge/expertise/status bases. Legislators were more concerned about the interest groups' membership at the local level; "educators back home" are, in reality, the local arms of the educational interest groups. Educational interest groups concentrate their activities in the hands of a few men at the state capitol and ask their memberships to influence legislators from their home districts. Legislators feel that groups, educational and non-educational, in their districts are more important than are the formal, interest group representatives in the states' capitols in influencing their actions. So long as legislators believe that the process operates differently than do interest group leaders, interest group strategies will remain less than optimally effective.
The findings of a study by Milstein and Jennings (1972, p. 69) indicate that the New York state legislature may not be so readily approached through traditional, educational interest group influencing strategies as it has been in the past. The independence of legislators from the legislative leadership, which responding legislators report, indicates that educational interest group leaders may have to differentiate their strategies within the legislature. If the leaders of the legislature do not have a firm control over the legislators, the interest group leaders may have no choice but to invest greater resources in seeking out broader circles of non-leader legislators.

The review of literature on influences on the state educational policy-making process seems to be in discord when comparing various states. For example, organized educators might be very influential in the legislative process in one state and completely noninfluential in another state. Each state's unique political environment seems to help determine who can influence and who cannot. However, the literature shows there are at least some common similarities state by state, such as influentials, that are seen as being able to render authoritative decisions. Influence is consistently dependent on access to resources such as office, information, wealth, and votes.

The Texas Legislature

Texas' prevailing pattern of pedagogical politics rests upon the linkages between the legislature and the organized
education profession as a lobby (Lockard, 1969). Texas politics is distinctive in many ways, and some familiarity with its unique characteristics is requisite to an understanding of the politics of education in Texas. The state has had a long tradition of conservatism which still prevails in most aspects of Texas state government, including the legislature. Because the state is so large, the legislature is divided into many contending groups along both geographic and political lines. The office of the governor of Texas is one of the weakest in the nation. This weakness promotes the power of the legislature. These and other aspects of Texas politics have influence on the politics of Texas education (Usdan et al., 1969).

A major factor in influencing the legislative process in most states is the contention between opposing political parties which substantially determines the organization of the legislature and the filtering of political proposals. In Texas, however, the one-party dominance in state politics was traditional for so long that no such partisan conflict shaped the legislative process. The recent growth of the Republican Party, a considerable increased concern within party ranks for more effective organization and activity at the state level, and the effects of continuing redistricting has increased Republican participation and representation in the legislature and gradually redressed the long-standing imbalance in state politics. By the 1980s, Texas politics
was breaking out of its post-Civil War pattern of Democratic party domination, and partisan politics were beginning to play a larger role in public policy making. The political influences operative in the legislature are essentially those produced by fractionalism in the Democratic Party: liberals versus conservatives, with most legislators customarily aligned with one or the other (Texas Legislative Handbook, 1974).

In his study, Lemann (1985, pp. 28-36) found the ideological intensity in national politics is bringing to an end in Texas the biggest one-party state political system in the country, but within Texas, there's an unusually high degree of consensus on local issues. As recently as 10 years ago, the Texas legislature was a battleground where the political and cultural arguments of the '60s were still being settled. Now, when the state government feels called upon to do more with less money, Texas politics have changed remarkably. In 1983, the new Democratic governor of Texas, Mark White, appointed the computer magnate, H. Ross Perot, a Republican with a reputation as an ultra-conservative, to study public education in the state. Perot recommended raising taxes to pay for higher teacher salaries, equalizing the finances of rich and poor school districts, and de-emphasizing football—an agenda that might have been considered liberal if it had come from another source. In a 1984 special session the Texas legislature passed Perot's program substantially intact.
The main source of consensus on how to run the state involves the loss of oil revenues. The state comptroller says that for every dollar by which the price of a barrel of oil falls, the state government loses $100 million a year in revenue. It’s not just the state government but the whole economy that is losing its "engine of plenty." As the feeling that there will never be another sustained oil boom spreads, Texas politics is passing out of its Gilded Age and into a Progressive Era. Strong state government, an unpopular idea in the late 1970s, seems appealing now as a way to manage a transition to a more orderly, less spectacular kind of prosperity (Lemann, 1985, pp. 28-36).

Killian (1984, pp. 192-195) found that local school boards and school administrators in Texas have long complained of intrusions by the state and federal governments into the schools. The myriad state and federal reports and guidelines, which have always accompanied state and federal funds, have been a source of irritation but little more.

Despite the restrictions attached to the receipt of state and federal funds, local school boards in Texas have traditionally enjoyed substantial autonomy in providing for the education of the children within their districts. The state legislature and the state board of education have specified only that each of the more than 1,100 independent school districts in Texas must provide a "well-balanced curriculum"--giving local boards considerable latitude in
defining and implementing that directive. Now, suddenly and dramatically, the rules of the game have changed.

Under the virtuous banner of reform, a more fundamental and far-reaching revolution is taking place in Texas education. In exchange for reform, Texas citizens have quietly surrendered their control over the education of their children. In Texas, educational reform has meant more state control. From now on, the primary function of local school boards will be to implement state mandates (Killian, 1984, pp. 192-195).

Clearly, Texas has moved, in a very short time, from limited to tight state control of public education. In the process, Texas has moved into a leadership role in the national quest for educational excellence.

Summary

Generalizing about state legislatures and the hosts of factors that influence them rests upon a complex combination of facts. The political system is maintained through conflict, compromise, and resolution. The legislature has perpetuated the political system through representation. However, as legislatures continue to mature, methods of representation become more elaborate (Whitehill, 1976, p. 59). The legislature as a political system involves a multitude of interactions with its function being to make choices from among competing demands made by individuals and groups for the allocation of resources.
State legislatures have strengthened their positions within the states over the last decade. Changes in the legislature such as increased staffs, better work habits, and a greater capacity to perform legislative functions have made this greater assertiveness possible. Legislators are becoming better decision makers in providing for the assemblage of diverse interests, reconciling conflicting demands, and maintaining a degree of consensus.

Legislative politics is embedded in the social phenomenon of the power of some individual or group of individuals. All people do not have equal influence or power. Their legislative bases of influence and power vary according to their control over wealth and other resources, control over information and communications, and legislative rules and structure as well as many other factors.

Educational policy making by state legislatures presents a new pattern today. Some of the forces that caused these changes were taxpayer revolts, feeling of decline in the quality of public education, and collective bargaining. Many educators feel there is chaos and fragmentation in educational policy making because of the growing reliance on the legislative process. Influence on the educational policy-making process has become more diffuse over the past several years. The policy process is no longer a closed system but is open to any group or individual who is familiar with the avenue of access. The internal as well as external
influences on state legislature may be the governor, individual legislators, legislative processes, coalitions, information, state agencies, constituents, political parties, legislative staffs, interest groups, and many others.

The Texas legislature has been traditionally conservative. The one-party dominance has generally not allowed for partisan conflict to shape the legislative process. However, since the 1980s this tradition has been steadily changing to more of a two-party state. Texas is moving to a stronger state government partly through federal influence and partly as a way to manage the transition from an economic base of oil revenues to a more diverse economy in high technology and service areas.

Importance of Study

Milstein and Jennings (1973) have stated that the study of the educational policy-making process at the state level is of particular contemporary importance for several reasons. Recently states have begun to allocate increases in their level of support for education. Also, many state legislatures and governors have begun to interpret their roles in education policy-making as active rather than passive. Third, as the state increases allocations, interest groups increase their state-level activities to procure their "fair share" of state resources. And finally, until recently, education, specifically at the state level, has not been thought of as an area for
study in terms of politics from which policies emerge.

(pp. 6-7)

Historically, systematic analysis of the Texas legislature and its effect on education policy has been limited. In order to better understand their state government, Texas public school employees, citizens of local communities, and parents need to examine the legislative process, specifically the legislators and influences which impact changes in public education in Texas. It is hoped that this study will contribute to education literature by increasing the ability of citizens to see the vital connection between politics and education. Educational leaders can secure the largest share of resources for the schools when they are politically effective.
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CHAPTER III

METHODS AND PROCEDURES

Introduction

This chapter deals with the design of the research study and the methodology employed in gathering and analyzing the data necessary for answering the research questions. Measures for assessing influence are reviewed, and data collection procedures are summarized.

The major purposes of this study are (a) to identify and describe changes in environmental conditions which led to the enactment of House Bill 72, (b) to identify the actors and their perceived degree of influence, and (c) to assess reasons for the influence of groups and individuals on the enactment of House Bill 72. In order to fulfill these purposes, interviews with key actors in the 1984 special session of the 68th Texas legislature were conducted. The data were used to aid in the development of a questionnaire. All members of the 68th Texas legislature were then surveyed.

The following research questions are addressed in this study:

1. What environmental factors did legislators perceive as leading to educational reform in Texas in 1984?

2. Who were the most influential groups and individuals
involved in the formulation of legislators' views resulting in the enactment of House Bill 72?

3. Why were certain groups and individuals more important than others?

Chapter 3 describes the methodologies and procedures that were used to resolve these research questions. The six areas included in this chapter are the population, collection of data, the questionnaire, the interviews, treatment of the data, and measurement.

The Population

The population for this study consisted of all members of the 1983-85 68th Texas legislature (the Senate and the House of Representatives). There were 182 members of the combined assemblies (lieutenant governor, 31 senators, and 150 representatives). All 182 members were surveyed except 3 members who could not be located by phone or available addresses. Seven members declined to respond to the survey. One hundred forty-three members of the 68th legislature were also members of the 69th legislature. This enabled the researcher to conduct interviews and administer the questionnaire to these members while they were in Austin for the special session of August-September 1986. Thirty-nine were not members of the 69th legislature. Their questionnaires were mailed to their homes and businesses.

The 1983-85 House of Representatives was composed of 138 men and 12 women. The Senate was all male. Seventy-six
percent of the members of the combined assembly were between the ages of 34 and 56. Seventy-eight percent were Democrats, and 22% were Republican. The governor was a Democrat. Eighty-three percent were Anglo, 10% were Black, and 1% were Hispanic. The average years of experience in the legislature was 9. Thirty-seven percent were attorneys, 38% were businessmen and women, and 25% were in other fields. Seventy-eight percent had college or graduate degrees.

The Interviews

Open-ended interviews were conducted during August and September of 1986 with persons instrumental in the passage of House Bill 72 during the 1984 special session of the 68th Texas legislature. These 19 people (see Appendix A) were identified by a key education lobbyist heavily involved in the process, by doctoral committee members during the proposal seminar, and by the researcher from media reports published during the special session. The interview questions were derived from the research questions of the study (see Appendix B). Because of the uniqueness of this educational reform event, the researcher believed that the literature would not provide sufficient information for the development of a concise, valid survey instrument. Therefore, interviews seemed to be an appropriate way to gather information about the primary factors, individuals, and groups involved in the process.

The interview schedule consisted of seven questions
which included the following:

1. In attempting to reconstruct the events leading up to and during the special session of 1984, please recollect as best as possible the kinds of things that occurred. What are some of the things that took place that you think caused reform legislation to come about in Texas?

2. Any time there is major educational reform passed by a state legislature there have probably been changes in conditions such as the economy (national and state), political changes, court decisions, voter views, party leaders, interest groups, etc.

In your opinion, what were the primary changes in conditions, in the nation and Texas, prior to the 1984 special session that led to the development of House Bill 72?

3. During the weeks prior to and during the special session, legislators were subject to considerable lobbying efforts from individuals and groups, both in and outside of the state legislature. Within the legislature there were colleagues, committee chairmen, legislative leaders, etc.

What were the primary forces and who were the major actors within the legislative system that influenced legislators during this time?

4. Outside the legislature there were agency personnel,
interest groups within the education community, lobbyists, constituents, etc. What were the primary forces and who were the major actors outside the legislative system that influenced legislators during this time?

5. Who would you name as three of the most significant actors (individuals or groups) who influenced the passage of House Bill 72?

6. Now that you have named individuals and groups who influenced the passage of House Bill 72, what do you feel are the bases of their influence?

7. It appears that without the changes in environmental factors which we have been discussing House Bill 72 probably would not have come about. What would be your response to this idea?

The interviews were semistructured with the researcher following the sequence of questions, while being free to interject points of clarification and probing questions in response to certain statements by the interviewee.

All interviews were conducted by the researcher with personal visits (one by telephone) to each interviewee's office. Each interview lasted from 30 minutes to 1 hour. Most interviews were conducted during the week of August 11-15, 1986, while the 69th Texas legislature was in special session. This made it convenient for the researcher since the interviewees were in Austin. The remaining interviews
were conducted in Dallas prior to and after the Austin interviews.

Each interviewee received a letter the week of August 4, 1986, requesting a short interview with him and informing him that the writer would be in Austin during the week of August 11-15, 1986. Interviews were scheduled throughout the week at the convenience of the interviewees.

All interview sessions were recorded with the approval of the interviewee. The interview schedule was built around identifying why education reform became a dominant issue in the Texas legislature in 1984, who the key influentials were on the reform, and why they were influential. The reasons for recording were to avoid having to take notes during the interview and to be sure the data which would be used for constructing the questionnaire were complete.

The Questionnaire

Based on a review of the literature with respect to influence on state legislatures and personal interviews with key actors in the 1984 special session of the 68th Texas legislature, a survey instrument was developed. Transcripts of the interviews were read several times by the writer. Items mentioned by the interviewees most frequently were included in the first draft of the questionnaire sent to a panel for review. Content and face validation of the questionnaire involved a panel of four persons (see Appendix C). Each one was selected from university education
faculties, lobbyists, former members of the Texas legislature, and members of the Texas Research League. Panel members were mailed the first draft of the questionnaire with a cover letter explaining their role (see Appendix D). Each panel member had previously received a phone call, followed by a letter confirming their agreement to serve as panel members for this study. The letter explained that the validation of the questionnaire was essential to assure that the instrument was consistent and measured what it purported to measure. They were given the option of adding or deleting items. The panel examined each item and had the opportunity to add items. Approval by a majority of the four-member panel was necessary for each item to be included. The purpose of the questionnaire was to identify factors influential in the process of enacting House Bill 72 and to determine their perceived degree of importance by legislators of the 68th legislature. Due to the researcher's efforts to administer the questionnaire to legislators while in special session in September 1986, time constraints required that each panel member be called for his/her input into the development of the questionnaire rather than waiting for written responses. Two panel members had no recommendations stating it was a very good questionnaire. One member suggested changing the wording on one question, and the other suggested omitting one item. The researcher agreed and complied with the two recommendations. The major and minor
professor, along with an education lobbyist, also reviewed the questionnaire and gave approval with no recommended changes.

The instrument (see Appendix E) constructed for this purpose was a one-page, front and back, form. It was found from the personal interviews that it was absolutely imperative that the questionnaire be a short, simple, one-page form in order to receive an acceptable return rate. The return rate of surveys of the Texas legislature is traditionally low. Because of the shortness of the questionnaire, the personal interview data became a primary source for addressing the third research question which was "Why were certain groups and individuals more important than others?" The researcher believed that this interview data adequately addressed the question because of the following:

1. The interview schedule specifically addressed the basis of influence in Question 6 (see Appendix B).

2. The interview subjects gave consistent responses as they discussed why certain groups and individuals were influential.

In keeping with the political systems approach, the first part of the questionnaire dealt with the environmental conditions, both national and state, that led to education reform and the forces that pressured the legislature to pass reform legislation. The second part of the instrument identified groups and individuals and assessed their degree of
influence. The remainder of the questionnaire asked about the specific influence of Ross Perot, sources of information, and demographic data. Most of the demographic information, including age, ethnicity, party affiliation, experience in the legislature, occupation, urban/suburban/rural, sex, and education were obtained from the 28th edition of *The Texas State Directory* (1986).

**Measurement**

Demographic data were summarized for the entire legislature as well as for the respondents to the questionnaire. These variables were used to describe the total population and the respondents. Frequencies and percentages were used to report variables such as party affiliation, sex, education level, occupation, size of area of residence, ethnicity, age, and years of legislative experience.

The importance of environmental conditions, influences within the legislature, and influences outside the legislature was assessed by a Likert-type scale. In responding to the items on this scale, the subjects indicated whether they felt each item had great influence, considerable influence, moderate influence, little influence, no influence, or whether they had no opinion.

**Collection of Data**

The timing of the study coincided with the 1986 special session of the 1985-87 69th Texas legislature. The 69th legislature was called into two consecutive special sessions,
one in August and another in September. The purpose of these special sessions was to deal with the state's budget crisis. Two education bills, which altered the student discipline portion of the original House Bill 72 and eased paperwork for teachers, were passed with little or no controversy. Based on the interviews, it is believed that the issues on the minds of legislators during this data collection period did not affect the accuracy of the legislators' responses to the research questions of this study.

As previously described, during August and September while the 69th legislature was in special session, 19 interviews with key actors in the 1984 special session of the 68th legislature were conducted. These interviews were conducted to answer some of the research questions of the study and to gather information to be used in the development of a questionnaire which was to be administered to all members of the 68th legislature.

The questionnaire was hand delivered by the researcher to members of the 69th legislature (who were also members of the 68th legislature) while they were in special session during September 1986. There were 39 members of the 68th legislature who were not members of the 69th legislature. Their questionnaires were mailed during the same time period to either their homes or businesses.

When the questionnaires were sent out the first time, each legislator was assigned a code number for the purpose of
identification during subsequent mailings. The first mailing included an explanatory cover letter and instructions (see Appendix F), the questionnaire (see Appendix E), and a self-addressed, postpaid, return envelope. After a 7-week interval, the returned questionnaires were identified by the code number, and those individuals who had not responded were called and notified of the second mailing to come in November. A second cover letter with instructions (see Appendix G), the questionnaire, and a self-addressed, postpaid, return envelope were included. Two mailings and personal phone calls resulted in a total response rate of 54% (N=99) (Senate 59%, House 53%). This left 83 members who did not respond.

The returned questionnaires were dated upon receipt and an early, average, and later return tabulation was done. On the first mailing, 53 were returned within the first 2 weeks, 13 were returned within the 3rd and 4th weeks, and 33 were returned after the second mailing. These data were analyzed to determine if there were any differences among the groups who responded early, average, or late. It seemed possible that certain legislators were more open in the legislative process than others and because of this openness, more willing to respond to questions about their behavior.

Analysis of the Data

Descriptive statistics were initially calculated. Frequency distributions and percentages were used to display
the data. If a respondent omitted one or more items this "missing data" was labeled as no answer on each table. There were some items upon which respondents had not made up their minds. These were recorded as no opinion responses.

Cross-tabulations were conducted with the area residents resided in and the time of response factors. Time of response showed no important trend to report. Area of residency did show trends as they related to certain variables of the questionnaire. After examining the cross-tabulation, the variables were recorded combining great and considerable influence and little and no influence. A chi-square was then calculated.

The next step in data analysis was to interpret relationships. Correlation coefficients were calculated to summarize the degree of relationship between pairs of variables. The product-moment correlation coefficient, $r$, was the statistic used to measure relationships for interval scale variables. The variables to be correlated are expressed as continuous scores. An appropriate correlation was calculated for any two variables, no matter how they had been measured.

A factor analysis was used to identify the common elements among the items and to provide a more parsimonious set of descriptors. The factor analysis was done on the 39 variables listed in sections I and II of the questionnaire. The analysis was conducted using the Statistical Package for
the Social Sciences (SPSS) factor analysis program. Principal factoring with iterations was the method used. The criterion used to determine the number of factors was eigenvalue equal to one. The $R^2$ for the correlation matrix was used as the initial communality estimate. An orthogonal varimax rotation was used.

Analysis of Interview Data

The 19 interviews that were recorded were transcribed by the researcher, word for word. Each interview was read several times by the researcher. Then the significant and relevant data from each interview was recorded on 3" x 5" cards. Once this was completed, the cards were categorized by the frequency of topics discussed. The information is reported in chapter 4 as it is used to help answer the question, "Why were certain groups and individuals more important than others?"
CHAPTER REFERENCE


Texas: Author.
CHAPTER IV

PRESENTATION AND ANALYSIS OF DATA

Introduction

The major purposes of this study are, (a) to identify and describe changes in environmental conditions which led to the enactment of House Bill 72, (b) to identify the actors and their perceived degree of influence, and (c) to assess reasons for the influence of groups and individuals on the enactment of House Bill 72. Data were collected by personal interviews of 19 key individuals involved in the enactment of House Bill 72 and by a questionnaire sent to all 182 members of the House and Senate of the 68th Texas Legislature.

The Legislators: Who Were They?

In the Texas state legislature, there are 150 available seats in the House of Representatives. Eighty members (53%) of the House of Representatives responded to the questionnaire. There are 31 individuals in the Texas Senate and one lieutenant governor. Nineteen members (59%) responded to the questionnaire. Of the combined House and Senate, 99 individuals (54%) responded to the questionnaire. For comparative purposes, the following tables of demographic information include data on the total 68th Texas legislature as well as data on the legislators who responded.
Percentages have been rounded to whole number; therefore, some do not total 100%.

Tables 1, 2, and 3 show the legislators' age, race, and sex. Of those who responded, most legislators (81%) ranged in age from 36 to 55 years of age with a few beyond either end of this range. Legislators were almost totally Anglo (89%). Only 4% were Black, and 6% were Hispanic. Ninety-four percent of the legislators were male, and only 5% were female.

Table 1
Age of Legislators

<table>
<thead>
<tr>
<th>Age</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n^a</td>
<td>%</td>
</tr>
<tr>
<td>26 - 35</td>
<td>15</td>
<td>15%</td>
</tr>
<tr>
<td>36 - 45</td>
<td>38</td>
<td>38%</td>
</tr>
<tr>
<td>46 - 55</td>
<td>25</td>
<td>25%</td>
</tr>
<tr>
<td>56 - 65</td>
<td>18</td>
<td>18%</td>
</tr>
<tr>
<td>Over 65</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>Missing Info.</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

Note. ^a_n = 99.  ^b_N = 182.

Table 4 indicates legislators' party affiliation. Seventy-nine percent of the legislators were Democratic, and 20% were Republican. The influence of party affiliation on legislators as they enacted HB 72 was not perceived by most
of the interviewees as being very important. The conservative versus liberal issue as it relates to influence on legislators as they enacted HB 72 also was not named by interviewees as an important variable.

Interviewee 10 states the general interviewee opinion:

I'm personally real confused as to whether the reform movement is a liberal or a conservative movement. I think the classic camps are muddied. The leaders of this in the legislature I clearly view as conservatives, but they were not Republican conservatives. Many of them were Democrats. Aspects of it were clearly highlighted by the new conservatism wave coming out of Washington. I think it partakes of both. It's almost a populist movement which draws a little from classic liberal and conservatism.

Table 2
Race of Legislators

<table>
<thead>
<tr>
<th>Race</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n&lt;sup&gt;a&lt;/sup&gt;</td>
<td>%</td>
</tr>
<tr>
<td>Black</td>
<td>4</td>
<td>4%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>6</td>
<td>6%</td>
</tr>
<tr>
<td>Anglo</td>
<td>89</td>
<td>89%</td>
</tr>
</tbody>
</table>

Note. <sup>a</sup>n = 99. <sup>b</sup>N = 182.
Table 3

Sex of Legislators

<table>
<thead>
<tr>
<th>Sex</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n²</td>
<td>%</td>
</tr>
<tr>
<td>Male</td>
<td>94</td>
<td>94%</td>
</tr>
<tr>
<td>Female</td>
<td>5</td>
<td>5%</td>
</tr>
</tbody>
</table>

Note. ²n = 99. ³N = 182.

Table 4

Party Affiliation of Legislators

<table>
<thead>
<tr>
<th>Party</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n²</td>
<td>%</td>
</tr>
<tr>
<td>Democrat</td>
<td>79</td>
<td>79%</td>
</tr>
<tr>
<td>Republican</td>
<td>20</td>
<td>20%</td>
</tr>
</tbody>
</table>

Note. ²n = 99. ³N = 182.

The interview data relating to party affiliation and the conservative versus liberal issue are placed in Appendix H for the reader to review for information purposes only. It is not dealt with in any other way throughout the study.

Table 5 shows the largest percentage of the legislators responding had a JD or a PhD degree (32%) with the next highest percentage having a bachelor's degree (29%).
Table 5

**Education Level of Legislators**

<table>
<thead>
<tr>
<th>Education</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n&lt;sup&gt;a&lt;/sup&gt;</td>
<td>%</td>
</tr>
<tr>
<td>High School Diploma</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>Some College</td>
<td>22</td>
<td>22%</td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td>29</td>
<td>29%</td>
</tr>
<tr>
<td>Master's Degree</td>
<td>13</td>
<td>13%</td>
</tr>
<tr>
<td>JD, PhD&lt;sup&gt;c&lt;/sup&gt;</td>
<td>32</td>
<td>32%</td>
</tr>
</tbody>
</table>

Note. <sup>a</sup>n = 99. <sup>b</sup>N = 182. <sup>c</sup>Only two Legislators received PhDs.

Table 6 indicates a breakdown by occupational groups. Most responding legislators listed their occupation as businessman, businesswoman, or attorney. The least frequent occupations given were education, farming, professional (architect, engineer), and public service. Two legislators were retired, one legislator was a homemaker, and one was self-employed.

The majority of the legislators responding had from 0 to 3 years of experience in the legislature (41%). The next highest category of legislative experience was in the 4 to 7 years of experience category. The remaining had over 8 or more years of legislative experience (Table 7).
### Table 6

**Occupation of Legislators**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>%</td>
</tr>
<tr>
<td>Businessperson</td>
<td>41</td>
<td>41%</td>
</tr>
<tr>
<td>Attorney</td>
<td>33</td>
<td>33%</td>
</tr>
<tr>
<td>Educator</td>
<td>7</td>
<td>7%</td>
</tr>
<tr>
<td>Rancher/Farmer</td>
<td>7</td>
<td>7%</td>
</tr>
<tr>
<td>Other Professional</td>
<td>4</td>
<td>4%</td>
</tr>
<tr>
<td>Public Service</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>Skilled/Semiskilled</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Homemaker</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Retired</td>
<td>2</td>
<td>2%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

Note. a\(n = 99\). b\(N = 182\).

Legislators were asked to identify the area they resided in as urban, suburban, or rural (Table 8). Legislators responding were quite evenly divided.

The demographic data show the legislators as being very representative of the total population (refer to Tables 1
Table 7

Legislative Experience of Legislators

<table>
<thead>
<tr>
<th>Years</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n^a</td>
<td>%</td>
</tr>
<tr>
<td>0 - 3</td>
<td>41</td>
<td>41%</td>
</tr>
<tr>
<td>4 - 7</td>
<td>21</td>
<td>21%</td>
</tr>
<tr>
<td>8 - 11</td>
<td>17</td>
<td>17%</td>
</tr>
<tr>
<td>Over 12</td>
<td>11</td>
<td>11%</td>
</tr>
<tr>
<td>Missing</td>
<td>9</td>
<td>9%</td>
</tr>
</tbody>
</table>

Note. a_n = 99. b_N = 182.

through 8). No major departures from the population figures were found.

Major Areas of Influence

Data gathered from interviews and a review of the literature showed that six major areas of possible influence on the enactment of House Bill 72 were:

1. National environmental conditions - Any time there is major educational reform passed by a state legislature, there have probably been changes in environmental conditions.

2. State environmental conditions - Any time a state legislature passes major legislation, there have probably
Table 8
Type of Residency

<table>
<thead>
<tr>
<th>Area</th>
<th>Legislators</th>
<th>Total Legislature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n^a</td>
<td>%</td>
</tr>
<tr>
<td>Urban</td>
<td>35</td>
<td>35%</td>
</tr>
<tr>
<td>Suburban</td>
<td>35</td>
<td>35%</td>
</tr>
<tr>
<td>Rural</td>
<td>29</td>
<td>29%</td>
</tr>
</tbody>
</table>

Note. ^a_n = 99. ^b_N = 182. Data for Total Legislature not available by area.

been changes in state environmental conditions which impact the legislature.

3. Influences within the legislative system - The state legislature has its own internal system of political influence that is significant in the passage of major legislation.

4. Influences outside the legislative system - The state legislature receives demands from groups and individuals who seek to influence the passage of major legislation.

5. Ross Perot - Ross Perot was a major actor in the passage of House Bill 72 whose influence was an important factor.
6. Sources of information - Information used by legislators as they voted on this major legislation was supplied by many sources, and it is important to know which sources were most often used.

Table 9 shows the frequency of items, in rank order, most often mentioned by interviewees in response to the interview questions. The interview data were used to identify and describe the variables that might have influenced legislators as they voted on educational legislation during the special session of 1984. The questionnaire was then developed from the interviews and used to identify and assess the extent to which variables influenced legislators as they voted on House Bill 72 and the extent of their influence. National and state environmental conditions, as well as political influences within and outside the legislative system, were used to find who and what influenced the enactment of House Bill 72. Chapter 4 will present data on the influence of environmental conditions (social, economic, and cultural) of the nation and the state of Texas and of the political system of the Texas legislature, both internal and external, as HB 72 was legislated.

The questionnaire data collected are shown in this chapter in frequency and percentage distribution tables developed for each section of the questionnaire. Correlation coefficients were calculated for the 39 variables for the
Table 9

Frequency of Response to Interview Questions

In your opinion, what were the primary changes in conditions, in the nation and Texas, prior to the 1984 special session that led to the development of House Bill 72?

<table>
<thead>
<tr>
<th>I. National Environmental Conditions</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. National reports</td>
<td>14</td>
<td>74%</td>
</tr>
<tr>
<td>2. National public perception of educational decline</td>
<td>10</td>
<td>53%</td>
</tr>
<tr>
<td>3. Educational reform in other states</td>
<td>9</td>
<td>47%</td>
</tr>
<tr>
<td>4. Involvement in reform made popular by Reagan</td>
<td>9</td>
<td>47%</td>
</tr>
<tr>
<td>5. National economic issues</td>
<td>8</td>
<td>42%</td>
</tr>
<tr>
<td>6. Federal fiscal retrenchment</td>
<td>7</td>
<td>37%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State Environmental Conditions</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Equalization of school finance</td>
<td>16</td>
<td>84%</td>
</tr>
<tr>
<td>2. Legislators' demand for educational accountability</td>
<td>11</td>
<td>58%</td>
</tr>
<tr>
<td>3. Public's demand for improvement in public education in Texas</td>
<td>11</td>
<td>58%</td>
</tr>
<tr>
<td>4. Business concern for economic welfare of state</td>
<td>10</td>
<td>53%</td>
</tr>
<tr>
<td>5. White's inability to raise teacher salaries</td>
<td>8</td>
<td>42%</td>
</tr>
<tr>
<td>6. No new state revenue</td>
<td>5</td>
<td>26%</td>
</tr>
<tr>
<td>7. Taxpayers roll back ability</td>
<td>4</td>
<td>21%</td>
</tr>
<tr>
<td>8. Texas behind other states in educational achievement</td>
<td>3</td>
<td>16%</td>
</tr>
<tr>
<td>9. Educational needs of businesses relocating to Texas</td>
<td>2</td>
<td>11%</td>
</tr>
</tbody>
</table>

*(table continues)*
Table 9

Frequency of Response to Interview Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>II. What were the primary forces and who were the major actors within the legislative system that influenced legislators during this time?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Speaker of the House</td>
<td>18</td>
<td>95%</td>
</tr>
<tr>
<td>2. Lt. Governor</td>
<td>16</td>
<td>84%</td>
</tr>
<tr>
<td>3. Governor</td>
<td>15</td>
<td>79%</td>
</tr>
<tr>
<td>4. House Education Committee</td>
<td>10</td>
<td>53%</td>
</tr>
<tr>
<td>5. Senate Education Committee</td>
<td>7</td>
<td>37%</td>
</tr>
<tr>
<td>6. Legislator's staff</td>
<td>2</td>
<td>11%</td>
</tr>
<tr>
<td>7. Other committees</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>What were the primary forces and who were the major actors outside the legislative system that influenced legislators during this time?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Ross Perot</td>
<td>19</td>
<td>100%</td>
</tr>
<tr>
<td>2. Teachers' education groups</td>
<td>15</td>
<td>79%</td>
</tr>
<tr>
<td>3. Select Committee on Public Education members</td>
<td>15</td>
<td>79%</td>
</tr>
<tr>
<td>4. Constituents</td>
<td>14</td>
<td>74%</td>
</tr>
<tr>
<td>5. Lobbyists for Ross Perot</td>
<td>12</td>
<td>63%</td>
</tr>
<tr>
<td>6. Comptroller</td>
<td>11</td>
<td>58%</td>
</tr>
<tr>
<td>7. Administrative/school board education groups</td>
<td>9</td>
<td>47%</td>
</tr>
<tr>
<td>8. Media</td>
<td>9</td>
<td>47%</td>
</tr>
<tr>
<td>9. Lobbyists of business interests</td>
<td>8</td>
<td>42%</td>
</tr>
<tr>
<td>10. Chambers of Commerce</td>
<td>7</td>
<td>37%</td>
</tr>
<tr>
<td>11. Educators back home</td>
<td>7</td>
<td>37%</td>
</tr>
<tr>
<td>12. Texas Council of Urban Schools</td>
<td>6</td>
<td>32%</td>
</tr>
<tr>
<td>13. Texas Education Agency</td>
<td>6</td>
<td>32%</td>
</tr>
</tbody>
</table>

(table continues)
Table 9
Frequency of Response to Interview Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>14. State Board of Education</td>
<td>6</td>
<td>32%</td>
</tr>
<tr>
<td>15. Public interest groups</td>
<td>6</td>
<td>32%</td>
</tr>
<tr>
<td>16. Equity Center</td>
<td>5</td>
<td>26%</td>
</tr>
<tr>
<td>17. MALDEF school finance lawsuit</td>
<td>4</td>
<td>21%</td>
</tr>
</tbody>
</table>

A factor analysis was conducted resulting in at least three factors under which all variables were grouped. A basic assumption of factor analysis is that a group of intercorrelated items has common factors running through it. It is based on measures of association. It provides procedures for the development of concepts. Since there were only 39 variables to be rotated, placing a lot of importance on factor analysis is not appropriate for this study. However, three factors emerged as interpretable. They are discussed on page 122 of this chapter.

Each variable of the questionnaire was cross-tabulated with time of response and with type of residency area to see if either affected response patterns. Time of response was consistently unimportant. Appendix I shows the number of early, mid, and late responses. A few variables showed different response patterns by type of residency area. A chi-square was calculated for each table. These are noted in the summary which appears with each frequency and percentage.
Influences of Environmental Conditions: National and State

National Environmental Conditions: Table 10

Interview discussions about national environmental conditions, along with a review of the literature, resulted in six national environmental conditions being identified as possibly influencing the enactment of HB 72. They were:

1. National reports such as "A Nation at Risk";
2. National economic issues (international competition, loss of U.S. industrial strength, etc.);
3. Federal fiscal retrenchment – emphasis on state financial responsibility for public education;
4. Educational reform in other states;
5. National public perception of decline in quality of public education;
6. Involvement in educational reform made popular by Reagan administration.

Fourteen of the 19 interviewees talked about national issues. The national conditions influencing the passage of HB 72 were generally not perceived to be as important as the state conditions by interviewees. For example, interviewee 11 said:
Table 10
Frequency and Percentage Distributions for National Environmental Conditions

<table>
<thead>
<tr>
<th>Conditions</th>
<th>Responses</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A</td>
<td>B</td>
</tr>
<tr>
<td>1. National reports (n)</td>
<td>14</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td>14.1</td>
<td>26.3</td>
</tr>
<tr>
<td>2. National economic issues (n)</td>
<td>13</td>
<td>32</td>
</tr>
<tr>
<td></td>
<td>13.1</td>
<td>32.3</td>
</tr>
<tr>
<td>3. Federal fiscal retrenchment (n)</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>7.1</td>
<td>17.2</td>
</tr>
<tr>
<td>4. Educational reform in other states (n)</td>
<td>6</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>6.1</td>
<td>18.2</td>
</tr>
<tr>
<td>5. National public perception (n)</td>
<td>23</td>
<td>37</td>
</tr>
<tr>
<td>of educational decline (%)</td>
<td>23.2</td>
<td>37.4</td>
</tr>
<tr>
<td>6. Involvement in reform (n)</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>made popular by Reagan (%)</td>
<td>4.0</td>
<td>9.1</td>
</tr>
<tr>
<td>7. Other (n)</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td>3.0</td>
<td>2.0</td>
</tr>
</tbody>
</table>

Note: A = great influence; B = considerable influence; C = moderate influence; D = little influence; E = no influence; F = no opinion; G = no answer.
I don't believe HB 72 was a product of great vision of Texas needs in part with the world economy. National economy had influence only indirectly. It motivates a few people but only the very sophisticated who truly understand the relationship of education to international competition.

Interviewee 2 also referred to national conditions by saying:

I don't think the world economy, and the change from industrial to high technology and providing a work force for the future had much impact on what happened in Texas with educational reform. I think it was more of just an amazing combination of things.

The interviewees generally agreed that national environmental conditions set the stage for major reform in Texas as stated by interviewee 2, who said:

The major change was that education became a hot issue. "A Nation at Risk" came out. Suddenly reform became in vogue for politicians to be interested in. That set the public mode for reform.

Other statements referring to national conditions can be found in Appendix K.

Influences of the national and state environmental conditions that impacted HB 72 are given in Tables 10 and 11. These tables show frequency and percentage distributions of legislators' responses to the questionnaire. Findings of
a cross-tabulation of area of residency and the variables in Tables 10 and 11 are presented where a significant relationship was found.

The questionnaire addressed national environmental conditions by asking legislators to respond to the question, "Anytime there is major educational reform passed by a state legislature, there have probably been changes in environmental conditions. How would you assess the following on the enactment of House Bill 72 in Texas?" This question was followed by a list of six specific national environmental conditions developed from the interview data and an other category, which could be filled in. The legislators could check each condition as having great influence, considerable influence, moderate influence, little influence, or no influence. A no opinion category was also provided. No opinion and no answer were both treated as missing data throughout the analysis but are included here for the reader to see. Table 10 summarizes the legislator's responses to each of the national environmental conditions.

National public perception of decline in the quality of public education was viewed by 61% of the legislators as having great or considerable influence on HB 72. Another 24% thought it had moderate influence. National economic issues were seen as having great or considerable influence by 45% of the legislators with 32% saying it had moderate influence. National reports such as "A Nation at Risk" were viewed by
40% of the legislators as having **great** or **considerable influence**. Twenty-nine percent viewed it as having **moderate influence**. Other national environmental conditions were perceived by legislators as having much less influence. Involvement in educational reform made popular by the Reagan administration was rated by 62% of the legislators as having **little or no influence**. Educational reform in other states and federal fiscal retrenchment (emphasis on state financial responsibility for public education) showed 49% and 46% respectively of the legislators perceiving them as having **little or no influence** on the enactment of HB 72. The other category showed no common trend in conditions listed.

In comparing legislators from urban, suburban, and rural areas, a higher percentage of rural legislators (67%) perceived federal fiscal retrenchment (emphasis on state financial responsibility for public education) as having **little or no influence** than was true of the urban and suburban legislators (urban 38%, suburban 44%). Area of residency appeared unrelated to any of the other national environmental conditions.

**State Environmental Conditions: Table 11**

The state environmental conditions most often discussed by interviewees were school finance equalization issues, legislator and public concern for improvement in public education in Texas and economic concerns of Texas business and industry. Other conditions discussed were:

(a) Texas
behind most other states in educational achievement, (b) educational needs of businesses relocating to Texas, (c) Governor White's inability to fulfill 1982 campaign promise of pay raise for teachers, (d) no new state revenue surplus due to the stabilization of oil and gas prices, and (e) taxpayers' ability to roll back local ad valorem taxes. Sixteen of the 19 interviewees discussed the equalization issue. Some typical comments were:

Interviewee 12:

It had been recognized that Texas did not have a truly equitable system of distributing state funds for public school finance. It was pretty obvious that if we didn't bring a high level of equity to that distribution that we might well find ourselves in federal court. The system we used simply did not recognize the difference in cost of education in urban versus rural districts.

Interviewee 13:

The old economic index became widely recognizable as inadequate for distributing state aid. We had become very disequalized. About 1973, Rodriguez case out of Edgewood ISD, the appellate court said the situation is terrible, so we just don't want to get into it. Legislators were somewhat concerned with equalization in the '70s but were mainly concerned with pumping billions of more dollars every biennium into the system.
Table 11
Frequency and Percentage Distributions for State Environmental Conditions

<table>
<thead>
<tr>
<th>Conditions</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Legislators' demand for educational accountability (%)</td>
<td>26</td>
<td>43.4</td>
<td>10.1</td>
<td>11.1</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
</tr>
<tr>
<td>2. Texas behind other states in educational achievement (%)</td>
<td>26</td>
<td>37.4</td>
<td>20.2</td>
<td>9.1</td>
<td>3.0</td>
<td>2.0</td>
<td>2.0</td>
</tr>
<tr>
<td>3. Educational needs of businesses relocating to Texas (%)</td>
<td>20</td>
<td>37.4</td>
<td>27.0</td>
<td>10.1</td>
<td>2.0</td>
<td>1.0</td>
<td>2.0</td>
</tr>
<tr>
<td>4. Public's demand improvement in public education in Texas (%)</td>
<td>29</td>
<td>33.3</td>
<td>26.2</td>
<td>6.1</td>
<td>5.1</td>
<td>0</td>
<td>2.0</td>
</tr>
<tr>
<td>5. White's inability to raise teacher salaries (%)</td>
<td>13.1</td>
<td>17.2</td>
<td>21.1</td>
<td>23.2</td>
<td>25.3</td>
<td>4.0</td>
<td>3.0</td>
</tr>
<tr>
<td>6. No new state revenue (%)</td>
<td>6</td>
<td>14</td>
<td>16</td>
<td>28</td>
<td>24</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>7. Business concern for economic welfare of state (%)</td>
<td>7</td>
<td>26</td>
<td>33</td>
<td>23</td>
<td>4</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>8. Equalization of school finance (%)</td>
<td>26.3</td>
<td>38.3</td>
<td>28.3</td>
<td>9.1</td>
<td>3.1</td>
<td>0</td>
<td>2.0</td>
</tr>
<tr>
<td>9. Taxpayers roll back ability (%)</td>
<td>2</td>
<td>12</td>
<td>22</td>
<td>27</td>
<td>30</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. Other (%)</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>90</td>
</tr>
</tbody>
</table>

Note: A = great influence; B = considerable influence; C = moderate influence; D = little influence; E = no influence; F = no opinion; G = no answer.
The public and legislative demand for accountability and improvement in public education in Texas was discussed by 11 of the interviewees. This issue was, however, referenced at least once by all the interviewees as they discussed other issues. Interviewee 5 sums up the general statements by interviewees with, "The public was saying 'I'm worried about my child's education and the quality of it, and I think it's less.'" The legislative demand for accountability was well stated by Interviewee 13:

In the early '80s, the emphasis shifted from appropriating a bunch of more money every year to accountability. The Speaker in the 1983 regular session took a very strong position and said he would not pass a tax bill for increased teacher salaries until we do something about the quality of education.

However, there were other interviewees that did not feel it was the legislative and public demand for improvement that brought about HB 72 but much more of a political movement involving state leadership and outside influences on the legislature. For example, Interviewee 11 said:

Influence on the legislators was not strongly coming from the constituents. Then they started hearing about it and they started agreeing with it. Most of the time it is that we give opinions sort of like we get information. I think 90% of our citizens get their information from television. And you get it in capsule
form. And we get back input in capsule form. Like, "I don't want to pay a sorry teacher the same thing I pay a good one. I want there to be a difference." We keep hearing that and when we direct it and say that means you then support career ladder, we can attach our plan to public sentiment. That's kinda the way things work today more than there being great public outcry (some exceptions exist).

He also said, "There was not a real grass-roots movement. It was the grass-roots acceptance of the principles in HB 72. There wasn't a hue and cry for sweeping change."

The business and industry concern about the critical need for a highly educated work force for the future of the Texas economy was discussed by 10 of the 19 interviewees. Interviewee 16 expressed the general viewpoint:

Leadership saw it as an economic type of situation. With the governor's push to bring Micro Electronics and Computer Consortium to Texas, it became apparent that a good education system was a must for us to prosper in the post-oil year booms. It was necessary for us to diversify the economy.

Interviewee 9 said, "There was desire on the part of a lot of people concerned with the Texas economy to make sure there was economic growth and the realization that education was one big piece of that."

Other statements referring to state conditions can be found in Appendix L.
Interview discussions about state environmental conditions, along with a review of the literature, resulted in nine state environmental conditions being identified as possibly influencing the enactment of HB 72. The questionnaire addressed state environmental conditions by asking legislators to respond to the question, "Anytime there is major educational reform passed by a state legislature, there have probably been changes in environmental conditions. How would you assess the following on the enactment of House Bill 72 in Texas?" This question was followed by the nine specific state environmental conditions and an other category, which could be filled in. The legislators could check each condition as having great influence, considerable influence, moderate influence, little influence, or no influence. A no opinion category was also provided. Table 11 summarizes the legislative response to each of the state environmental conditions.

Legislators' demand for educational accountability was clearly the most influential state condition with 70% saying it had great or considerable influence on educational reform. Legislators perceiving Texas as behind most other states in educational achievement was rated by 64% of the legislators as having great or considerable influence. The public's demand for improvement in public education in Texas was rated by 63% of the legislators as having great or considerable influence. Over 50% of the legislators viewed
the educational needs of businesses relocating to Texas and the need to address equalization of school finance of Texas as having great or considerable influence on the enactment of HB 72. Variables showing legislators perceiving them as having little or no influence on HB 72 were taxpayers' ability to roll back local ad valorem taxes (58% of legislators), no new state revenue surplus due to the stabilization of oil and gas prices (53% of legislators), and Governor White's inability to fulfill 1982 campaign promise of pay raise for teachers because of budget constraints (49% of legislators).

The other category was used most often to make comments related to the need to improve public education in Texas. Specific comments included "political need by state leaders to do something" and "public's demand for educational accountability."

In comparing urban, suburban, and rural legislators' ratings, the need to address equalization of school finance in Texas was perceived by 65% of the suburban legislators and 60% of the urban legislators as having great or considerable influence, while 32% of the rural legislators indicated it had little or no influence. When area represented and the need to address equalization of school finance in Texas were cross-tabulated, the chi-square of 10.15 with 4 degrees of freedom was significant at the .04 level. There is a significant relationship between area of residency and the equalization issue. There was a fairly even split (39.3% to
28.6%) among rural legislators' attitudes about the degree of influence the equalization issue had on HB 72. However, there was a marked difference in the suburban and urban legislators with over 60% saying the equalization issue had great or considerable influence on HB 72 (see Appendix J).

A cross-tabulation of area of residency and legislators' demand for education accountability showed a chi-square of 12.56 with 4 degrees of freedom. Significance at the .01 level was found. There is a significant relationship between area of residency and legislators' demand for accountability. Seventy-five percent of the rural legislators said legislators' demand for accountability had little or no influence. The suburban and urban legislators were fairly evenly divided as to the degree of influence demand for accountability had on HB 72 (see Appendix J).

When looking at both national and state environmental conditions that influenced the enactment of HB 72, most legislators viewed legislators' demand for educational accountability as clearly the most influential condition. The next two conditions, in order of importance, were that Texas was perceived to be behind most other states in educational achievement, and the public was perceived to be demanding improvement in public education in Texas. National public perception of decline in quality of public education received the fourth highest ratings of great or considerable influence. The conditions perceived as having the least
influence were involvement in education reform made popular by the Reagan administration with the highest percentage of little or no influence. The state condition of taxpayers' ability to roll back taxes and their being no new state revenue surplus were the next least influential, respectively. Overall, state environmental conditions appear to have been more influential than national environmental conditions.

Influences of the Political System

Influences within the legislative system and outside the legislative system that impacted HB 72 are given in Tables 12 and 13. These tables show frequency and percentage distributions of legislators' responses to the questionnaire. Findings of a cross-tabulation of area of residency and the variables in Tables 12 and 13 are presented where a significant relationship was found. Interview data used to identify these variables are also presented. The primary reasons for Ross Perot's influence are shown in Table 14. Sources of information most often used by legislators are shown in Table 15.

Influences Within the Legislative System: Table 12

Interview discussions about influences within the legislative system, along with a review of the literature, resulted in seven variables being identified as possibly influencing the enactment of HB 72. They were (a) governor, (b) lieutenant governor, (c) Speaker of the House, (d) House
Legislative committees other than Education, (g) legislator's staff. Legislative leaders were discussed by most interviewees. Fifteen of the interviewees discussed the role of the governor, 16 the role of the lieutenant governor, and 18 the role of the Speaker of the House. Some of the more frequent comments made were as follows:

Interviewee 5:

The major reasons why educational reform ultimately prevailed is that Lewis and Hobby were united in wanting to accomplish this. When the two are working together on something that is a very formidable combination.

Interviewee 15:

Hobby is the most powerful man in state government. He appoints the chairs in the Senate. There are only 31 members in the Senate. He’s a man with a tremendous amount of power. Hobby is powerful because of his appointment powers and because of himself. He commands respect that no other does.

Basis of influence ultimately boils down to knowledge of and ability to utilize facts and information. Speaker, lieutenant governor, Perot and others were able to get those facts together. If you’ve got the governor, lieutenant governor, and the Speaker absolutely hitched to a program they can move mountains in a hurry. Happens very seldom. Almost never seen it.
<table>
<thead>
<tr>
<th>Influences</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Governor (n)</td>
<td>19</td>
<td>11</td>
<td>17</td>
<td>19</td>
<td>30</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>(%)</td>
<td>19.2</td>
<td>11.1</td>
<td>17.2</td>
<td>19.2</td>
<td>30.3</td>
<td>0</td>
<td>3.0</td>
</tr>
<tr>
<td>2. Lt. Governor (n)</td>
<td>21</td>
<td>14</td>
<td>19</td>
<td>18</td>
<td>23</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>21.2</td>
<td>14.1</td>
<td>19.2</td>
<td>18.2</td>
<td>23.2</td>
<td>0</td>
<td>4.0</td>
</tr>
<tr>
<td>3. Speaker of the House (n)</td>
<td>24</td>
<td>17</td>
<td>18</td>
<td>16</td>
<td>20</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>24.2</td>
<td>17.2</td>
<td>18.2</td>
<td>16.2</td>
<td>20.2</td>
<td>0</td>
<td>4.0</td>
</tr>
<tr>
<td>4. House Education Committee (n)</td>
<td>9</td>
<td>15</td>
<td>35</td>
<td>17</td>
<td>20</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td>9.1</td>
<td>15.2</td>
<td>35.4</td>
<td>17.2</td>
<td>20.2</td>
<td>1.0</td>
<td>2.0</td>
</tr>
<tr>
<td>5. Senate Education Committee (n)</td>
<td>7</td>
<td>10</td>
<td>21</td>
<td>23</td>
<td>31</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>(%)</td>
<td>7.1</td>
<td>10.1</td>
<td>21.2</td>
<td>23.2</td>
<td>31.3</td>
<td>4.0</td>
<td>3.0</td>
</tr>
<tr>
<td>6. Other committees (n)</td>
<td>6</td>
<td>5</td>
<td>9</td>
<td>29</td>
<td>41</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>6.1</td>
<td>5.1</td>
<td>9.1</td>
<td>29.3</td>
<td>41.4</td>
<td>5.1</td>
<td>4.0</td>
</tr>
<tr>
<td>7. Legislator's staff (n)</td>
<td>3</td>
<td>14</td>
<td>25</td>
<td>20</td>
<td>29</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>(%)</td>
<td>3.0</td>
<td>14.1</td>
<td>25.3</td>
<td>20.2</td>
<td>29.3</td>
<td>5.1</td>
<td>3.0</td>
</tr>
<tr>
<td>8. Other (n)</td>
<td>12</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>75</td>
</tr>
<tr>
<td>(%)</td>
<td>12.1</td>
<td>6.1</td>
<td>1.0</td>
<td>1.0</td>
<td>2.0</td>
<td>2.0</td>
<td>75.8</td>
</tr>
</tbody>
</table>

Note: A = great influence; B = considerable influence; C = moderate influence; D = little influence; E = no influence; F = no opinion; G = no answer.
Interviewee 4 conferred with his statement:

Select Committee on Public Education report read "The governor, lieutenant governor, Speaker of the House, comptroller, and Mr. Perot..." This unity was one basis of these leaders' influence.

Interviewee 11 summed up most interviewees' thoughts when he said:

The basis of their influence is elementary when the presiding officers of the legislature want something; they are tremendously influential. That's inherent in the position, through their power to appoint, power to decide on committees, and power to refer bills. The governor, lieutenant governor, and Speaker signed on with Perot early and committed themselves to the core of recommendations of the SCOPE. That was the driving force.

See Appendixes M for the rest of the interview comments on the influences within the legislative system on HB 72.

The questionnaire addressed these internal influences by asking legislators to respond to the question, "How would you assess the influence of the following on the formulation of your views as you voted during the special session of 1984?" This question was followed by a list of seven specific influences developed from the interview data within the legislative system and an other category which could be filled in. These are shown in Table 12. Table 12 shows the
degree of influences within the legislative system on HB 72.

This table shows a fairly equal distribution of legislators' opinions on the degree of great or considerable influence that the governor (30% of legislators), lieutenant governor (35% of legislators), and Speaker of the House (41% of legislators) had. It is notable that 50% of the legislators thought the governor had little or no influence on the formulation of their views as they voted on HB 72. In general, the Senate Education Committee (55% of legislators), legislative committees other than Education (71% of legislators), and legislator's staff (50% of legislators) were perceived as having little or no influence. The other category had numerous responses, but no common trend was identifiable. There was no identifiable trend of certain state environmental conditions being significantly more or less influential on the enactment of HB 72.

When responses were broken out by area of residency, (see Appendix K), it was found that 75% of rural legislators said the governor had little or no influence on their views, while only 42% of suburban and 39% of urban legislators said the governor had little or no influence. Sixty-one percent of the legislators from rural areas said the lieutenant governor had little or no influence, while only 31% of the urban legislators said he had little or no influence. Forty-four percent of urban and 34% of suburban legislators perceived him as having great or considerable influence while
32% said he had great or considerable influence. The Speaker of the House was perceived by 56% of suburban and 43% of urban legislators as having great or considerable influence, while only 29% of rural legislators said he had great or considerable influence with 57% saying he had little or no influence.

Influences Outside the Legislative System: Table 13

Interview discussions about the outside influences on HB 72, along with a review of the literature, resulted in 17 variables being identified as possible influences on legislators as they voted on HB 72. They were (a) Ross Perot, (b) Lobbyists for Ross Perot, (c) Select Committee on Public Education members, (d) Comptroller, (e) Texas Council of Urban Schools, (f) Equity Center, (g) Texas Education Agency, (h) State Board of Education, (i) Constituents, (j) Chambers of Commerce, (k) Educators back home, (l) Media, (m) Lobbyists of business interests, (n) Public interest groups, (o) Teachers' education groups, (p) Administrative/school board education groups, (q) Mexican American Legal Defense and Educational Fund school finance lawsuit.

Ross Perot was mentioned by all interviewees as influencing the process of HB 72. Typical comments were:

Interviewee 8:

It took somebody that had enough vision and the courage to sell the legislature on passing it. It was a bitter pill for a lot of people. That was the first time that
had ever happened to them. The only reason the business community accepted it was because they had someone of the status of Perot that could communicate it and sell it to them. The business community had always looked upon education kinda like brotherhood and apple pie. Let the educators take care of it.

Interviewee 9:

Perot had the charisma and the know-how to do the organizing of a quick project with lots of experts and lots of money and lots of special help.

Another variable mentioned frequently by legislators (at least 11 of the 19) was teacher education groups such as Texas State Teachers Association, Texas Federation of Teachers, Association of Texas Professional Educators, Texas Classroom Teachers Association, etc. The interviewees were mostly in agreement that these organized groups were not influential on the HB 72 legislative process. However, there were some that felt these groups did have some influence. Interviewee 6 said, "TSTA is strong enough to have some influence over any type of legislation." Interviewee 10, on the other hand, stated:

Within the traditional educational establishment, your interest groups, your major players, teacher organizations, didn't have that much influence in this process. To much extent they were locked out of the process. That was an unusual phenomenon in itself.
They were perceived as not being supportive. And there was very much either you're on the team or you're off the team mindset. "Are you a friend of this movement, or are you an opponent?" came from the Speaker and the lieutenant governor.

Interviewee 11 said:

Teachers' groups showed almost zero leadership. They were lost. Leadership is when you have the courage to disagree with your membership when they are uninformed. None of them had the courage for a moment to disagree with their membership. One exception was TFT. Legislative leadership listened to the superintendents.

The organized teacher groups were perceived by interviewees to be separate from local educators as indicated by Interviewee 16:

Education community did not lose credibility as far as influencing policy. Credibility problem was with the public and legislators were in the middle. Legislators rely on their school boards, administration, and teachers or whomever is in the establishment that we all know.

Interviewee 9 said, "I think the educational community essentially got run over by outside forces." A very interesting comment from Interviewee 5 was:

I think the greatest tragedy of it all is all the talk you hear about educators were excluded, and all that is
just nonsense. The truth of the matter was they were begged from the start to come forward, but the groups had an inability to do that. They're always scared they're going to offend one member over another. And as a consequence, they opted out of the process.

Other outside influences discussed by interviewees were those most often related to the need to address equalization. Interviewee 8 referred to these variables when he said:

I have praise for Mr. Bullock (comptroller) for taking the initiative for developing a data base of his own to develop a system in support of the Urban Council, the Equity Center, and SCOPE with additional information that helped to validate all the information that was used in HB 72. Bullock is the unsung hero.

See Appendix N for the rest of the interview comments on the outside influences on HB 72.

The questionnaire addressed outside influences by asking legislators to respond to the question, "How would you assess the influence of the following on the formulation of your views as you voted during the special session of 1984?" This question was followed by a list of 17 specific influences outside the legislative system and an other category which could be filled in. These are shown in Table 13.

Constituents (68% of legislators) and educators back home (55% of legislators) were perceived as having the
<table>
<thead>
<tr>
<th>Influences</th>
<th>Responses</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Boss Perot (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>27</td>
<td>16</td>
<td>16</td>
<td>13</td>
<td>14</td>
<td>1</td>
</tr>
<tr>
<td>2. Lobbyists for Perot (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>27.4</td>
<td>16.2</td>
<td>16.2</td>
<td>13.1</td>
<td>14.1</td>
<td>1.0</td>
</tr>
<tr>
<td>3. Select Committee on Public Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>25.3</td>
<td>23.2</td>
<td>16.2</td>
<td>16.2</td>
<td>14.1</td>
<td>1.0</td>
</tr>
<tr>
<td>4. Comptroller (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>8.1</td>
<td>16.2</td>
<td>15.4</td>
<td>24.2</td>
<td>12.1</td>
<td>1.0</td>
</tr>
<tr>
<td>5. Texas Council Urban Schools (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>2.0</td>
<td>12.1</td>
<td>13.1</td>
<td>14.3</td>
<td>20.3</td>
<td>1.0</td>
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<td>6. Equity Center (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>4.0</td>
<td>17.1</td>
<td>11.1</td>
<td>10.2</td>
<td>14.4</td>
<td>7.1</td>
</tr>
<tr>
<td>7. Texas Education Agency (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>3.0</td>
<td>14.1</td>
<td>20.2</td>
<td>24.4</td>
<td>19.2</td>
<td>3.0</td>
</tr>
<tr>
<td>8. State Board of Education (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>1.0</td>
<td>14.1</td>
<td>21.2</td>
<td>27.2</td>
<td>29.2</td>
<td>3.0</td>
</tr>
<tr>
<td>9. Constituents (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>27.3</td>
<td>40.4</td>
<td>19.2</td>
<td>10.1</td>
<td>3.0</td>
<td>2.0</td>
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<tr>
<td>10. Chambers of Commerce (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>3.0</td>
<td>15.2</td>
<td>27.3</td>
<td>24.3</td>
<td>24.3</td>
<td>4.0</td>
</tr>
<tr>
<td>11. Educators back home (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>(%)</td>
<td>22.2</td>
<td>22.3</td>
<td>20.2</td>
<td>13.1</td>
<td>9.1</td>
<td>1.0</td>
</tr>
<tr>
<td>12. Media (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>4.0</td>
<td>22.2</td>
<td>21.2</td>
<td>24.2</td>
<td>12.2</td>
<td>4.0</td>
</tr>
<tr>
<td>13. Lobbyists (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>4.0</td>
<td>8.2</td>
<td>22.2</td>
<td>24.3</td>
<td>25.3</td>
<td>2.0</td>
</tr>
<tr>
<td>14. Public interest groups (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>8.1</td>
<td>12.1</td>
<td>18.2</td>
<td>19.2</td>
<td>35.4</td>
<td>4.0</td>
</tr>
<tr>
<td>15. Teachers' education groups (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>9.1</td>
<td>29.3</td>
<td>27.3</td>
<td>21.2</td>
<td>16.2</td>
<td>0.0</td>
</tr>
<tr>
<td>16. Admin./school board groups (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>5.1</td>
<td>25.3</td>
<td>30.2</td>
<td>21.2</td>
<td>21.2</td>
<td>1.0</td>
</tr>
<tr>
<td>17. MALDEF lawsuit (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>14.1</td>
<td>12.1</td>
<td>12.1</td>
<td>16.2</td>
<td>35.4</td>
<td>2.0</td>
</tr>
<tr>
<td>18. Other (p)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>2.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>94.9</td>
</tr>
</tbody>
</table>

**Notes:** A = great influence; B = considerable influence; C = moderate influence; D = little influence; E = no influence; F = no opinion; G = no answer.
highest percentage of ratings of great or considerable influence on the formulation of legislators' views as they voted during the special session of 1984. Ross Perot was perceived by 37% of the legislators as having great influence, and 54% perceived him as having great or considerable influence. Lobbyists for Ross Perot (49% of legislators) were perceived as having great or considerable influence. Over 60% of the legislators perceived the comptroller, the Texas Council of Urban Schools (a coalition of the eight largest school districts in Texas: Houston, Dallas, Austin, Ft. Worth, San Antonio, El Paso, Corpus Christi, Ysleta), and the Equity Center (a nonprofit organization whose membership is made up of Texas school districts whose wealth is below the 25th percentile of state taxable wealth) as having little or no influence on their votes. Over 50% of the legislators perceived the Texas Education Agency (state agency charged with the operation of public school districts in Texas), the State Board of Education, MALDEF lawsuit (Mexican American Legal Defense and Educational Fund, Edgewood ISD v. Bynum (1984): lawsuit filed against the state of Texas "to require the state to make permanent changes in the system of financing public schools in the state in order to conform to the state's financing system to the dictates of the state constitution..."), and lobbyists of business interests as having little or no influence on their votes. Over 40%
perceived chambers of commerce and the media as having little or no influence. The Select Committee on Public Education was viewed by 37% of the legislators as having little or no influence on their votes, with 35% indicating it had moderate influence. Teachers' education groups (Texas State Teachers Association, Texas Federation of Teachers, Association of Texas Professional Educators, Texas Classroom Teachers Association) and administrative/school board education groups (Texas Association of School Boards, Texas Association of School Administrators, Texas Association of Secondary School Principals) showed no trend in degrees of influence on legislators. The other category contained a few miscellaneous comments.

Responses broken out by area of residency showed rural legislators were more likely to indicate Ross Perot had little or no influence on their views (56%), while most urban and suburban legislators indicated he had great or considerable influence (58% urban, 68% suburban). A trend was found in the comptroller, the Texas Council of Urban Schools, the Equity Center, and the equalization lawsuit being less influential on the rural legislators and more influential on the suburban and urban legislators (only the equalization lawsuit was equally as non-influential on suburban legislators as rural legislators). Rural legislators were considerably less influenced by the media than were suburban and urban legislators.
Cross-tabulation of area of residency and Ross Perot showed a chi-square of 17.67 with 4 degrees of freedom and a significance at the .001 level. A significant relationship is seen between area of residency and Ross Perot. When looking at the cross-tabulation table (see Appendix K), rural legislators heavily viewed Ross Perot as having little or no influence, while most urban and suburban viewed him as having great or considerable influence. A significant relationship is also seen between area of residency and public interest groups. Cross-tabulation shows a chi-square of 15.38 with 4 degrees of freedom and a significance at the .004 level.

Over 70% of the rural and suburban legislators said public interest groups (Communities Organized for Public Service, Valley InterFaith, largely Catholic and Mexican-American organization of public interest) had little or no influence, while the urban legislators were quite evenly divided as to their opinion of degree of influence of public interest groups. Two other variables that produced chi-squares have not been reported because in both cases 3 of the 9 cells had expected frequencies less than 5.0. These two variables were the Equity Center and the MALDEF school finance lawsuit (Edgewood ISD v. Bynum, 1984).

In comparing responses between influences within the legislative system and outside the legislative system, it appears most influences came from outside the legislative system. A higher percentage of variables outside the
legislative system was rated by legislators as having great or considerable influence than those variables within the legislative system.

When looking at all 39 variables of the questionnaire, a priority ranking by frequency and percentage of great or considerable influence responses can be shown as in Table 14.

Table 14
Great or Considerable Influence Variables from Highest to Lowest Percentage

<table>
<thead>
<tr>
<th>Influences</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Legislators' demand for educational accountability</td>
</tr>
<tr>
<td>2. Constituents</td>
</tr>
<tr>
<td>3. Texas behind most other states in educational achievement</td>
</tr>
<tr>
<td>4. Public's demand for improvement in public education in Texas</td>
</tr>
<tr>
<td>5. National public perception of decline in quality of public education</td>
</tr>
<tr>
<td>6. Educational needs of businesses relocating to Texas</td>
</tr>
<tr>
<td>7. Need to address equalization of school finance in Texas; educators back home</td>
</tr>
<tr>
<td>8. Ross Perot</td>
</tr>
<tr>
<td>9. Lobbyists for Ross Perot</td>
</tr>
<tr>
<td>10. National economic issues</td>
</tr>
</tbody>
</table>

(table continues)
Table 14

**Great or Considerable Influence Variables from Highest to Lowest Percentage**

<table>
<thead>
<tr>
<th>Influences</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Speaker of the House</td>
</tr>
<tr>
<td>12. National reports such as &quot;A Nation at Risk&quot;</td>
</tr>
<tr>
<td>13. Teachers' education groups</td>
</tr>
<tr>
<td>14. Lt. Governor</td>
</tr>
<tr>
<td>15. Texas business and industry concern for economic welfare of state</td>
</tr>
<tr>
<td>16. Administrative/school board education groups</td>
</tr>
<tr>
<td>17. Governor White's inability to fulfill 1982 campaign</td>
</tr>
<tr>
<td>promise of pay raise for teachers because of budget constraints; Governor White</td>
</tr>
<tr>
<td>18. Media; MALDEF school finance lawsuit</td>
</tr>
<tr>
<td>19. House Education Committee; SCOPE; federal fiscal retrenchment; educational reform in other states</td>
</tr>
<tr>
<td>20. Public interest groups; no new state revenue surplus</td>
</tr>
<tr>
<td>due to the stabilization of oil and gas prices</td>
</tr>
<tr>
<td>21. Chambers of Commerce</td>
</tr>
<tr>
<td>22. Equity Center; Senate Education Committee; legislator's staff</td>
</tr>
<tr>
<td>23. Comptroller; Texas Education Agency</td>
</tr>
<tr>
<td>24. State Board of Education</td>
</tr>
</tbody>
</table>

*(table continues)*
Table 14

Great or Considerable Influence Variables from Highest to Lowest Percentage

<table>
<thead>
<tr>
<th>Influences</th>
</tr>
</thead>
<tbody>
<tr>
<td>25. Taxpayers' ability to roll back local ad valorem taxes: Texas Council of Urban Schools</td>
</tr>
<tr>
<td>26. Involvement in educational reform made popular by the Reagan administration</td>
</tr>
<tr>
<td>27. Lobbyists of business interests</td>
</tr>
<tr>
<td>28. Legislative committees other than Education</td>
</tr>
</tbody>
</table>

Influence of Ross Perot: Table 15

Because all interviewees discussed the role Ross Perot played in the passage of HB 72, it was considered important to ask legislators, "Which of the following do you feel were primary in Ross Perot's influence on the enactment of HB 72?" This Question III of the questionnaire was followed by five statements and an other category. They were:

1. Dollars spent by Perot
2. Quality of Perot lobbyists (knowledge of legislative process and legislator needs as to what constituents wanted)
3. Business community's respect for Perot
4. Perot's use of media to "sell" education reform
5. Perot's personal determination and organizational skills
Legislators were to circle all the variables they believed to be of primary importance. Table 15 summarizes the legislators' responses to this question. Ross Perot was the only variable of the 39 on the questionnaire that received a significantly high rating of great influence exclusively. Thirty-seven percent of the legislators perceived him as having had great influence on the enactment of HB 72. Legislators' most common responses to the basis of his influence were identified as follows: his use of media to "sell" educational reform and his personal determination and organizational skills. (Over 60% of legislators circled these.) Interview data also showed that Perot's use of media and his personal commitment to education reform in Texas were primary in his ability to influence the legislative process. Perot's use of media and his personal determination and organizational skills were perceived by over 60% of the legislators as being important in the reasons for Perot's influence. Dollars spent and Perot lobbyists were about equally likely to be considered important or not as to their being part of Perot's influence. The business community's respect for Perot was not perceived by most legislators as a primary factor of Perot's influence. The other category contained miscellaneous comments in which no pattern was found.

Some quotations from the interviews will illustrate the role Ross Perot played.
<table>
<thead>
<tr>
<th>Conditions</th>
<th>Influential</th>
<th>Not Influential</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Dollars spent by Perot (n)</strong></td>
<td>47</td>
<td>52</td>
</tr>
<tr>
<td>(%)</td>
<td>47.5</td>
<td>52.5</td>
</tr>
<tr>
<td><strong>2. Quality of Perot lobbyists (n)</strong></td>
<td>52</td>
<td>47</td>
</tr>
<tr>
<td>(%)</td>
<td>52.5</td>
<td>47.5</td>
</tr>
<tr>
<td><strong>3. Business' respect for Perot (n)</strong></td>
<td>35</td>
<td>64</td>
</tr>
<tr>
<td>(%)</td>
<td>35.4</td>
<td>64.6</td>
</tr>
<tr>
<td><strong>4. Perot's use of media (n)</strong></td>
<td>64</td>
<td>35</td>
</tr>
<tr>
<td>(%)</td>
<td>64.6</td>
<td>35.4</td>
</tr>
<tr>
<td><strong>5. Perot's personal determination (n)</strong></td>
<td>65</td>
<td>34</td>
</tr>
<tr>
<td>(%)</td>
<td>65.7</td>
<td>34.3</td>
</tr>
<tr>
<td><strong>6. Other (n)</strong></td>
<td>10</td>
<td>89</td>
</tr>
<tr>
<td>(%)</td>
<td>10.1</td>
<td>89.9</td>
</tr>
</tbody>
</table>
Interviewee 2:

Perot's basis of influence was his building up of public support for reform. He created a mood of "are you for me or are you against me?" He had chambers of commerce and papers supportive of the reform. They were calling and writing their representatives and senators and saying we want you to support their reform.

Interviewee 3:

Perot proved to be a lightning rod. He made headlines in the paper and it galvanized citizen support, which I think was more important than the lobbying efforts.

Interviewee 5:

Perot had the ability to communicate and command media attention and coverage and through that to communicate to the public.

Interviewee 6:

Perot's bases was that he was so well organized. He knew what he wanted. He knew what his charge was from the Governor. He had the lobbying forces so organized that the legislature, every place they turned, they were looking at someone lobbying for reform.

Interviewee 9:

Perot's critical role was to go beyond the legislative leadership and bring out the national scene, looking at what the reform experts were saying in some of these think tank operations in Atlanta, Denver, and so forth.
Ideas were coming from decision makers outside the educational community to do what they wanted the educators to do. That's the element that Perot brought in which I think was with the agreement of Lt. Governor Hobby and Speaker Lewis and perhaps Governor White.

Interviewee 13:

It really wasn't so much what he did while the committee was meeting and reaching its recommendations and so forth but it was the selling job afterwards. They did an extraordinary job. I have never seen anybody that is Perot's equal in dramatizing an issue. The basis of Perot's influence was his ability to capsule and dramatize an issue. On any complex issue like this, obviously information is very powerful.

Interviewee 15:

None of HB 72 would have come to fruition if it were not for Perot. He used his energy, personal resources, manipulation of the news media, and the processes of government.

See Appendix 0 for more interview data on Ross Perot.

Sources of information influencing votes on HB 72: Table 16

Based on the interview data and a review of the literature, the following sources of information utilized by legislators were identified: (a) SCOPE, (b) lobbyist's efforts, (c) expertise of other legislators, (d) education groups, (e) legislative leadership.
Table 16
Frequency and Percentage Distributions for Sources of Information Influencing Votes on HB 72

<table>
<thead>
<tr>
<th>Conditions</th>
<th>Influential</th>
<th>Not Influential</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Select Committee on Public Education (SCOPE) recommendations (n)</td>
<td>54</td>
<td>45</td>
</tr>
<tr>
<td></td>
<td>54.5</td>
<td>45.5</td>
</tr>
<tr>
<td>2. Lobbyist's efforts (n)</td>
<td>33</td>
<td>66</td>
</tr>
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Interviewee comments referring to sources of information were:

Interviewee 1:

For the first time the legislative leadership had an alternative source of information for school finance to the education agency and the education establishment.
(That was the comptroller.)

Interviewee 17:

Educators were left out of the process because there was no good information there. It was an attempt on everybody's part to take care of themselves.

Interviewee 8:

Texas Education Agency had provided information in the past and should provide it. They have all the information and the records and should be the leading influence in providing any system for the state.

Interviewee 5:

I would say that every item that was ultimately put in HB 72 really came from those fact-finding missions. "No pass no play" didn't get invented in Perot's mind. Teachers and principals in the droves came in and said "You've got to do something to help us control special, extracurricular activities. We can't control it."
These ideas came from individual educators. Not from any special interest group in Austin.
Interviewee 15:

Bullock generated volumes of work papers on education. He determined the financial figures. He had just tons of information, and people trusted his information. So people turned to him, ignoring the Texas Education Agency. Whenever TEA put out information, the legislators tended to disregard it. That was a strange phenomenon. I've never seen anything like that. Before then and not since. The agency responsible for government running a program actually was viewed by the legislature as working against their own program.

Interviewee 10:

I saw the lobbyists' role as being very much in the center of things and using their skills to persuade the members that certain things needed to be done and were very clear about what their agenda was.

Question IV of the questionnaire asked legislators, "From what sources did you obtain the information that influenced your vote on HB 72?" They were asked to indicate any of the five specific variables that were important sources of information to them. Table 16 summarizes the legislators' responses to this question. Legislators were divided as to which sources were influential on their votes on HB 72. Lobbyists' efforts as well as the expertise of other legislators were perceived by over 60% of the legislators as not having influence on their votes. The
other category showed a frequent listing of local educators as being sources of information that influenced votes.

Findings of Factor Analysis

In an attempt to reduce the volume of data and to clarify the results, a factor analysis was done on the 39 variables listed in Sections I and II of the questionnaire. Due to the small number of responses, the write-ins under other were excluded. The analysis was conducted using the Statistical Package for the Social Sciences (SPSS) factor analysis program. The method used was principal factoring with iterations. The criterion used to determine the number of factors was the commonly used eigenvalue equal to one. The $R^2$ for the correlation matrix was used as the initial commonality estimate. An oblique factor pattern rotation was used.

The procedure required four and five iterations to converge. At least three factors were identified by the program and were found to be consistently interpretable under several rotations. The three factors were identified as (a) school finance equalization, (b) local influence, (c) economic issues. All variables included in each factor and the eigenvalues are given in Appendix P.

The three variables which appear to be measuring some common factor clustered under Factor 1 are (a) the lieutenant governor, (b) the Equity Center (organization of poor school districts), and (c) public interest groups such as Citizens
Organized for Public Support (COPS) and Valley Interfaith. The lieutenant governor had always been interested in addressing the issue of funding disparities among the 1,063 independent school districts in Texas. Interviewee 8 made this clear:

Hobby really fought for the equity issue even to the point that he was the only one standing for that position because the Speaker was ready to negotiate for a lesser program. It's always been Hobby's goal to bring about an equitable approach to equity in education.

The Equity Center, COPS, and Valley Interfaith were interested in a change in state funding formulas that would make educational opportunities for children from property-poor districts as equal as for children of property-rich districts. Interviewee 13 described the uniqueness of this situation:

There was one kind of eureka kind of development where you had a coming together for the first time of groups like COPS in San Antonio, Valley Interfaith, and a few others, with chambers of commerce. There were political alliances that I had never seen before.

A majority of the interviewees and legislators indicated that the need to address the equalization issue was an important state condition that led to the enactment of House Bill 72.
Factor 2 items most highly related were constituents and educators back home with Ross Perot showing a negative relationship to constituents and educators back home. As certain legislators indicated, constituents and educators back home had influence on their votes on HB 72. These same legislators were likely to indicate that Ross Perot had less influence on their votes. The converse is also true.

Factor 3 items showing a high degree of a common element were national economic issues such as loss of U.S. industrial strength and a decline in U.S. productivity, educational needs of business relocating to Texas, and Texas business concern for the economic welfare of the state. The ability of Ross Perot to convince the business community of Texas that educational reform was critical to Texas being able to compete with other states, and on an international basis, was very important to the passage of HB 72. Constituents representing the businesses of their legislator's districts supported the concept of educational reform as a sound economic philosophy of Texas.

Summary

Interview data and questionnaire responses resulted in the collection of information pertaining to the conditions, groups, and individuals that influenced the enactment of HB 72 during the 1984 special session of the 68th Texas legislature. This information was presented as percentage and response frequencies and interview data. In addition,
cross-tabulations and chi-square calculations were used to determine significant relationships of the urban, suburban, and rural legislators to the questionnaire items. A factor analysis was performed on the 39 variables of the questions with at least three factors found to be interpretable.
SUMMARY, FINDINGS, CONCLUSION, AND RECOMMENDATIONS

Chapter 5 contains a summary of the study and a presentation, discussion, and analysis of the major findings. Also included are limitations of the study and recommendations.

Summary of the Study

The purpose of the study was to examine the fundamental question of what influenced the passage of House Bill 72 by the 68th Texas legislature. Research questions asked were, "What were the national and state environmental conditions that influenced this educational reform?" and "Which groups and individuals were influential, and what was the basis of their influence?"

In order to focus on the interrelationships among political actors and institutions within the Texas legislature's special session of 1984, a systems approach was used in conducting the study. As described in the literature review, a political system is composed of multiple social interactions among groups involved in the policy-making process. The political system is distinct from the greater social system in which it exists as a subsystem but is
subject to its influences and environmental conditions.
Regarding the special 1984 session of the Texas legislature as a discrete political system revealed specific influential actors and environmental conditions.

The Sample and Data Collection.

The population for this study consisted of all members of the 1983-84 Texas legislature, i.e., the Senate and the House of Representatives. Some were personally interviewed, and all were asked to respond to a survey questionnaire.

Interviews were conducted in August 1986 with 19 key individuals involved in the 1984 special session (see Appendix A). All interviews were personal visits, with the exception of one which was a telephone interview. The interviews were tape recorded and transcribed. Most of the interviews were conducted during August 1986 while the 69th Texas legislature was in special session.

Data from these interviews were used to develop a questionnaire. Thirty-nine variables which emerged from the interviews as being the most important factors in influencing the legislative process for HB 72 were listed on the questionnaire. Respondents were asked their opinion of whether each variable was of great, considerable, moderate, little or no influence. Respondents were also asked for demographic information. The questionnaire was delivered to legislators during September 1986 with a second mailing sent to nonrespondents in October.
The 99 respondents to the questionnaire represented 54% of the total legislature and accurately reflected its demographics. Details regarding the questionnaire respondents are shown in Tables 1 through 8 in chapter 4.

The data from the personal interviews were further used to elucidate the findings of the research, particularly the questions of why factors or individuals were influential on the legislative process.

Data Analysis.

Statistical analysis was performed on the data gathered from legislators' responses to the questionnaire. Demographic data regarding the respondents as well as the total legislature were compiled and shown in Tables 1 through 8 in chapter 4. The degree of influence of a total of 39 variables listed on the questionnaire was also analyzed in terms of frequency and percentage. These analyses are shown in Tables 9 through 16 in chapter 4.

In addition, correlation coefficients were calculated, and a factor analysis was performed on the 39 variables. Three major factors emerged from that analysis: school finance equalization, local influence, and economic issues. Details regarding the factor analysis are shown in Appendix P.

Principal Findings

Of all the 39 variables of the questionnaire, those most often rated by legislators as having great or considerable
influence were, in priority order, (a) Texas legislators' demand for educational accountability, (b) constituents, (c) Texas being behind most other states in educational achievement. These three major influences on the enactment of HB 72 are state influences, indicating that major educational reform in Texas was influenced more by variables within the state political system than by national conditions or influences.

The national environmental conditions found to be most influential on the enactment of HB 72 were, in priority order, (a) national public perception of decline in quality of public education, (b) national economic issues such as international competition and loss of U.S. industrial strength, (c) national reports such as "A Nation at Risk." As already stated, national environmental conditions were rated as less influential than state conditions. Interviewee 11 pointed this out,

National economy had influence only indirectly. It motivates a few people but only the very sophisticated who truly understand the relationship of education to international competition.

However, it is fair to assume that the subjective nature of the national conditions was translated into similar perceptions at the state level to become the most influential conditions.

The state environmental conditions most influential on the enactment of HB 72 were, in priority order, (a) Texas
legislators' demand for educational accountability, (b) Texas being behind most other states in educational achievement, (c) the public's demand for improvement in public education in Texas. These concerns were enunciated by Interviewee 12, Our education system was not providing the kind of educational opportunities that were required for years to come. Our economy has changed from a hard product economy to a service one. To compete in that type of environment requires a better educated work force. Texas young people will no longer just compete with other Texas high school graduates but will have to compete with graduates from all over the United States and the world.

Two other very important state environmental conditions emerged as well. A majority of legislators viewed the educational needs of businesses relocating to Texas and the need to address equalization of school finance in Texas as having great or considerable influence on the enactment of HB 72.

Initial interviews with key individuals addressed these concerns. Interviewee 18 said,

[Concerning] relocation of business, [corporations] said good educational opportunities for their employees and their families was the number one thing.

Also, from Interviewee 12,

It had been recognized that Texas did not have a truly equitable system of distributing state funds for public
school finance. It was pretty obvious that if we didn't bring a high level of equity to that distribution, we might well find ourselves in federal court. The system we used simply did not recognize the difference in the cost of education in urban versus rural districts.

It is worth noting that there was a significant relationship between legislators' residence and two influential factors. Over 60% of the urban and suburban respondents perceived the need to address equalization of school finance as having great or considerable influence, but 32% of the rural legislators perceived it as having little or no influence. Also, a 75% majority of rural respondents said legislators' demand for educational accountability had little or no influence on their votes.

Within the legislative system, the influences perceived by legislators as most important were, in priority order (a) Speaker of the House, (b) lieutenant governor, and (c) governor. According to Interviewee 11,

When the presiding officers of the legislature want something, they are tremendously influential. That's inherent in the position, through their power to appoint, power to decide on committees, power to retire bills.

Again, there was significance in the correlation between legislators' residence and their responses to this area of questioning. Seventy-five percent of the rural legislators
said the governor had little or no influence on their views as they voted on HB 72. Less than 50% of the urban and suburban legislators said the governor had no influence. A similar trend indicated the lieutenant governor and the Speaker of the House were viewed as having less influence on rural than on urban and suburban legislators.

Influences outside the legislative system were also analyzed. Those perceived by legislators as most important were, in priority order, (a) constituents, (b) educators back home, (c) Ross Perot. Constituents were also the second most important variable overall. Although strictly speaking they are outside the realm of the legislative system, constituents are definitely a part of the state-related influential factors. Educators back home can also be considered as part of the constituency base and as a state-related factor.

Interviewee 6 summed up the external influences, Influence on chambers of commerce was local educators, the issues, and Perot. All chambers are involved in public education. If the local superintendents were behind education reform, then the education committees of the chambers would come forth with pressure on the boards of chambers with "Let's get involved, let's have reform."

The one outstanding influential factor which was outside the normal legislative system was Ross Perot. Additional information from the questionnaire indicated that the most
important reasons for Perot's influence were his personal
determination and organizational skills and his use of the
media to sell education reform.

Interviewee 15 summarized Perot's influence,
None of HB 72 would have come to fruition if it were not
for Perot, whose energy and personal resources enabled
his manipulation of the news media and the processes of
government.

It is interesting to note that once again there was a
significant relationship between legislators' residence and
the issues of Ross Perot's and public interest groups'
influence. Rural legislators were more likely to indicate
that Ross Perot had little or no influence on their views
(56%) while most urban (58%) and suburban (68%) respondents
indicated his influence was great or considerable. Also,
over 70% of the rural and suburban respondents said public
interest groups had little or no influence in their votes.

This study also looked for a source of information that
legislators used most often. No clear source was identified,
nor did most legislators perceive lobbyists' information or
the expertise of other legislators as being influential for
their votes on HB 72.

Although the original interview data identified numerous
variables as involved in the enactment of HB 72, statistical
analysis indicated that only a few were of significant
influence on legislators' votes. See page 105 in chapter 4 for a complete ranking of all variables.

Limitations.

1. The interviews and questionnaire were a measure of perceptions, not facts.

2. Questionnaire items could have been more clearly defined in some cases. For example, education groups were shown as one variable.

3. The equalization issue could have been more clearly defined in relation to the *Edgewood v. Bynum* (1984) equalization lawsuit.

4. References to groups such as the Council of Urban School Districts and the Equity Center could have been combined to assess their influence as a coalition.

5. Legislators could have been asked about party influence on their votes.

6. Legislators could have been asked about their perception of this educational reform being a conservative or liberal issue.

7. Who was meant by "educators back home" could have been clarified.

8. The governor, lieutenant governor and Speaker of the House could have been one variable labeled as legislative leadership.
Discussion and Analysis

The political systems approach to an analysis of the Texas legislature during the special session of 1984 shows the interrelationships among the political actors, institutions, and environmental pressures. This descriptive approach explains that there were a number of individuals, institutions, and forces that brought about the enactment of HB 72.

The first was the legislature itself, subject to pressures from within the legislature system. This was evidenced by the priority placed on the issue by the governor, lieutenant governor and Speaker of the House. As expressed by Interviewee 10,

There were probably a few members who yielded to the power of the chair, either the speaker or the lieutenant governor. There is no question that there was a lot of influence exerted from those offices for people to get with the program.

Legislators, along with their constituents, are also subject to perceptions concerning the decline in the quality of education and its ramifications on both a state and national level. What raised their level of concern? Interview and survey data pointed to state and national information available to the public at large, as well as specific information provided to them within the legislative process. The legislators were also influenced by their
constituents' opinions, including pressure from educators back home.

Interviewee 11 alluded to this process,

Influence on the legislators was not strongly coming from the constituents. Then they started hearing about reform and they started agreeing with it...I think 90% of our citizens get their information from television, in capsule form. And we get back input in capsule form like, "I don't want to pay a sorry teacher the same thing I pay a good one. I want there to be a difference." We keep hearing that and ... we can attach our plan to public sentiment.

All of this contributed to a much higher level of awareness and understanding of the problem.

But what brought about this heightening of awareness and concern in 1984 among legislators and their constituents? A very important factor was the influence of H. Ross Perot. Perot worked as a catalyst in the process activating normal processes of information flow and influence brokering.

As a member of the governor's Select Committee on Public Education, Perot was involved in information gathering at the local level. Meeting with local educators and parents, Perot and the rest of the committee uncovered basic requirements for reform. According to Interviewee 5,

Perot spent the fall of 1983 on fact-finding missions with hearings all over the state. (He) interviewed
For three weeks, he invited individual teachers in groups to sit in a conference room with him and talk. He would say, "What do you think are the problems in education today? What do you think would help?"

Interviewee 5 remarked on this process,

I would say that every item that was ultimately put in HB 72 really came from those fact-finding missions. "No pass no play" didn't get invented in Perot's mind. Teachers and principals in droves came in and said, "You've got to do something to help us control special extracurricular activities. We can't control it."

These ideas came from individual educators, not from any special interest group in Austin.

At the same time, the process of information gathering served to raise the awareness and activity level of the constituency base in Texas. This awareness increase resulted later in pressure from the constituency on the legislators.

Perot's grass-roots effort also enlisted the support of the business community which played a big part in pressuring the legislature. Interviewee 8 commented,

The economic elite of Texas had the greatest influence in passing (HB 72). They see education as an economic problem. The illiteracy rate in this country is increasing by 2 to 2 1/2 million a year because of public education and not addressing the needs of the
minorities or the poverty areas of our country. And unless that changes, by the end of this century, we won't have any skilled workers or middle class in this country. Somebody has to check that. That's what Perot kept telling the business elite. He said this is a serious problem for the future of this state and this country. If Texas is going to continue being 47th in literacy rate in this country, there is no way we can ever expect to survive as a state.

Perot also served as a primary source of information during the special session of the legislature. His lobbying organization obtained and provided data which was instrumental in bringing normal political pressure to bear on the legislators. As phrased by Interviewee 10,

There was a great deal of persuasion and counterpersuasion going on. Perot's lobbyists understood the member's needs and what their constituencies were wanting... I saw the lobbyists' role as being very much in the center of things and using their skills to persuade the members that certain things were needed to be done and were very clear about what their agenda was.

Part of Perot's power base was his close affiliation with the governor, lieutenant governor, and Speaker of the House. These individuals working together were a major factor in the enactment of HB 72. Subject themselves to
similar political pressures as the rest of the legislature, the three top legislators were able to make HB 72 a priority issue to the extent that a special session of the legislature was held to address it. Interviewee 15 commented,

If you've got the governor, lieutenant governor, and Speaker absolutely hitched to a program, they can move mountains in a hurry. Happens very seldom. Almost never seen it.

Conclusion

The general stage setting underlying House Bill 72 was by no means unique or without precedent. There had been previous attempts at educational reform in Texas with other special committees on public education appointed by past governors. Interviewees pointed this out as follow,

Interviewee 2:
Several parts of HB 72 were written and filed several years prior to the special session but couldn't even get a hearing in some cases. Bills that had the same content as parts of HB 72 got nowhere in previous sessions.

Interviewee 3:
There have been five or six special committees on public education in Texas during the last 30 years. Other governors had them. Well thought out reports came out of these committees. They are now gathering dust in the basement of the Capitol. But Perot felt there would be change this time and got us excited about it.
The results of this study indicate that the influences on the demand of legislators and their constituents for educational accountability and improvement created history in educational reform in Texas in 1984. The combination of top legislators' focus on the problem of educational inadequacies, Ross Perot's catalytic activities and heightened awareness and pressure within the constituency base all worked together to cause the 68th session of the Texas legislature to pass the most sweeping educational reform law in the history of the state of Texas and the $4.6 billion tax increase that went with it.

Recommendations

On the basis of the findings and analysis of this study, the following recommendations are presented.

1. Educational legislation enacted by the Texas legislature should be analyzed from the perspective of program impact on school districts as well as from a political perspective. As educators, taxpayers, and state legislators gain a clearer understanding of how a political system such as the Texas legislature functions with regard to educational policy, they will be better able to impact the process. As a result, legislators will be able to make sound decisions about the future of public education in Texas.

2. Future legislation passed by the Texas legislature which changes any part of House Bill 72 should be carefully studied. The influences on such legislation along with any
future legislation should serve to give the educational community and legislators important insight into the process of educational policy making in Texas.

3. The Texas legislature should create a public educational research entity to gather data on a continual basis. The resulting research would be an important, non-political source of information to be used by the legislature as it enacts educational legislation.
Appendix A

Interview Subjects

Alan Barnes, Research Associate, Texas Research League
Jim Butler, Executive Director, Texas State Teachers Association
David Cain, State Representative, Chairman, House Transportation Committee
John Cole, Executive Director, Texas Federation of Teachers
Robby Collins, Lobbyist, Dallas Independent School District
Dr. Emmet Conrad, member, State Board of Education
Bill Haley, State Representative, Chairman, House Education Committee
Bill Hammond, State Representative, House Education Committee
Lt. Governor Bill Hobby
Lee Jackson, State Representative, Chairman, House Business and Commerce Committee
Senator Grant Jones, Chairman, Senate Finance Committee
Tom Luce, Lobbyist for Ross Perot
Senator Carl Parker, Chairman, Senate Education Committee
Melinda Terry, Administrative Assistant to Speaker of the Texas House of Representatives
David Thompson, Texas Education Agency, Legal Council
Johnny Vaselka, Executive Director, Texas Association of School Administrators

Bob Weatherford, Director of Governmental Affairs, The Dallas Chamber

Linus Wright, Superintendent, Dallas Independent School District

Larry Yawn, Educational Aide to Governor Mark White
INTRODUCTION: I really appreciate your time for this. As you may know, I am an administrator with the Dallas Independent School District and am in the research phase of writing a dissertation in Education Administration and Political Science at North Texas State University.

PURPOSE: The purpose of this study is to determine the influences brought to bear on Texas legislators that led to the enactment of HB 72.

WHY RESPONDENT: You were chosen to be interviewed because of your involvement with HB 72.

ANONYMITY: I would like to record the interview so that the information will be accurate, if you have no objections? Please feel free to be completely frank with me. Everything you tell me will be used for research purposes only. Your name will not be used.
I know you have 30 minutes on your schedule for me today, and I have about six to eight questions I would like to ask.

1. In attempting to reconstruct the events leading up to and during the special session of 1984, please recollect as best as possible the kinds of things that occurred. What are some of the things that took place that you think caused reform legislation to come about in Texas?

2. Any time there is major educational reform passed by a state legislature there has probably been changes in conditions such as the economy (national and state), political changes, court decisions, voter views, party leaders, interest groups, etc. In your opinion, what were the primary changes in conditions, in the nation and Texas prior to the 1984 special session that led to the development of HB 72?

3. As I know you are well aware, during the weeks prior to and during the special session, legislators were subject to considerable lobbying efforts from individuals and groups, both in and outside of the state legislature. Within the legislature there were colleagues, committee chairmen, legislative leaders, etc. What were the primary forces and who were the major actors within the legislative system that influence legislators during this time?

4. Outside the legislature, there were agency personnel, interest groups within the education community,
lobbyists, constituents, etc. What were the primary forces and who were the major actors outside the legislative system that influenced legislators during this time?

5. Who would you name as three of the most significant actors (individuals or groups) that influenced the passage of HB 72? (may not be necessary if answered in questions 3 and 4)

6. Now that you have named individuals and groups that influenced the passage of HB 72, what do you feel is the basis of their influence?

7. In preparing for these interviews, I've done a lot of reading, and it appears to me that without the changes in environmental factors which we have been discussing, that HB 72 probably would not have come about. What would be your response to this idea?

Would you like a summary of the study?
Appendix C

Panel Members for Questionnaire Validation

Dr. Betty Myers
Professor of Education
Texas Woman's University
2911 Croydon
Denton, TX 76201

Dr. Alan E. Barnes
Research Associate
Texas Research League
1117 Red River Street
Austin, TX 78701

Mr. Robert Weatherford, Vice President
Public Affairs
Dallas Chamber of Commerce
1507 Pacific Avenue
Dallas, TX 75201

Ms. Kay Bailey Hutchison
Attorney at Law
Jenkins, Hutchison and Gilchrist
1700 Pacific Avenue
Dallas, TX 75201-4622
Appendix D

Letter to Panel Members for Validation of Questionnaire

Dr. Alan Barnes, Research Associate
Texas Research League
1117 Rad River Street
Austin, Texas 78701

Dear Alan:

Thank you for assisting in my research efforts by agreeing to help validate my questionnaire. As you are aware, the purpose of this questionnaire to all members of the 68th Texas Legislature is to identify the forces and actors and their perceived degree of influence on the enactment of House Bill 72. This major educational reform is critical to all Texans, and it seems appropriate to study the influences on this historical process.

The validation of this questionnaire is essential to assure that the instrument is consistent and measures what it purports to measure. Approximately fifteen interviews of persons closely involved in this legislative process were conducted prior to the development of this questionnaire. The questionnaire was then derived from these very informative interviews. The interview data will be a major portion of examining and describing the influences.

If you do not have any problems with the questions, Likert scale items, etc., please initial and date your approval of the items. If you do have suggestions, comments, etc., please indicate them or contact me if you need clarification or have questions. Please return the form to me in the enclosed envelope.

My hope is to be able to hand deliver these questionnaires to legislators while they are still in Austin during September, in order to improve my response rate.

Thank you for your prompt attention to this request.

Sincerely,

Martha Jackson
Appendix E

INFLUENCES ON THE ENACTMENT OF HOUSE BILL 72

For each item presented, please put a check (✓) under the category that best represents your opinion.

I. Anytime there is major educational reform passed by a state legislature, there have probably been changes in environmental conditions. How would you assess the influence of the following on the enactment of House Bill 72 in Texas?

**NATIONAL ENVIRONMENTAL CONDITIONS:**

1. National reports such as "A Nation at Risk"
2. National economic issues (international competition, loss of U.S. industrial strength, etc.)
3. Federal fiscal restraint - emphasis on state financial responsibility for public education
4. Educational reform in other states
5. National public perception of decline in quality of public education
6. Involvement in educational reform made popular by the Reagan administration
7. Other (specify)

**STATE ENVIRONMENTAL CONDITIONS:**

1. Legislators' demand for educational accountability
2. Texas behind most other states in educational achievement
3. Educational needs of businesses relocating to Texas
4. Public's demand for improvement in public education in Texas
5. Governor White's inability to fulfill 1982 campaign promise of pay raise for teachers because of budget constraints
6. No new state revenue surplus due to the stabilization of oil and gas prices
7. Texas business and industry concern for economic welfare of the state
8. Need to address equalization of school finance in Texas
9. Taxpayers' ability to roll back local ad valorem taxes
10. Other (specify)

II. How would you assess the influence of the following on the formulation of your views as you voted during the special session of 1984?

**INFLUENCES WITHIN THE LEGISLATIVE SYSTEM:**

1. Governor
2. Lt. Governor
3. Speaker of the House
4. House Education Committee
5. Senate Education Committee
6. Legislative committees other than Education
7. Legislator's staff
8. Other (specify)
### INFLUENCES ON THE ENACTMENT OF HOUSE BILL 72

**Survey - Page 2**

#### INFLUENCES OUTSIDE THE LEGISLATIVE SYSTEM:
1. Ross Perot
2. Lobbyists for Ross Perot
3. Select Committee on Public Education Reform
4. Comptroller
5. Texas Council of Urban Schools
6. Equity Center
7. Texas Education Agency
8. State Board of Education
9. Constituents
10. Chambers of Commerce
11. Educators back home
12. Media
13. Lobbyists of business interests
14. Public Interest groups (COPE, Valley Interfaith, etc.)
15. Teachers' education groups (TSTA, TASA, ATPE, TCTA, etc.)
16. Administrative/school board education groups (TASA, TASA, TASSP, etc.)
17. MALDEF school finance lawsuit (Edgewood v. Sing
18. Other (explain)

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<th>Educators back home</th>
<th>Media</th>
<th>Lobbyists of business interests</th>
<th>Public Interest groups (COPE, Valley Interfaith, etc.)</th>
<th>Teachers' education groups (TSTA, TASA, ATPE, TCTA, etc.)</th>
<th>Administrative/school board education groups (TASA, TASA, TASSP, etc.)</th>
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<td>Considerable</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moderate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Little</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### III. Which of the following do you feel were primary in Ross Perot's influence on the enactment of HB 72? Circle all you feel appropriate.

1. Dollars spent by Perot
2. Quality of Perot lobbyists (knowledge of legislative process and legislator needs as to what constituents wanted)
3. Business community's respect for Perot
4. Perot's use of media to "sell" education reform
5. Perot's personal determination and organizational skills
6. Other (specify)

#### IV. From what sources did you obtain the information that influenced your vote on HB 72? Circle all appropriate items.

1. SCOPE recommendations
2. Lobbyist's efforts
3. Expertise of other legislators
4. Education groups
5. Legislative leadership
6. Other (specify)

#### V. How would you characterize the area where you reside? (check one)

1. Rural
2. Suburban
3. Urban

Please feel free to attach any additional comments concerning the enactment of HB 72. Your response is appreciated. If you would like a copy of the results of this survey, please indicate the name and address of the recipient.

Name __________________________ Address __________________________
Dear SALUTATION:

Texas educational reform has made an impact on the lives of most Texans in some way. The Legislature's key role in shaping educational policy was firmly established as a result of the passage of House Bill 72 during the Summer of 1984.

Presently, I am a Ph.D. candidate in Education Administration at North Texas State University. My dissertation purposes are to identify the environmental conditions as well as the actors who influenced the passage of House Bill 72. This investigation is being conducted with the approval of the Educational Leadership Department of North Texas State University.

The information you provide will be kept strictly CONFIDENTIAL. Each questionnaire is coded with a number. This number will enable me to send an additional mailing to those who do not respond to the first mailing. The number will not be used to identify any individual respondent.

The questionnaire can be completed in LESS THAN TEN MINUTES. Included is a self-addressed, post-paid envelope for you to use to return the questionnaire at your earliest convenience.

The tremendous demands on your time are recognized. Your perspective concerning House Bill 72 is vital to this study.

Your cooperation is sincerely appreciated.

Respectfully yours,

Martha Jackson
Dear SALUTATION:

Per my recent phone call to your office, thank you for agreeing to complete the enclosed, one-page questionnaire being administered to the 68th Texas Legislature. In my initial letter to you in September, I indicated that I am a Ph.D. candidate in Education Administration at North Texas State University. My dissertation purposes are to identify the environmental conditions as well as the actors who influenced the passage of House Bill 72.

The information you provide will be kept strictly CONFIDENTIAL. Each questionnaire is coded with a number. This number will enable me to send an additional mailing to those who do not respond to the second mailing. The number will not be used to identify any individual respondent.

The questionnaire can be completed in less than ten minutes. Included is a self-addressed, post-paid envelope for you to use to return the questionnaire at your earliest convenience.

Your perspective concerning House Bill 72 is vital to this study.

Your cooperation is sincerely appreciated.

Respectfully yours,

Martha Jackson
Appendix H

Interview Data on Party Affiliation and the Conservative versus Liberal Issue

Interviewee 1:
Was not a partisan thing.

Interviewee 2:
Not party issues.
Republicans against HB 72 because of the state board issue. They felt they would loose 'their boys' if the board was appointed with a Democratic governor.
Republicans also against it because of the shifting from local control to state control that the bill called for.

Interviewee 3:
Partisan politics was not particularly involved.

Interviewee 16:
This was not as partisan as a lot of other things.
There's almost nothing these days that there's not some party influence. There is a non-partisan tradition in the Texas legislature.

Interviewee 12:
In Texas we've never organized the legislature along party lines! So your question about party influences is a little bit off.
Interviewee 1:

It was the economic survival of the state. Was not a conservative/liberal issue. It transcended that. Had liberal Democrats thinking the same as the conservatives.

Interviewee 2:

A conservative movement was not the case. Most Republicans were opposed to HB 72 because most Republicans represent suburban areas in the Texas legislature. With the equalization part of it, the suburban districts were going to be receiving less money.

Interviewee 3:

It was not a liberal/conservative issue.
Appendix I

The returned questionnaires were dated upon receipt after the first delivery and mailing. Fifty-four percent of the questionnaires were returned within the first 2 weeks. Thirteen percent were returned within the third and fourth weeks, and 33% were returned as a result of the second mailing, which was 5 weeks after the first mailing.

Frequency and Percentage Distributions for Respondents' Return Rate

<table>
<thead>
<tr>
<th>Return</th>
<th>Responses</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
<td>53</td>
<td>54</td>
</tr>
<tr>
<td>Mid</td>
<td></td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Late</td>
<td></td>
<td>33</td>
<td>33</td>
</tr>
</tbody>
</table>
Appendix J

Crosstabulation of Questionnaire Variables and Area of Residency

National Environmental Conditions

Table J-1

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or</td>
</tr>
<tr>
<td></td>
<td>Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>13</td>
</tr>
<tr>
<td>(%)</td>
<td>50.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>30.3</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>17</td>
</tr>
<tr>
<td>(%)</td>
<td>51.5</td>
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</tbody>
</table>

Note: Chi square = 7.41844 with 4 degrees of freedom;
significance = 0.1154
Table J-2

National Economic Issues

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or</td>
</tr>
<tr>
<td></td>
<td>Considerable</td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural (n)</td>
<td>13</td>
</tr>
<tr>
<td>(%)</td>
<td>50.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>13</td>
</tr>
<tr>
<td>(%)</td>
<td>39.4</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>19</td>
</tr>
<tr>
<td>(%)</td>
<td>57.6</td>
</tr>
</tbody>
</table>

Note: Chi square = 7.15191 with 4 degrees of freedom; significance - 0.1281
<table>
<thead>
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<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
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<td></td>
<td>Greater or Considerable</td>
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<td>Rural (n)</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>14.8</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>29.4</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>31.3</td>
</tr>
</tbody>
</table>

Note: Chi square = 5.50816 with 4 degrees of freedom; significance = 0.2390
Table J-4

Educational Reform in Other States

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
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<tr>
<td>Rural (n)</td>
<td>5</td>
</tr>
<tr>
<td>(% )</td>
<td>18.5</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>11</td>
</tr>
<tr>
<td>(% )</td>
<td>31.4</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>8</td>
</tr>
<tr>
<td>(% )</td>
<td>22.9</td>
</tr>
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</table>

Note: Chi square = 5.49821 with 4 degrees of freedom; significance = 0.2399
### Table J-5

**Public Perception of Decline in Quality Public Education**

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or Considerable</th>
<th>Moderate or No</th>
<th>Little</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td></td>
<td>13</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>46.4</td>
<td>35.7</td>
<td>17.9</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td></td>
<td>21</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>63.6</td>
<td>30.3</td>
<td>6.1</td>
</tr>
<tr>
<td>Urban (n)</td>
<td></td>
<td>26</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>76.5</td>
<td>11.8</td>
<td>11.8</td>
</tr>
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</table>

Note: Chi square = 8.01267 with 4 degrees of freedom; significance = 0.0911
Table J-6

Involvement in Education Reform Made Popular by Reagan Administration

<table>
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<th>Area of Residency</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n) (%)</td>
<td>1 6 21</td>
</tr>
<tr>
<td>Suburban (n) (%)</td>
<td>9 6 19</td>
</tr>
<tr>
<td>Urban (n) (%)</td>
<td>3 9 21</td>
</tr>
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</table>

Note: Chi square = 8.25023 with 4 degrees of freedom; significance = 0.0828
### Table J-7

**Legislators' Demand for Educational Accountability**

<table>
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<th>Degree of Influence</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
<td>Moderate</td>
<td>Little or No</td>
<td></td>
</tr>
<tr>
<td>Rural (n)</td>
<td>18</td>
<td>4</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>69.2</td>
<td>15.4</td>
<td>15.4</td>
<td></td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>28</td>
<td>2</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>80.0</td>
<td>5.7</td>
<td>14.3</td>
<td></td>
</tr>
<tr>
<td>Urban (n)</td>
<td>23</td>
<td>4</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>69.7</td>
<td>12.1</td>
<td>18.2</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Chi square = 1.91636 with 4 degrees of freedom; significance = 0.7511
Table J-8

Texas Behind Other States in Educational Achievement

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Greater or Considerable</th>
<th>Moderate or No</th>
</tr>
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<tbody>
<tr>
<td>Rural (n)</td>
<td>15</td>
<td>7</td>
</tr>
<tr>
<td>(%)</td>
<td>55.6</td>
<td>25.9</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>23</td>
<td>8</td>
</tr>
<tr>
<td>(%)</td>
<td>65.7</td>
<td>22.9</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>25</td>
<td>5</td>
</tr>
<tr>
<td>(%)</td>
<td>75.8</td>
<td>15.2</td>
</tr>
</tbody>
</table>

Note: Chi square = 2.92988 with 4 degrees of freedom; significance = 0.5696
### Table J-9

**Educational Needs of Businesses Relocating to Texas**

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
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<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>15</td>
</tr>
<tr>
<td>(%)</td>
<td>55.6</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>20</td>
</tr>
<tr>
<td>(%)</td>
<td>57.1</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>22</td>
</tr>
<tr>
<td>(%)</td>
<td>64.7</td>
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</table>

Note: Chi square = 0.83389 with 4 degrees of freedom; significance = 0.9338
Table J-10

Public's Demand for Improvement in Public Education

<table>
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<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
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<td></td>
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<tr>
<td>(%)</td>
<td>60.7</td>
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<tr>
<td>Suburban (n)</td>
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</tr>
<tr>
<td>(%)</td>
<td>64.7</td>
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<tr>
<td>Urban (n)</td>
<td>23</td>
</tr>
<tr>
<td>(%)</td>
<td>65.7</td>
</tr>
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</table>

Note: Chi square = 0.56236 with 4 degrees of freedom; significance = 0.9672
<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Greater or Considerable</th>
<th>Less or No</th>
<th>Little</th>
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<tr>
<td>Rural (n)</td>
<td>6</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>(%)</td>
<td>25.0</td>
<td>20.8</td>
<td>54.2</td>
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<tr>
<td>Suburban (n)</td>
<td>11</td>
<td>4</td>
<td>19</td>
</tr>
<tr>
<td>(%)</td>
<td>32.4</td>
<td>11.8</td>
<td>55.9</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>13</td>
<td>5</td>
<td>16</td>
</tr>
<tr>
<td>(%)</td>
<td>38.2</td>
<td>14.7</td>
<td>47.1</td>
</tr>
</tbody>
</table>

Note: Chi square = 1.80486 with 4 degrees of freedom; significance = 0.7716
Table J-12

No New State Revenue Due to Stabilization of Oil and Gas Prices

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or Considerable</th>
<th>Little Moderate or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
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<td>3</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>21.7</td>
<td>13.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
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<td>7</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>21.9</td>
<td>21.9</td>
</tr>
<tr>
<td>Urban (n)</td>
<td></td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>24.2</td>
<td>18.2</td>
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</table>

Note: Chi square = 0.83011 with 4 degrees of freedom; significance = 0.9344
Table J-13

**Texas Business Concern for Economic Welfare of State**

<table>
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<th>Degree of Influence</th>
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</thead>
<tbody>
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<td>Greater or Considerable</td>
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</tr>
<tr>
<td>(%)</td>
<td>34.6</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>12</td>
</tr>
<tr>
<td>(%)</td>
<td>36.4</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>12</td>
</tr>
<tr>
<td>(%)</td>
<td>35.3</td>
</tr>
</tbody>
</table>

Note: Chi square = 1.89867 with 4 degrees of freedom; significance = 0.7544
Table J-14

Need to Address Equalization of School Finance

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<tr>
<th>Area of Residency</th>
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</tr>
</thead>
<tbody>
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<td></td>
<td>Greater or</td>
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<td></td>
<td>(%)</td>
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<td>(%)</td>
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<tr>
<td>Urban (n)</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>(%)</td>
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Note: Chi square = 10.14847 with 4 degrees of freedom; significance = 0.0380
Table J-15

Taxpayers Ability to Roll Back Local Ad Valorem Taxes

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<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
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<td>Greater or Considerable</td>
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</tr>
<tr>
<td>(%)</td>
<td>14.3</td>
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<tr>
<td>Suburban (n)</td>
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<tr>
<td>(%)</td>
<td>12.1</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>6</td>
</tr>
<tr>
<td>(%)</td>
<td>18.2</td>
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</table>

Note: Chi square = 2.56257 with 4 degrees of freedom; significance = 0.6335
### Influences Within the Legislative System

Table J-16

**Governor**

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Greater or Considerable</th>
<th>Moderate or No</th>
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</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td>17.9</td>
<td>7.1</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>(%)</td>
<td>42.9</td>
<td>14.3</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>30.3</td>
<td>30.3</td>
</tr>
</tbody>
</table>

Note: Chi square = 12.56347 with 4 degrees of freedom; significance = 0.0136
<table>
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<th>Degree of Influence</th>
</tr>
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<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>32.1</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>12</td>
</tr>
<tr>
<td>(%)</td>
<td>34.3</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>14</td>
</tr>
<tr>
<td>(%)</td>
<td>43.8</td>
</tr>
</tbody>
</table>

Note: Chi square = 7.06207 with 4 degrees of freedom;
Significance = 0.1326
Table J-18

Speaker of the House

<table>
<thead>
<tr>
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<th>Degree of Influence</th>
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</thead>
<tbody>
<tr>
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<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>8</td>
</tr>
<tr>
<td>(%)</td>
<td>28.6</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>19</td>
</tr>
<tr>
<td>(%)</td>
<td>55.9</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>14</td>
</tr>
<tr>
<td>(%)</td>
<td>42.4</td>
</tr>
</tbody>
</table>

Note: Chi square = 7.72878 with 4 degrees of freedom;
significance = 0.1021
Table J-19

**House Education Committee**

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>5</td>
</tr>
<tr>
<td>(%)</td>
<td>17.2</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>28.6</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>28.1</td>
</tr>
</tbody>
</table>

Note: Chi square = 3.31577 with 4 degrees of freedom; significance = 0.5064
<table>
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<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
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<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>14.3</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>5</td>
</tr>
<tr>
<td>(%)</td>
<td>15.6</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>8</td>
</tr>
<tr>
<td>(%)</td>
<td>25.0</td>
</tr>
</tbody>
</table>

Note: Chi square = 2.39443 with 4 degrees of freedom; significance = 0.6636
Table J-21

Legislative Committees Other Than Education

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or Considerable</th>
<th>Moderate or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td></td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>12.5</td>
<td>4.2</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td></td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>8.8</td>
<td>5.9</td>
</tr>
<tr>
<td>Urban (n)</td>
<td></td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>15.6</td>
<td>18.8</td>
</tr>
</tbody>
</table>

Note: Chi square = 5.41898 with 4 degrees of freedom; significance = 0.2469
Table J-22

Legislator's Staff

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>5</td>
</tr>
<tr>
<td>(%)</td>
<td>20.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>3</td>
</tr>
<tr>
<td>(%)</td>
<td>8.8</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>28.1</td>
</tr>
</tbody>
</table>

Note: Chi square = 7.58128 with 4 degrees of freedom; significance = 0.1082
Influences Outside the Legislative System

Table J-23

Ross Perot

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Greater or Considerable</th>
<th>Moderate or No</th>
<th>Little</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td>10</td>
<td>2</td>
<td>16</td>
</tr>
<tr>
<td>(%)</td>
<td>35.7</td>
<td>7.1</td>
<td>57.1</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>24</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>68.6</td>
<td>20.0</td>
<td>11.4</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>19</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>(%)</td>
<td>57.6</td>
<td>21.2</td>
<td>21.2</td>
</tr>
</tbody>
</table>

Note: Chi square = 17.67195 with 4 degrees of freedom; significance = 0.0014
Table J-24

Lobbyists for Ross Perot

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>35.7</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>19</td>
</tr>
<tr>
<td>(%)</td>
<td>54.3</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>19</td>
</tr>
<tr>
<td>(%)</td>
<td>57.6</td>
</tr>
</tbody>
</table>

Note: Chi square = 5.33074 with 4 degrees of freedom; significance = 0.2550
Table J-25

Select Committee on Public Education Members

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>6</td>
</tr>
<tr>
<td>(%)</td>
<td>21.4</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>25.7</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>27.3</td>
</tr>
</tbody>
</table>

Note: Chi square = 1.78105 with 4 degrees of freedom;
significance = 0.7759
Table J-26

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or Considerable</th>
<th>Moderate or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td>3</td>
<td>4</td>
<td>19</td>
</tr>
<tr>
<td>(%)</td>
<td>11.5</td>
<td>15.4</td>
<td>73.1</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>4</td>
<td>5</td>
<td>25</td>
</tr>
<tr>
<td>(%)</td>
<td>11.8</td>
<td>14.7</td>
<td>73.5</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>9</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>(%)</td>
<td>27.3</td>
<td>12.1</td>
<td>60.6</td>
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</table>

Note: Chi square = 3.64701 with 4 degrees of freedom; significance = 0.4559
Table J-27

Texas Council of Urban Schools

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Greater or</td>
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<tr>
<td>Rural (n)</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td>7.7</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>12.1</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>8</td>
</tr>
<tr>
<td>(%)</td>
<td>24.2</td>
</tr>
</tbody>
</table>

Note: Chi square = 7.88912 with 4 degrees of freedom; significance = 0.0957
<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or</th>
<th>Considerable</th>
<th>Moderate</th>
<th>Little or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td>2</td>
<td>2</td>
<td>22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>7.7</td>
<td>7.7</td>
<td>84.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>5</td>
<td>3</td>
<td>23</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>16.1</td>
<td>9.7</td>
<td>74.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Urban (n)</td>
<td>10</td>
<td>6</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td>32.3</td>
<td>19.4</td>
<td>48.4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Chi square = 9.48860 with 4 degrees of freedom.
Table J-29

Texas Education Agency

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or</th>
<th>Considerable</th>
<th>Moderate or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td></td>
<td>5</td>
<td>6</td>
<td>15</td>
</tr>
<tr>
<td>(%)</td>
<td>19.2</td>
<td>23.1</td>
<td>57.7</td>
<td></td>
</tr>
<tr>
<td>Suburban (n)</td>
<td></td>
<td>4</td>
<td>8</td>
<td>22</td>
</tr>
<tr>
<td>(%)</td>
<td>11.8</td>
<td>23.5</td>
<td>64.7</td>
<td></td>
</tr>
<tr>
<td>Urban (n)</td>
<td></td>
<td>7</td>
<td>6</td>
<td>20</td>
</tr>
<tr>
<td>(%)</td>
<td>21.2</td>
<td>18.2</td>
<td>60.6</td>
<td></td>
</tr>
</tbody>
</table>

Note: Chi square = 1.34120 with 4 degrees of freedom; significance = 0.8543
Table J-30

State Board of Education

<table>
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<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or</th>
<th>Considerable</th>
<th>Moderate</th>
<th>or No</th>
<th>( \chi^2 )</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td></td>
<td>6</td>
<td>3</td>
<td>17</td>
<td></td>
<td>4.38312</td>
<td>0.3566</td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>23.1</td>
<td>11.5</td>
<td>65.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Suburban (n)</td>
<td></td>
<td>3</td>
<td>10</td>
<td>21</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>8.8</td>
<td>29.4</td>
<td>61.8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Urban (n)</td>
<td></td>
<td>6</td>
<td>8</td>
<td>18</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(%)</td>
<td></td>
<td>18.8</td>
<td>25.0</td>
<td>56.3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: \( \chi^2 \) square = 4.38312 with 4 degrees of freedom; significance = 0.3566
Table J-31

Constituents

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>20</td>
</tr>
<tr>
<td>(%)</td>
<td>71.4</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>24</td>
</tr>
<tr>
<td>(%)</td>
<td>68.6</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>23</td>
</tr>
<tr>
<td>(%)</td>
<td>71.9</td>
</tr>
</tbody>
</table>

Note: Chi square = 1.50524 with 4 degrees of freedom; significance = 0.8257
### Table J-32

**Chambers of Commerce**

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Greater or Considerable</th>
<th>Little Moderate or No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rural</strong> (n)</td>
<td>5</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>17.9</td>
<td>32.1</td>
</tr>
<tr>
<td><strong>Suburban</strong> (n)</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>11.8</td>
<td>29.4</td>
</tr>
<tr>
<td><strong>Urban</strong> (n)</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>29.0</td>
<td>25.8</td>
</tr>
</tbody>
</table>

Note: Chi square = 3.35720 with 4 degrees of freedom; significance = 0.4999
<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
<th>Greater or Considerable</th>
<th>Little Moderate or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td>18</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>(%)</td>
<td>64.3</td>
<td>10.7</td>
<td>25.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>19</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>(%)</td>
<td>54.3</td>
<td>22.9</td>
<td>22.9</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>17</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>(%)</td>
<td>51.5</td>
<td>27.3</td>
<td>21.2</td>
</tr>
</tbody>
</table>

Note: Chi square = 2.67370 with 4 degrees of freedom; significance = 0.6138
Table J-34

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
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<tbody>
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<td>Greater or Considerable</td>
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<td>Rural (n)</td>
<td>3</td>
</tr>
<tr>
<td>(%)</td>
<td>12.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>25.7</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>14</td>
</tr>
<tr>
<td>(%)</td>
<td>42.4</td>
</tr>
</tbody>
</table>

Note: Chi square = 7.01791 with 4 degrees of freedom; significance = 0.1349
Table J-35

**Lobbyists of Business Interests**

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
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<td>Rural (n)</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td>7.4</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>6</td>
</tr>
<tr>
<td>(%)</td>
<td>17.6</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>12.5</td>
</tr>
</tbody>
</table>

Note: Chi square = 6.61590 with 4 degrees of freedom; significance = 0.1576
Table J-36

Public Interest Groups

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>2</td>
</tr>
<tr>
<td>(%)</td>
<td>8.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>5</td>
</tr>
<tr>
<td>(%)</td>
<td>14.7</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>13</td>
</tr>
<tr>
<td>(%)</td>
<td>39.4</td>
</tr>
</tbody>
</table>

Note: Chi square = 15.38272 with 4 degrees of freedom.
Table J-37

Teachers' Education Groups

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or</td>
</tr>
<tr>
<td>Rural (n)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>33.3</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9</td>
</tr>
<tr>
<td>(%)</td>
<td>26.5</td>
</tr>
<tr>
<td>Urban (n)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>20</td>
</tr>
<tr>
<td>(%)</td>
<td>58.8</td>
</tr>
</tbody>
</table>

Note: Chi square = 8.52338 with 4 degrees of freedom; significance = 0.0742
<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Greater or Considerable</th>
<th>Moderate or No</th>
<th>Little</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (n)</td>
<td>12</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>44.4</td>
<td>18.5</td>
<td>37.0</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>8</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>(%)</td>
<td>23.5</td>
<td>38.2</td>
<td>38.2</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>11</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>(%)</td>
<td>33.3</td>
<td>36.4</td>
<td>30.3</td>
</tr>
</tbody>
</table>

Note: Chi square = 4.48694 with 4 degrees of freedom; significance = .3441.
Table J-39

MALDEF School Finance Lawsuit

<table>
<thead>
<tr>
<th>Area of Residency</th>
<th>Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greater or Considerable</td>
</tr>
<tr>
<td>Rural (n)</td>
<td>7</td>
</tr>
<tr>
<td>(%)</td>
<td>26.9</td>
</tr>
<tr>
<td>Suburban (n)</td>
<td>4</td>
</tr>
<tr>
<td>(%)</td>
<td>11.8</td>
</tr>
<tr>
<td>Urban (n)</td>
<td>15</td>
</tr>
<tr>
<td>(%)</td>
<td>46.9</td>
</tr>
</tbody>
</table>

Note: Chi square = 11.202752 with 4 degrees of freedom.
Appendix K

Interview Data Related to National Environmental Conditions

Interviewee 3:

Basis of the reform was an economic basis.

Interviewee 11:

I don't believe HB 72 was a product of great vision of Texas needs in part with the world economy. National economy had influence only indirectly. It motivates a few people but only the very sophisticated who truly understand the relationship of education to international competition.

Interviewee 13:

There was similar reform in other states like Tennessee, Florida, mainly southeastern states who traditionally lagged behind the rest of the nation in education.

Interviewee 7:

The fact that people were aware of Reagan being opposed to the federal role in education may have made the climate more receptive for Perot's committee.

Interviewee 15:

The new conservatism of Reagonomics had an impact on this only to the extent that the cuts in federal funding had some exacerbation of the situation and the use of the presidency as pulpit for educational reform. I still don't think it would have happened in Texas without the governor's promise and the surplus problem.
We had a wave of reform proposals that hit. A part of that got into national politics. Reagan was trying to devote attention from his rather poor record for providing funding for education, so he had this commission report which was already working, but he guided it to the extent that no other report like that has ever been ballyhooed.

About the time these national reports were coming out, Albert Shanker said one of the greatest blunders a leader can make is to continue playing the game by the old rules after the rules have changed. People are going to say that this reform business is the same reform we've dealt with where we get a little extra money out of it, and then we congratulate ourselves that we hoodwinked the public to put a little more money into our pockets, and then we go on about business. He said I don't think so. This is going to be a different thing. The reform is either going to succeed, or we're going to lose our public schools.

Interviewee 2:

Major change is that education became a hot issue. A Nation at Risk. Suddenly reform became in vogue for politicians to be interested in. That set the public mood for reform. To a large extent I credit Ross Perot with the Texas movement. A heightened awareness of the issue is the major thing that caused reform.
Reagan made it more respectable for Republicans to be involved in education but with HB 72, most Republicans were opposed to it.

Interviewee 1:

National Commission on Excellence report triggered it. Collected all the things that were happening and put it in one cart.

Interviewee 3:

Sudden loss of industrial strength that America had. We began to lose out to the productivity of Western Europe nations and Japanese. In the field of technology and the computer field and shipping industry and auto business. Studies indicated that children of Western Europe and Japan outsored American school children on standardized exams. This was an embarrassment to the country. The Reagan administration came in hostile to education. In an effort to justify cutting back funds, he set up a committee to find out what was wrong with American education. A Nation at Risk report came out.

Interviewee 10:

A major change in the nation was particularly strong in the Southern states (the influence of the Southern Region Education Board). It came to be reflected in Texas and known as the reform movement. A Nation at Risk spun off a tremendous amount of literature in
periodicals, etc. and the general press of education about the condition of education. And it popularized the issue of education reform at a point and time in a way that it had not been many years before and perhaps it's not that strong right now.

Interviewee 11:
There was no one dramatic change. Have been in a decline of quality of public education for a long time. It became more and more apparent to more and more people. The Presidential task force that wrote A Nation at Risk report increased that awareness. Too, when we started having hysteria about Proposition 13 roll back taxes.

Interviewee 13:
In the early 1980s there was a periodic concern for quality of education. These seem to come along about once every 30 years, about once a generation. There was wide spread concern about the quality of education by a number of national reports. A Nation at Risk. There was similar reform in other states like Tennessee, Florida. Mainly the southeastern states who traditionally lagged behind the rest of the nation in education.

Interviewee 14:
Attention that had been placed on education at the national level with various studies, and particularly
with A Nation at Risk, caused the state's leadership to take a very close look at public education and the delivery of programs in school districts across the state.
Appendix L

Interview Data Related to State Environmental Conditions

Interviewee 12:

Our education system was not providing the kind of educational opportunities that was required for years to come. Our economy has changed from a hard product economy to a service one. To compete in that type of environment requires a better educated work force. Texas young people will no longer just compete with other Texas high school graduates but will have to compete with graduates from all over the United States and the world.

Interviewee 9:

Desire on the part of a lot of people concerned with the Texas economy to make sure that they were attracted to economic growth and that education was one big part of that.

Interviewee 18:

Relocation of business - they said good educational opportunities for their employees and their families was number one thing.

Interviewee 1:

There was a change in perceptions of the business community. Economic survival of the state.

Economic interest of the state is involved in using
their traditional economic leverage of support to political campaigns and giving political support. Most of the entire vested interest lobby establishment was in favor of the bill (utilities, oil and gas, chemical lobby, automobile dealers, realtors, etc.)

Interviewee 7:

From the first moment a tax bill was discussed in the fall of 1982, and Hobby was the first person talking about it right after the November election. He said Texas was a low service and low tax state, and in order to have better services, we needed higher taxes. He talked about education and highways. They were the most traditionally visible and could be used to galvanize support.

It was a fait accompli that if there was a tax bill, education would be a part of it. And the governor insured that by saying there would be no tax bill other than an education tax bill. In other words, the legislature wasn't going to postpone education and set up a committee and then pass a separate highway bill and go on about its business. The governor, for reasons of political leverage, was finally the one that determined the two would happen together.

Highways attached to the education package with a tax bill was the best example of political symbiosis that I've ever seen. Different lobbying groups and support
groups were a marriage of convenience. Once the highways (people who support highway funding) people decided to make this push, they pretty well had their statewide lobbying network and their Austin lobbyists. All that was required was for them to have some joint meetings with Perot's lobbyists to talk about strategy. There were some people who voted for HB 72 because of the highway portion of the tax bill. So they became part of the team and helped the Speaker pass the package because they liked the highway part of it so much. It's the legislature's version of a gentleman's agreement or blood oath. They signed on to help pass it, so they'll pass it all.

Interviewee 15:
The theory I heard enunciated by legislators throughout all this time was that we can't give you more money and tell taxpayers we're raising their taxes and get the same thing in education, so we're going to have to have this reform bill. Some of them were rather cynical in that thinking it was a gimmick we were going to use to leverage the tax issue, leverage our votes in the House.

Interviewee 9:
Polls have shown over time that people will support education and raise taxes if they think they're getting their money's worth and if they know it's going to schools.
The Texas Research League and the taxpayer's group supply a lot of data. All the business people who lobby about taxes were involved. Lobby to protect business as it relates to taxes. The issue was not educational reform but what are we going to do about taxes because with education reform, we'll have to raise taxes. They were brought on board by the interaction between themselves and the political leadership and the governor.

Interviewee 16:

The Legislature knew we needed a tax increase. Two of the main reasons for having state government are highways and education. Mobility and public education are the beginning of the Republic. Highways have their own constituencies which needed to be brought to bear to pass the school part. Not sure they could have passed the tax increase without the highway people. When put them together then have an even broader base—a well financed group.

Interviewee 11:

A proposition arose: If somehow we could deliver a better product to the taxpayer then that could serve as justification for increased taxes, increased commitment to education. SCOPE was created to get Lewis and White off the hook. I don't think it was a product of great vision on their
part. They saw that as a good way to diffuse a bunch of hostile teachers and avoid confrontation with a bunch of no-tax advocates.

Interviewee 5:

Highway lobby and Highway Commission were supporting the increase in the gasoline tax and sales tax.

Interviewee 17:

Forces were the need for a tax bill to fund public education and highways in order to relieve general revenue of the terrible strain. That's the major force that brought it all about. It had nothing to do with public education at that point. It had to do with the need to pass a tax bill in order to relieve the general revenue.

Interviewee 19:

Equity and excellence had to be dealt with or there would have been no HB 72.

Interviewee 12:

It had been recognized that Texas did not have a truly equitable system of distributing state funds for public school finance. It was pretty obvious that if we didn't bring a high level of equity to that distribution that we might well find ourselves in federal court. The system we used simply did not recognize the difference in the cost of education in urban versus rural districts.
Interviewee 13:

The old economic index became widely recognizable as inadequate for distributing state aid. We had become very disequalized. About 1973, Rodriguez case out of Edgewood ISD, the appellate court said the situation is terrible, so we just don't want to get into it. Told the Texas Legislature please go back and try it one more time. Legislators were somewhat concerned with equalization in the 70s but were mainly concerned with pumping billions of more dollars every biennium into the system.

Interviewee 16:

Leadership saw it as an economic type of situation. The governor's push to bring Micro Electronics and Computer Consortium to Texas. It became apparent that a good education system was a must for us to prosper in the post-oil year booms. It was necessary for us to diversify the economy.

Interviewee 14:

If all segments of the education community had stayed together against the finance section, it would have been much more difficult for Perot and the state leadership to engineer the kind of support they did.

Interviewee 7:

For those in districts that lost aid, their votes were motivated more by that than anything else for the most
part. Even though they may have approved three fourths of everything that was in it, if they were from suburban districts and they were taking a real loss, they weren't going to vote for it.

As it turned out, the largest single block of legislators who voted for HB 72 were the minority legislators. They, probably more than anyone else, perceived that the benefits of the school finance provisions of the bill were so good to their districts that the philosophical parts of it were maybe less important.

Interviewee 11:

The lawsuit absolutely influenced legislators.

Interviewee 5:

Perot very early recognized that dealing with the concept of equalization was a critical issue. If schools were going to be improved, we had to do something for equalization. He committed early on, much to the anguish of many saying oh my gosh, we can't deal with equalization. It's a political nightmare. Perot said we're going to deal with equalization.

Our position was that equalization had to occur. If it did not occur a court was going to do it, which it screwed up desegregation. We were not going to let them screw up school finance.

Suburban districts didn't believe that. For 10 years
they had fought off equalization, and they thought they could do it again. They miscalculated just like the teachers miscalculated.

The suburban districts made a bad political mistake. They said nothing is going to happen. We can defeat this, and we're going to withdraw from the process and attempt to defeat it.

Interviewee 8:

Perot, after talking to several people throughout the state, took it upon himself to widen the charge that the governor gave him and said if you want salaries for teachers, then we're also going to address the equity questions and try to find a complete resolution.

I have praise for Mr. Bullock for taking initiative for developing a data base of his own to develop a system in support of the Urban Council, the Equity Center, and SCOPE with additional information that helped to validate all the information that was used in HB 72. Bullock is the unsung hero.
Interviewee 5:

For the first time entirely, the House and Senate were focused on education. That's the result of the special session. I don't believe the results would have been the same without the special session. A special session has the ability to focus an entire group on an issue. The major reasons why educational reform ultimately prevailed is that Lewis and Hobby were united in wanting to accomplish this. When the two are working together on something that is a very formidable combination.

Interviewee 12:

Because of the way the constitution is drawn the governor has tremendous apparent responsibility and relatively little authority with which to fulfill that. So most legislative work is directed through the offices of the lieutenant governor and the Speaker. They have vast powers of appointment. And as to what legislation is to be considered. From the legislature's view, the leadership was obviously committed to reform.

Interviewee 1:

For the first time the legislative leadership had an alternative source of information to the education agency and the education establishment.
Interviewee 8:

I think Hobby convinced Perot of its necessity. Plus, every committee chairman, Speaker, Hobby, everybody over time had had trouble with Bynum and that old state board. Among the leadership it was not perceived to be popular.

Interviewee 3:

Hobby and Lewis' support was influenced by being a part of SCOPE and the influence of business elite of Perot. Perot got the attention of the powers that be in industry and business. Perot was very determined to do something. Recognized that our most valuable resource happens to be our young people. Texas Education Agency had provided information in the past and should provide it. They have all the information and the records and should be the leading influence in providing any system for the state. It appeared that Mr. Bynum disagreed with the approach that SCOPE took and did a great deal to keep the provisions of HB 72 from being passed.

Interviewee 2:

Haley locked horns with Perot, and they fought each other tooth and nail. Personal antagonism between the two of them. Haley dismembered the Perot bill. There was a lot of opposition in the rural areas especially.

Interviewee 15:

Lewis took a very active and personal role in this
thing. more than I think I've seen him do on any other thing since I've worked with the legislature. It could not have happened without Lewis. Some of the things that happened are because he fought for and pushed to make them happen.

Interviewee 7:

Once the House was challenged pretty forcefully. That year the governor sent legislative leaders into the districts to effect elections and said this person is holding up my tax bill to pay for teacher salaries and tried to get them defeated. The House got really irate and said we're not going along with your plan. Well, you can't just really say we'll never do anything, so the House came up with the alternative and said let's look at public education.

Let's just say your winning coalition of 80 votes may have been one third based on school finance, one third based on some strong, personal philosophical commitments, and the remaining one third based on the Speaker and the leadership.

Interviewee 9:

Lewis bought into the reform so heavily because he needed a rationale to give to the voters to explain the tax increase.

Perot's experts wrote the bill. House Education Committee didn't write the bill. Haley allowed the
substitution because he was told he would be gone forever if he fought it anymore.

Interviewee 1:
The Speaker has 21 committee chairmen who were the instrument to lobby internally.

Interviewee 2:
Lewis beat a lot of calcitrant members into shape on a lot of the issues. He signed in blood to the reform package before it was presented to the legislature. And then went about passing it. The three sponsors of the Perot bill (Pevito, L. Jackson, and Balanga) set to work with Lewis to pass it.

Hobby and Lewis' basis of influence was more of an inside approach in terms of control over their respective bodies. Lewis just decided he was going to have this and went about doing it. He exercised his control by his committee chairmanships and members' desire to be on the team. He threatened committee chairmen with their chairmanships if they didn't support the bill. There was a lot of behind the scenes work to get guys to stay in line and voting for something they really didn't want to vote for.

Interviewee 12:
The legislative leadership made it very clear to Governor White that if he intended to keep that kind of promise for salary increases, he was going to have to
offer the kind of opportunity for reform in education. Governor White made some pretty sweeping promises to the teacher organizations as to salary levels in his campaign for reelection. When the time for the legislature came it became apparent the legislature was not willing to grant those salary increases with the education product we were turning out. So there was no salary increase voted during the regular season.

Interviewee 15:

Hobby is the most powerful man in state government. He appoints the chairs in the Senate. There are only 31 members in the Senate. He's a man with a tremendous amount of power. Hobby is powerful because of his appointment powers and because of himself. He commands respect that no other does.

The governor couldn't get his program through the legislature. Then SCOPE was appointed. I don't think anybody at the time expected to do what it did. I've seen a lot of select committees. They study and say how deplorable the situation is, and the report is put away on a shelf. So there was this climate out there. Add to that the Texas Legislature telling people like me that we're not going to give you more money for the same old product.

Basis of influence ultimately boils down to knowledge of and ability to utilize facts and information. Speaker,
lieutenant governor, Perot, and others were able to get those facts together.

If you've got the governor, lieutenant governor, and Speaker absolutely hitched to a program, they can move mountains in a hurry. Happens very seldom. Almost never seen it.

Interviewee 9:

The governor's role was to say he was going to call the special session and you guys have to deal with it was his major contribution saying I'm not going to let this go away. I've got a political debt which was to the educators who had helped him get elected, and it was good politics.

1983 session we ended up in an impasse on all those issues. Political leadership realized they had to do something about it for business and economic reasons. Basis of the influence of Perot, White, Hobby, and Lewis was money and power.

SCOPE appointed by governor (one third), lieutenant governor (one third), and Speaker (one-third). That was the handwriting on the wall that it wasn't going to be White's show. It was going to be a legislative show.

Interviewee 4:

Lieutenant governor, governor, and Speaker were together. Had 100 votes, and when you have 100 votes in the House you can pass anything.
Interviewee 1:

SCOPE report read "The governor, lieutenant governor, Speaker of the House, Comptroller, and Mr. Perot...". This unity was one basis of these leaders' influence. Lieutenant governor has committee chairmen who were the instrument to lobby internally.

Interviewee 7:

Lieutenant governor and the Speaker came on board for the package because of the awareness that their governor who was going to be serving for 4 years was committed to making improvement in public education. And the realization that not only school teachers but administrators and others would welcome that if there was a way to do it. There was then a pressure created because politically education was the number one issue in the 1982 governor's race. Perot made it impossible for the coalition (Speaker, lieutenant governor, and governor) to maintain their intellectual credibility and not be supportive of the things he wanted. The miracle was to have circumstances where a governor had made education improvement his central political movement, got elected, and couldn't really deliver in the format he promised and had to come up with another format and happened to choose Perot.
Interviewee 6:

Lieutenant governor and Speaker got the word from the citizens. There were political considerations involved. It's hard to be against education, let's put it that way.

Interviewee 14:

The basis of their influence was their united effort and the leadership positions they held. Very few legislators really knew and understood all parts of the reform package, less than 25%.

Interviewee 11:

Basis of their influence is elementary when the presiding officers of the legislature want something, they are tremendously influential. That's inherent in the position, through their power to appoint, power to decide on committees, power to revive bills. Governor, lieutenant governor, and Speaker signed on with Perot early and committed themselves to the core of recommendations of the SCOPE. That was the driving force.

Interviewee 2:

Perot locked in the governor, the Speaker, and the lieutenant governor, and the Comptroller to a specific package. White got more than he bargained for when he appointed Perot. White ended up with a tiger in his tail. White, in my opinion, would have been very
happy with some sort of window dressing of reform, and then a substantial pay raise attached to it. But instead, he wound up with all this reform which teacher groups were opposed to in large part with the exception of the TFT.

White was not riding in the engine. He was riding in the caboose. He was just along for the ride.

Interviewee 8:

If it were not for Perot, in my opinion, that commitment that the Speaker, governor, and lieutenant governor made to Perot to carry out a program even though they were opposed to it, would answer most of the problems of this state. It would never have been passed. That was the only way that you were ever able to pass a piece of legislation that everybody was opposed to.

It is my opinion that Perot went back and negotiated with White, Hobby, and Lewis that if he put the package together that they would fight to approve it and stand behind it all the way, including an appointed board which was an absolute must to Perot. I think it was a closed circle of those four people, and they took the responsibility of carrying the House and Senate members along. They had a lot at stake. In fact, they had their whole reputation at stake. Their whole political future at stake. White took a
lot of risk in being for reform in light of opposition of the School Board Association, Texas Association of School Administrators, teacher groups, etc. All he had going for him was the parents. Eighty percent of the parents said it was time for reform. People who influenced legislation before were not the parents, they were the organizations. And every organization came out opposed to HB 72. But it passed anyway. The governor's reputation was at stake in giving the teachers a salary raise.

Interviewee 10:
Something of this controversy and this magnitude could not have moved without the tremendous support of the leadership in both houses. There were probably a few other members who yielded to the power of the chair, either the Speaker or the lieutenant governor. There is no question that there was a lot of influence exerted from those offices for people to get with the program. And that's typical.

Interviewee 19:
There was a lack of legislators to accept the governor's office as having influence. That is traditional the Texas legislature. Governor White had a total commitment to the issue of education. It was a personal commitment. No political reason. The governor was determined to make it his agenda.
Appendix N

Interview Data Related to Influences
Outside the Legislative System

Interviewee 6:

Business became aware because of publicity. Information coming out about Scholastic Aptitude Test scores declining, failure rates, etc. Without a good educational system, business can't survive. Without basic education to go into higher education, business suffers.

Influence on chambers of commerce was local educators, the issues, and Perot. Local superintendents. All chambers are involved in public education. If the local superintendents were behind education reform, then the education committees of the chambers would come forth with pressure on the boards of chambers with let's get involved, let's have reform.

Perot is an economic elite. The business economic elite was behind him. They were the driving force and a lot of them gave of their time and money for it.

Interviewee 3:

Basis of influence of people who testified before SCOPE was their knowledge.

Interviewee 6:

Legislators were getting mixed messages. The educators against reform, the constituents for it. Those against
something are always more vocal than those for it. That was the case here.

Mixed reaction on the part of teachers. Many were saying we have to do something to improve our ability to educate youngsters but others were afraid of being forced to do what they didn't want to do.

Texas State Teachers Association is strong enough to have some influence over any type of legislation. Some districts had a lot of influence in designing and shaping the tax reform bill. Dallas, Houston.

Interviewee 14:

I think SCOPE thought they had received considerable input from individual educators—from educations in local school districts that helped confirm their recommendations.

SCOPE, through the high visibility of the chairman, tried to go beyond the traditional education establishment and beyond the organizations to build a case for their recommendations.

Most of the program components of HB 72 came in part from the education community but mostly from SCOPE deliberations from the chairman and other members of the committee. There were many members on SCOPE who had education background serving on school boards, state school board, etc. So a lot of their agenda was generated from within the SCOPE itself.
Interviewee 5:
Perot spent the fall of 1983 on fact-finding missions with hearings all over the state. Interviewed teachers, principals, etc. For 3 weeks, he invited individual teachers in groups to sit in a conference room with him and talk. He would say, "What do you think are the problems in education today? What do you think would help?"
Influence came from outside forces that were created by virtue of the work of SCOPE and Perot. Basis of Perot's influence was his ability to capture the media's attention. Major newspapers in the state became interested in education reform.

Interviewee 6:
Without Perot's influences and money, it might have been slower getting done. Perot had the ability to communicate to the legislators as to what the objective was and what they were trying to accomplish. Good lobbying from Perot, business. Really all forces were behind education reform.

Interviewee 3:
Perot's staff was down there consistently lobbying. Without Perot it would not have happened. Even with the grass-roots movement demanding change, it still would
not have happened because of the institutionalism of education.

Interviewee 2:
Perot had two or three hired lobbyists working for him. The Chief of Staff for SCOPE (Luce) was down there constantly and was one of the main proponents and main lobbyist on the issue.

Interviewee 15:
The Rodriguez suit filed in state court was a further lever to pressure people into action. That was a real pressure point.
Maddox said that if the Rodriguez lawsuit is filed, we cannot defend it. Bullock told them that if he was called upon to testify that the testimony he would have to give would probably harm the state and help the lawsuit.
Bullock generated volumes of work papers on education. He determined the financial figures. He had just tons of information, and people trusted his information. So people turned to him, ignoring the Texas Education Agency. Whenever TEA put out information, the legislators tended to disregard it. That was a strange phenomenon. I've never seen anything like that. Before then and not since. The agency responsible for government running a program actually was viewed by the legislature as being as working against their own program.
Bullock ran a print out showing the effect of a
court-ordered equalization formula. So somewhere along
the line, they said we need to change the funding
system.

Interviewee 10:

The urbans and the Equity Center had an unusual but
cohesive alliance. I think they saw things in the
package that benefitted them mutually that made it worth
supporting. The urbans had been interested for years in
getting some kind of urban weight into the school
finance formula to reflect higher cost of urban
education, and the poor districts were obviously
interested in equalization. They struck a good bargain
and said we could have both.

Interviewee 14:

The Equity Coalition (Equity Center, property poor
school districts, and the Council of Urban School
Districts) in agreeing to a compromise position on
finance had much to do with the success of the
legislation.

If the support of the property poor districts and the
urban districts (the coalition) had not have been
supportive of the package, I don't believe the
legislation would have passed.

Interviewee 8:

Texas Education Agency had provided information in the
past and should provide it. They have all the
information and the records and should be the leading influence in providing any system for the state. It appeared that Mr. Bynum disagreed with the approach that SCOPE took and did a great deal to keep the provisions of HB 72 from being passed.

Interviewee 10:

SCOPE's recommendations were formulated into an initial legislative package. There were a lot of discussions in the Speaker's office and the lieutenant governor's office for weeks with various members. Taking that initial package and adding to, subtracting from. You have to remember, that wasn't their work product. They were going to be the ones to carry it to the floor, and they had to essentially make it their work product.

Interviewee 15:

Bullock was one of the major players in this one. The reason he was is because people had come to distrust the Texas Education Agency. The State Board and the Commissioner were players, but they were excluded from some of the very important decision making. They had no credibility. Nobody believed the information they put out. Bynum massaged figures, and everybody knew it. So as a result, people turned to Bullock for information.

Interviewee 13:

Raymond Bynum was Commissioner. He became less influential throughout the process. I never have
figured that out. Bynum went into that session having the respect of everybody in the process and came out of the session a much less prestigious person. He had influence prior to the process but lost it during the legislative process. There was general dissatisfaction on my part particularly in getting the numbers in a timely fashion. I was dissatisfied with the presentation of the numbers. They were not presented in a way that were a real aid to policy making.

Interviewee 11:
That session almost totally cut off the influence of the Commissioner of Education. He was very knowledgeable and up until that time furnished most of the information that led to legislative change.

Interviewee 2:
Perot picked up the tab for all this lobbying effort. I would have to guess he spent $2 or $3 million of his own money on this.
Perot's influence base is that he is an extremely successful businessman. Very well respected by the general public, and he's probably the most outstanding public citizen in the state of Texas. He's respected by the business community.

Interviewee 16:
Perot spent money to hire good people who had good working knowledge of the legislature.
Interviewee 17:

Basis of Perot's influence was him telling them what they want, what they ought to hear, what's bad, etc. And we came back, and we voted on the things in the SCOPE that he wanted to vote on.

Interviewee 9:

Economic elite was behind Perot. Perot had set up computers which had all of the Secretary of State's contribution information. Which is public record. He found out who contributed what to which candidates. If a representative over here was not doing what he was supposed to do, they would pull up all his contributors on there and start calling down the list and asked the contributor to call the representative and tell him we want him to vote "yes." That's not new. It goes on all the time, but it was so compressed and concentrated into 30 days and so openly funded. It's not been done that way before. Perot bragged on CSPAN he hired a bunch of lobbyists that he never used so that someone else wouldn't hire them. He didn't want them working the other side of the street. Hired them and put them in a back room and had them sit. Perot said on CSPAN that he spent $1 million of his own money.
Interviewee 7:

Perot was well organized, forceful, well thought of, but also people were aware that other states had started doing something. Other states were using some of these reforms. I'm sure that laid the ground for it. It sort of broke up the sacredness of the whole system.

Perot asked laymen outside of education common sense questions. Superintendents didn't always answer them well. Perot reacted the way most professional business people would and said this is a non-system. How can we expect quality?

As a businessman, he asked for some of the typical kinds of management information, and none of it existed. I think there was such embarrassment that then he had the momentum, and they had to stay with him.

Perot may have put $1 or $2 million into the whole process. One million for the committee operations, and one million for lobbying. By the time a lottery passes in Texas, or paramutual betting, have spent three, four, or five million over the last three sessions. Corporate interests. But because there is no identifiable person like Perot to make the enemy, few people talk about the economic elites passing a lottery. Many bills are passed by one million lobbying efforts over several years.

What was unusual about this one was that everybody could
personalize the debate because Perot was so visible, so outspoken, good on the press, irritating to those who couldn't out argue him or didn't have a platform to debate with him.

If you didn't have the very best lobbyists in Austin working full time, the House and Senate, racing all over, making sure nothing ever got out of control, it would have gotten out of control and probably would not have passed HB 72.

Interviewee 10:

There was a great deal of persuasion and counterpersuasion going on. Perot's lobbyists understood the members needs and what their constituencies were wanting. What they could do and what they couldn't do coming from their constituents. I think there was a lot of the lobbyists helping legislators go through the process so that they eventually felt they would be voting on their package. You were dealing with an extremely comprehensive package with several different pages that totally changed the face of Texas schools. And they didn't write it. Somebody gave it to them. I think that package formed the starting place and an awful lot of it remained as the basic framework of what passed, but I think there was a pretty dynamic process in-between where the members made the bill their bill.
I saw the lobbyists' role as being very much in the center of things and using their skills to persuade the members that certain things needed to be done and were very clear about what their agenda was.

Interviewee 14:
Perot and his hired lobbyists and staff spent considerable time in working with members of the legislature to influence their thinking in relation to the reforms. He devoted his attention to the legislative process and made sure individuals who were very close to him were very actively involved in the legislative process.

Interviewee 12:
Perot was one of the few men that would make that type of commitment of his own funds and public cost.

Interviewee 10:
I think some of the representatives from the suburban areas, etc. that had constituents against the reform package were hearing mixed signals. They were probably hearing from their classic school constituents that didn't like it. They might very well have been hearing from some of their business constituents and their PTAs and people like that they did not like it. There was strong recognition that the educational establishment is pretty tough to challenge on its issues. I think there was an awful lot of field work
going on out in the sticks in the various parts of Texas
in terms of organizing chambers of commerce and various
groups like that to be supportive of educational
reform. The quid pro quo was the largest tax bill we've
ever passed.
Within the traditional educational establishment, your
interest groups, your major players, teacher
organizations, didn't have that much influence in this
process. To much extent were locked out of the
process. That was an unusual phenomenon in itself.
They were perceived as not being supportive. And there
was very muchly either you're on the team or you're off
the team mindset. Are you a friend of this movement, or
are you an opponent? Came from the Speaker and the
lieutenant governor.
Financially the big losers were the suburbs and the
classic rurals. I think some groups just didn't take it
seriously. Did not honestly think it was going to
pass. Some of the groups miscalculated. They did not
participate in the process prior because they really
just didn't think there was any reason to. By the time
they did get down here in the latter part of the
session, it was too late. The decisions had been made.
The classic educational establishment was not deeply
involved.

Interviewee 11:
Influence on the legislators was not strongly coming
from the constituents. Then they started hearing about reform, and they started agreeing with it. And most of the time, it is that we give opinions sort of like we get information. I think 90% of our citizens get their information from television. And you get it in capsule form. And we get back input in capsule form. Like "I don't want to pay a sorry teacher the same thing I pay a good one. I want there to be a difference." We keep hearing that and when we direct it and say that means you, then support career ladder. We can attach our plan to public sentiment. That's kinda the way things work today more than there being great public outcry (some exceptions exist).

There was not a real grass-roots movement. It was the grass-roots acceptance of the principles in HB 72.

There wasn't a hue and cry for sweeping change.

Certain school superintendents ended up having more influence than others. Dallas, Houston, Ft. Worth had greater influence than TEA.

Teachers groups showed almost zero leadership. They were lost. Leadership is when you have the courage to disagree with your membership when they are uninformed. None of them had the courage for a moment to disagree with their membership. One exception was TFT.

Legislative leadership listened to the superintendents.

Interviewee 15:

The key thing was that early on the SCOPE committee
members identified that the teacher groups were irresponsible and were not going to provide any input. Perot and some of the other business people viewed us as a union, and so they didn't even want to talk to those guys.

At that time, the other three teacher organizations were running around saying reform is not needed. What we really need to do is put more money into the system. I think we had some influence on the governor and SCOPE in saying that putting more money into the system was not going to happen without reform.

I don't think the teacher groups had much influence on the SCOPE.

All teacher groups had been a coalition. Before HB 72 came up for a vote on the floor, the other three teacher groups were saying this is getting out of hand. They've quit preaching and gone to meddling now. Let's shut this session down, and we'll come back in the next regular session and get some pay raises for teachers. I told them that it won't happen in the next regular session because of the financial problems.

Interviewee 7:

Groups in education basically wanted the status quo with more money put into it. We fought perennial issues every session in the House education committee. Laymen didn't care about it at all. Back then (1977) the
disputes were among the educators rather than things of interest to the general population.
Perot brought things out in the open. People feel the schools have been asked to do too much and have been reduced to delivering the lowest common denominator.
Perhaps people in education are a little bit spoiled. What they do is so good in society. We all feel warm in our hearts about it, so there's not all that criticism educators get.

Interviewee 16:

Education community did not lose credibility as far as influencing policy. Credibility problem was with the public and legislators were in the middle. Legislators rely on their school boards, administration, and teachers or whomever is in the establishment that we all know.

What brought the education establishment and Perot together was the realization by our local districts that they needed to jump on this bandwagon because it was going to go anyway. Rather than be obstructionists, let's get what we want, too. Let's use it to our advantage.

Two ends of influence on legislators: Perot and education establishment.

Interviewee 9:

I think the educational community essentially got run over by outside forces.
TSTA and others were hitting hard on the salary and per pupil expenditures. Was a push to focus the deficiencies of economic support for education. Was really started in the late 70s and culminated in the 1982 election with Mark White making it one of the main things of his election.

The 1983 session was an impasse because we were demanding a whole bunch of things while the school boards, urban council, and others had different points of view on how we should spend that money and the House said until we find out exactly what you want, and we can be sure we can convince the voters it will be spent wisely and are going to have reform, we aren't going to vote the taxes. There were divisions within the ranks of education groups so there was an impasse that produced SCOPE.

There wasn't a loss of credibility of the educational establishment in 1983-84. It had been floating around for years. The educational establishment was pretty dead in the water in most respects. So this loss was not a new condition.

The House Education committee tried to revolt. They passed a totally different version. They were threatened extensively with losing their committee positions, looking chairmanships. It was probably the roughest session in 30 to 40 years.
Do you realize HB 72 never went through a committee as it was passed in the House?

I think we got a lot of things changed either in discussions with Perot and his people or through legislators who influenced the SCOPE product, or influenced the early behind-the-scenes discussions before the bill got put on the floor.

Management of the schools was not very highly regarded by anybody outside of education. There are some exceptions. It has been poor management, but also nobody has gotten the taxpayers to dig in and go which amazingly enough is now happening with White.

Interviewee 5:

If a common chord isn't struck in the public, the cycle can't continue. It won't feed on itself if the public is not saying they agree.

The public was saying I'm worried about my child's education and the quality of it, and I think it's less. I would say that every item that was ultimately put in HB 72 really came from those fact-finding missions. "No pass no play" didn't get invented in Perot's mind.

Teachers and principals in the droves came in and said you've got to do something to help us control special, extracurricular activities. We can't control it. These ideas came from individual educators. Not from any special interest group in Austin.
With the education groups, it's always, if you don't do this, our 2,000 members will vote against you. It varies from group to group.

The majority of both House and Senate education committees started off wanting to adopt an attitude of OK, gee, this little process of the select committee has gone on long enough. We'll get in here, and we'll write the legislation the way we want to working with the educational groups. There was not a single concept presented by any of the special interest groups.

I think the greatest tragedy of it all is all the talk you hear about educators were excluded, and all that is just nonsense. The truth of the matter was they were begged from the start to come forward, but the groups had an inability to do that. They're always scared they're going to offend one member over another. And as a consequence, they opted out of the process.

The representatives of the education groups do not truly represent the membership. They totally lost any credibility in Austin. Education groups were influential prior to this event.

Primary opposition came from the traditional allies of the educational establishment which was the House and Senate education committees. They were basically used to dealing with those issues all by themselves between the educational establishment and the Senate and House
education committees. They didn't take too well to outsiders being interested and involved in education legislation.

Interviewee 4:
Texas State Teachers Association used to draft every education law. Teacher groups divided from out of the National Education Association and lost power. Education interest groups were thrown out of the House which is unheard of.

Interviewee 8:
Texas State Teachers Association was even asked to leave the governor's office because of their opposition to the bill. They felt like they were detrimental to the process of the bill. So it's obvious they lost their influence in working out some compromises. Wanted their way or none, and they got none.

Up until 1975, two people made the decisions in the state. Dr. J. W. Edgar and L. P. Sturgen. They stepped aside, and there was a void as to who would take their place. The teacher groups did not have the influence nor did the new Commissioner of Education. American Association of School Administrators and Texas Association of School Boards filled some of that void. Urban interests became greater then also. Houston and Dallas were the first districts to commit full-time people and research to the lobbying effort for educational improvements.
The educational establishment had little or no influence on the recommendations that came out of SCOPE. The reasons for that is that the legislature depended on the educational establishment for the last 10 years for answers to educational dilemmas, and everything they came up with kept perpetuating the problem and not solving it.

When you have one third of suburban and one third urban and one third rural all competing for the same dollars, then you got into a logjam every time you tried to come to a compromise.

I can recall for 10 years every time we would get together, all districts and organization, to develop a plan, then when the legislature would start observing that plan, it would upset one group or another. Then they would be behind the scenes lobbying against it or to get something for themselves. That strategy destroyed credibility of organizations.

The experts came together and tried to put it in a legislative program that would produce what the parents were saying. So yes, it was a quasi-grass-roots approach.

Interviewee 14:

There was a great deal of criticism that was leveled at education and particular classes of employees and officials within the education community. There was a
lot of charges and criticisms related to curricular activities, to athletics, to coaches, to the so-called good ole boy network, to the education community wanting to preserve the status quo. That helped generate public sentiment in favor of what SCOPE was doing. By and large the education community was removed from supporting and having a major influence on the specific components of the legislation. That's evident by the fact that when we got down to the end of the legislative session, there was only one teacher group left standing in support of the legislation. The only teacher group that really played a significant part was the Texas Federation of Teachers.

Interviewee 12:

When I came to the legislature, I had a gentleman who was head of the education agency, and you had another gentleman who was head of TSTA, and they were very close. It appeared to me that the education agency was simply a speaker for the teacher organization. And if you raised questions as to if there were better ways to do this, you were almost isolated. Actually National Education Association and Texas State Teachers Association are the greatest impediments to improvement in education in the country. Credibility factor changed when people realized that TSTA was not representing improvement in education.
That they were, in effect, a teachers union. And were not devoted to improvement in education processes. They were devoted to the improvement of the conditions of their members.

TSTA was, at one time, an umbrella organization that included various subdivisions within the education community. Then various groups began splintering off from that umbrella and formed associations of their own. So that over the years you had a much broader input from the educational organizations into education policy. I think all these concerns is positive because we're getting a variety of points of view rather than being told this is what we want. The individual interest groups in education have lost their influence. They should have. No one group should have a solo voice on education policy.

Interviewee 17:

Educators were left out of the process because there was no good information there. It was an attempt on everybody's part to take care of themselves. Had the education establishment lost credibility with legislators? Oh yes. No question about it.

Interviewee 2:

The trade-off to teacher groups was we'll give you the money, teachers, if you will go along with the reforms. They were not interested. The leadership of the major
groups was willing to leave a billion dollars on the table for not wanting these reforms. I don't think they necessarily represent their membership.

Interviewee 3:
The old system was under the domination of one person. Commissioner did not want to rock the boat. Inbred mediocrity. Good ole boy system. Riddled with political patronage.

Interviewee 5:
Business leadership for the first time was supporting a tax increase for education. I think that was because Perot convinced them that that was good business. Basis of business community's influence was a combination of persuasiveness, perceived representation of other people or groups, and I think business leaders are perceived as representing various companies they represent, the taxes they pay.

Interviewee 3:
To make that drastic change there had to be massive support from the industrialists and the powers, the chambers of commerce.

Interviewee 13:
It was unusual for chambers of commerce to be that involved in education issues. I would say it was the first time in the 14, 15 years I've been here I've seen that. They've always been
interested in education in an abstract sort of way. But I've never seen them get that much involved in it. Why? For one thing, for all the speaking Perot did around the state, frequently those meetings he spoke at were arranged by the chambers of commerce. And they got involved in that way. I think just a general concern about the economic well-being of the state.

Interviewee 8:

Economic elite of Texas had the greatest influence in passing it. They see education as an economic problem. The illiteracy rate in this country is increasing by 2 to 2 1/2 million a year because of public education and not addressing the needs of the minorities or the poverty areas of our country. And unless that changes, by the end of this century, we won't have any skilled workers or middle class in this country. Somebody has to check that. That's what Perot kept telling the business elite. He said this is a serious problem for the future of this state and this country. If Texas is going to continue being 47th in illiteracy rate in this country, there is no way we can ever expect to survive as a state.
Interview Data on Ross Perot

Interviewee 19:

The governor knew we needed to increase taxes. He knew Ross Perot's behind the scenes involvement would be successful with the group who normally did not recommend tax increase.

Interviewee 2:

So the concept of the SCOPE committee was brought out and the governor in order to give credibility to this committee swept in Perot as head of it. To me that was the key in that Perot took it very seriously and followed it through.

To a large extent I credit Ross Perot with the Texas movement. A heightened awareness of the issue is the major thing that caused reform.

In terms of Republicans and Reagan, in terms of the specifics of passing it in Texas, the influence was really Perot building up public support for reform. He went out in the state and created a public awareness of reform. People did not have any concept of the details except for a few things like no pass no play. People understand that. Most of the rest of the issues the general public wasn't aware or didn't understand but Perot created a mood of 'are you for me
or are you again me' in terms of reform.

Other major players were Perot. He backed off being in Austin during the session because his lobbyist advised him to stay away. He hired 2 or 3 lobbyists to work for him. Jack Delahorn and Rusty Kelly worked for him. Tom Luce, who was the chief of staff for the committee and Perot's personal attorney. He was down there constantly and was one of the main proponents and main lobbyist on the issue. He was Perot's person on the scene.

Perot picked up the tab for all of this lobbying effort. For Luce and everything. I would have to guess he spent 2 or 3 million dollars of his own money on this. Lots of times these select committees are formed, they make recommendations and then nothing happens. Legislation isn't even proposed. When Perot went about following it through, White ended up with a tiger in his tail. He got a lot more than he bargained for when he hired Perot.

Perot's influence base is that he is an extremely successful businessman. Very well respected by the general public, and he's probably the most outstanding public citizen in the state of Texas. He's respected by the business community. He went about selling the general program. That's how he was able to do it.
Interviewee 3:

The governor called this committee together. At first I didn't think anything was going to happen because so many other committees had not been successful in change. But Ross Perot felt there would be change and was excited about it.

Ross proved to be a lightning rod. Gathered all the electricity of the coaches and vocational education people. Vocational/agriculture people are a very important lobby. All of this made headlines in the paper and it galvanized citizen support. Which I think was more important than the lobbying efforts.

The state responded that this was a much needed thing. To my surprise the whole thing went through. Perot was down there consistently lobbying. His staff was. Lewis and Hobby were staunch supporters of it. Were very supportive of education. Did have certain reservations of certain aspects of the report. Hobby and Lewis' support was influenced by a combination of being a part of SCOPE and the influence of the business elite of Ross Perot. With Ross chairing the committee, it got the attention of the powers that be in industry and business. When get somebody of this caliber, you will get more attention. Perot was very determined to do something. Made no bones about it that he was not wasting his time. He expected some
results. He recognized that this country is running out of natural resources. And that our most valuable resource happens to be our young people. Without Perot it would not have happened. Even with the grass-roots movement demanding change, it still would not have happened because of the institutionalism of education. To make that drastic change there had to be massive support from the industrialists and the powers. Chambers of commerce.

Interviewee 5:

There was a general raising of awareness of the importance of education in the changing economy. Like the arising awareness today that's taking place with respect to the drug problem. Increased media attention. Increased public attention. "A Nation at Risk" began the process of the media attention. That was the start of the whole process. When that starts in the media, if it strikes a responsive chord with the public, it feeds on itself and the public begins to talk about it. Second, some major newspapers in the state such as the Dallas Times Herald and the Dallas Morning News became vitally interested in it and third, was Ross Perot's ability to communicate and command media attention and coverage and through that to communicate to the public.
They (parents) were saying 'I'm worried about my child's education and the quality of it, and I think it's less.' If chords aren't struck, then it doesn't continue, and it obviously did continue. It was that factor plus Ross Perot traveled the state. His ability to capture the media's attention was a major factor. Ross was a very effective spokesman for change.

Highway lobby and Highway Commission were supporting the increase in the gasoline tax and sales tax. And then the grass-roots input that Perot went to various cities and organized. Business leadership for the first time were supporting a tax increase for education. I think that was because Ross Perot convinced them that that was good business.

SCOPE was created that summer and Ross was named chairman and spent that fall on fact-finding missions with hearings all over the state. Interviewed teachers, principals, etc. For 3 weeks, he invited individual teachers in groups to sit in a conference room with him and talk. He would say, 'What do you think are the problems in education today? What do you think would help?' I would say that every item that was ultimately put in HB 72 really came from those fact-finding missions. "No pass no play" didn't get invented in Perot's mind. Teachers in the droves
came in and said and principals said you've got to do something to help us control special, extracurricular activities.

From the very beginning, Ross very early recognized that dealing with the concept of equalization was a critical issue. That if schools were going to be improved, particularly for the poor children, who were not receiving a first-rate education, we had to do something for equalization. He committed early on much to the anguish of many saying 'Oh my gosh, we can't deal with equalization.'

I believe Perot was the single most important element in that he created the conditions that facilitated reform. He was the key ingredient. Had the personality to raise the consciousness of the issue on the front page.

Interviewee 6:

Governor was smart in involving Perot. He had the ability to communicate to the legislators as to what the objective was and what they were trying to accomplish. He went state-wide with it which caused a lot of grass-roots pressure from the constituents of all the legislators.

Perot was so well organized. He knew what he wanted. Knew what his charge was from the governor. Had the lobbying forces so organized that the legislature,
every place they turned, they were looking at someone lobbying for reform.
Without Perot's influences, and his money, it might have been done in a regular session and not a 30-day one.

Interviewee 7:

Many of the top 4 or 5 ideas that came out of the 1984 reform were perennial ideas. They weren't new ideas and I don't think the political basis supported this reform. What changed Ross Perot. The main difference in SCOPE was the momentum Ross Perot generated and his determination to do something.
Perot is more of a diplomat than he seems and he kept that coalition going. He made it impossible for them to maintain their intellectual credibility and not to be supportive of the things he wanted. As a businessman he asked for some of the typical kinds of management information and none of it existed. I think there was such embarrassment that then he had the momentum and they had to stay with him.
Perot was well organized, forceful, well thought of, but also people were aware that other states had started doing something. If you have just put Ross Perot in Willis Tate's place with the same blue ribbon committee and the same factors, not much different would have happened. You had the combination of Perot
and the fact that the legislative leaders had been pushed into a corner and were committed to doing something. What was unusual about this one was that everybody could personalize the debate because Perot was so visible so outspoken, good on the press, irritating to those who couldn't out argue him or didn't have a platform to debate with him.

Interviewee 8:

Perot, after talking to several people throughout the state, took it upon himself to widen the charge that the governor gave him and said if you want salaries for teachers, then we're also going to address the equity questions and try to find a complete resolution.

Before SCOPE came into place, Perot did his homework very well. He talked to people all over the state as to what needed to be done. It is my opinion that he went back and negotiated with the White, Hobby and Lewis that if he put the package together that they would fight to approve it and stand behind it all the way, including an appointed board which was an absolute must to Perot.

I remember one night when Mr. Perot told me to come and see him. And that was the first thing I told him that we don't need another study in this state. We have more studies on the shelf that have never been
used. I said if you'll pull those out for example, Connelly's was an in-depth of research and was never used. There were two task forces before the Clements task force. I served on that. The Clements groups recommended the things you really need to help solve the problems but the legislature was not ready for it nor were the educational institutions or the educational organizations. There were not ready for it nor in 1984. But the difference is that someone had to make a judgement decision that this is the only real solution and that you cannot arrive at this solution by leaving it up to organizations that are competing with each other. It's even risky to think that the legislature can do it. If it were not for Perot, in my opinion, that commitment that speaker, governor, and lieutenant governor made to Mr. Perot, to carry out a program even though they were opposed to it would answer most of the problems of this state, it would never have been passed. That was the only way that you were ever able to pass a piece of legislation that everybody was opposed. The only reason the business community accepted it was because they had someone of the status of Ross Perot that could communicate it and sell it to them.

Interviewee 9:

SCOPE was jointly appointed by governor, lieutenant governor and speaker. That was the handwriting on the
wall that it wasn't going to be White's show, it was
going to a legislative show. When Perot got into the
act it took on its own life and a lot of things that
were not necessarily intended by the frames of the joint
resolution. Perot's critical role was to go beyond the
legislative leadership and bring out the national scene,
looking at what the reform experts were saying in some
of these think tank operations in Atlanta, Denver and so
forth. Ideas were coming from decision makers outside
the educational community to do what they wanted the
educators to do. That's the element that Perot brought
in which I think was with agreement of Hobby and Lewis
and perhaps White.
Perot hired the experts who gave him the information
because they didn't have it. He got on CSPAN 6 months
later and said I spent a million dollars out of my own
pocket on the SCOPE and the special session. He was
bragging about it. He hired the experts and the
lobbyists to make sure that it all came together.
Economic elite was behind Perot. There was a very heavy
hit in the whole management of the schools in Texas.
That has never gotten the publicity of other parts of
the reform. Perot's whole agenda really was to get rid
of the incompetence and the administrators as well as
the teachers. He wanted to turn it into management by
objectives business operation.
I met with Ernest Boyer and Perot in his office. That was January 1983. Talked about the Board of Regents in New York. Boyer said it got it out of the day to day political arena and got it into looking at what was good for the welfare of the state. These people were appointed. That fit right into what Perot was thinking already. His model is to have a top management at the state level run by a board of directors (like a company).

Perot had set up computers which had all of the secretary of state's contribution information. Which is a public record. He found out who contributed what to which candidates. If Representative Jones over here was not doing what he was supposed to do, they would pull up all his contributors on there and start calling down the list and asked the contributor to call Representative Jones and tell him we want him to vote yes. The contributor would call the legislator and say, look, you better vote yes on this amendment. That's how new, it goes on all the time but it was so compressed and concentrated into 30 days and so openly funded. It's not been done that way before.

Perot bragged on CSPAN he hired a bunch of lobbyists that never used so that someone else wouldn't hire them. He didn't want them working the other side of the street. Hired them and put them in a back room and had
them sit. Money worked. And that's true with the Texas legislature in generally. I've been in different states and this in unbelievable.
The governor had to fulfill his commitment and he was looking around at all these other governors doing it in Arkansas, North Carolina. So he figured I can do this and it will ride me to the crest and be published in and out of state and I will be doing a good thing. I'll be helping my political supporters, I'll be doing something good for the economy, something good for kids, I'll be becoming popular. How can I lose? So he did it and when the legislature came to session he found he couldn't control it. Perot took it way beyond what a lot of people had in mind. He had the charisma and the know how to do the organizing of quick projects with lots of experts and lots of money and lots of special help. The deficiencies are that it was done too fast in the process. And it was implemented immediately with no transition. No time to buy in by the people who had to carry it out.
Perot has very little use for the administrators. I personally saw him take Eli Douglas who was the TASA president and cut him into a thousand little pieces in front of the whole establishment when he testified before the SCOPE. And he did it on purpose. He did it with great finesse. And made him look like a fool.
Perot was saying, you mean to tell me that you're representing all the top management of the school district, and you can't tell me the answers to the following questions? You can't explain why these things are as bad off as they are "and you're standing here representing yourself as the leader." He wasn't after Douglas, he was after superintendents and school districts. So he was going to forces it would happen or else. He figured he wouldn't be around to spend a lot of time on it a year or two later so he was going to do it now. He was going to invest a hell of a lot of time and effort and money. So that he would force everybody to get thrown up against the wall. That's exactly what he did. Now all the erosion is coming and everybody goes back to doing what they used to do.

Interviewee 10:

Perot did a masterful, a textbook job, of mobilizing public support.

Interviewee 11:

Perot was catalyst to all the right things and the right time.

Interviewee 12:

The legislative made it very clear to Governor White that he intended to keep that kind of promise for salary increases, he was going to have to offer the kind of opportunity for reform in education. I think one of the
strokes he made was in appointing Ross Perot to chair that. One of the few men that would make that type of commitment of his own funds and public cost.

Interviewee 13:

It was amazing to see the way the Perot committee functioned. There's always some interim committee on education, school finance or something. So the Perot committee itself was not a new animal. It had lots of predecessors. The credit for putting the emphasis the way it was really belongs to the speaker. He took a very strong position very early and said that I'm not going to pass a tax bill and I'm not going to raise salaries until we do something about quality of education. And that was really the speaker's insistence that led to the legislation and the appointment of the committee. It was a stroke of genius on Mark White's part to get Perot to do it. The recommendations themselves aren't really very much different from what any similarly constituted commission well led by intelligent, concerned people would have come out with. What did make the Perot committee unique was Perot's ability to dramatize an issue. It really wasn't so much what he did while the committee was meeting and reaching its recommendations and so forth but it was the selling job afterwards. They did an extraordinary job. I have never seen anybody that is Perot's equal in dramatizing an issue.
Basis of Perot's influence was his ability to capsule and dramatize an issue.

Interviewee 14:

Outside influences were Mr. Perot and his hired lobbyists and staff. They spent considerable time in working with members of the legislature to influence their thinking in relation to the reforms. He devoted his attention to the legislative process and made sure individuals who were very close to him were very actively involved in the legislative process.

Interviewee 15:

White appointed Perot to the chairmanship of SCOPE. And he brought his special magic to the whole affair, and I would credit him with making the difference between Connolly and all the other select committees. None of the reform would have come to fruition if it were not for Perot whose energy, personal resources, manipulation of the news media, and the processes of government. I think everyone underestimated the man's ability.

Interviewee 16:

Resources of Ross Perot were very important. Spent money to hire good people who had good working knowledge of the legislature. To be sure the support that was out there could be tapped and focused on the legislative level.
Perot was a well-respected Republican and generated the feeling that this is what we should be doing. Perot blunted a lot of the force that education interest groups would otherwise have had. Used media and plain ole politicking. He had a battery of people who all had contacts that knew how to articulate issues. Personally carried it to chambers of commerce, civic groups and organizations throughout the state. Did advertise and generate a whole lot of favorable publicity.

Interviewee 17:

Mr. Perot was a major force. Perot was as much a hindrance as he was a help. Because Perot was belligerent toward the education establishment from the start. He never brought the education establishment into the process. It happened as though they were attacking the enemy, leaving me, the person most responsible for seeing that it passed, to defend the education establishment that I was trying to reform. Because without them being positive when this thing was over, we were running things, and not helping. He was coming out as though they were the enemy. He saw Senator Parker and myself as being part of that. So we had that to contend with, and we were having to pull and tug as well as follow and lead. Because of that rhetoric that everybody was leading in the one direction. We went out and listened to Mr. Perot. He
had preconceived notions. Once they were set, they were set the rest of the time. About the second month, it was a waste of time to go on those trips. You heard the same thing again and again. We are teaching no math and science, we're so far behind in this state that we'll never catch up with the rest of the states. It is a terrible situation that will take years. He was preaching . . . so there we were in the midst of all that. Him telling them what they want, what they ought to hear, what's bad, etc. And we came back, and we voted on the things in the COPSE that he wanted to vote on.

Interviewee 18:

Perot's people were very important to the process.
### Appendix P

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REFERENCES


