A Brief History of the Origins of the Organization of Institutional Affiliates (OIA) and the Government Relations (GR) Program within AERA – 1968 - 1978

During the 2012 Fall Policy Meeting, the OIA Executive requested that a statement be prepared about the origins of the organization. This document is an effort to respond to the request. It should be considered a work in progress and anyone with additional knowledge about the development of the government relations or OIA programs in this period is encouraged to contact Dr. Sroufe at AERA.

The earliest mention of an AERA interest in providing advocacy for education research policy is found in the minutes of the May 1968 meeting of its Executive Board. At this meeting a committee was formed and authorized to “review AERA’s role in Washington.” This new Education Policy Committee was chaired by Roald Campbell. Other members were Stephan Bailey, Francis Chase, and David Clark.

The committee prepared a report, “AERA and National Policy Making for Educational Research.” The report itself has not been located; however, the minutes of the February 1969 Council meeting indicate that it recommended that “the community of researchers play a stronger role in influencing the policies of the federal government on the nature of support for educational research.” It was further recommended that the Executive Officer develop and maintain the extensive communication network required to carry out the recommendation. This seemed to some on the Council to be an excessive burden on the Executive Director, and it was determined instead that the Association President would establish a committee to assist the Executive Director in “developing and maintaining closer contacts between key administrative and congressional leaders in Washington . . .”

The Council returned to this issue in December, 1969. At that time, some (e.g., Krathwohl) expressed the view that the Association was moving too slowly; others (e.g., Getzels, Millholland) wondered if AERA should be involved in shaping policy: “. . .perhaps the Association should be an organization that fosters research among its members and not be involved with fostering public policy in research.” Ultimately, a motion to explore the feasibility of establishing an affiliated organization as a 501(c)6 – a designation that would permit lobbying – was passed. When the issue of advocacy was next raised at the February 1970 meeting of the AERA Council, the idea of an affiliated organization received little support. An
alternative proposal authorizing recruitment of an intern from the Washington Internships in Education program to assist with federal research advocacy for a one year period was adopted. (The individual recruited was William Russell.) In January 1972 the Council returned to the idea of establishing an affiliate that would have a 501(c)6 tax status but took no action.

At the December 1974 meeting Council discussed the idea of receiving contributions from “various non-profit R and D programs” that would support AERA if it were to establish a professional liaison program. Those providing this support were to be called “institutional affiliates.” A motion was adopted to provide this new category of membership for a two-year period, and to have the AERA staff solicit members (and contributions). A standing committee was to be appointed to oversee the work of the institutional affiliates.

However, concerns about engagement in federal policy never fully abated and in the January 1975 Council meeting one member stated that “AERA should not be involved to any great extent in federal affairs.” However, other Council members expressed pleasure about the apparent success of two briefing meetings that had been arranged at the White House with financial support of the Professional Liaison Program. The issue was assigned for overnight reflection. Subsequently, a motion was passed creating a full time government liaison position to be supported with funds from the Professional Liaison Program (i.e., the institutional affiliates).

Consequently, “Institutional Affiliates” actually supported the advocacy efforts of the AERA prior to the creation of the Government and Professional Liaison program (now called the Government Relations program). The Association’s annual report in 1976 states, “several R & D institutions supported advocacy efforts such as providing testimony and undertaking dialogue with other interested groups and federal agencies.”

Institutional Affiliates identified in 1976 included both research organizations and universities. Among the research firms providing support were the American Institutes for Research, College Entrance Examination Board, ETS, CEDaR, Far West Laboratory, Northwest Laboratory, Stanford Research Institute, and the Human Resources Research Organization. Universities included: TC, Temple, NYU, Syracuse, Wisconsin, Stanford,
Minnesota, LRDC, Oregon, Boston University, Chicago, and Texas A and M.

(The central research policy topics in 1976 included legislation directed toward protection of human subjects, the reauthorization of the National Institutes of Education, and congressional hostility to the National Science Foundation, based largely on its funding of a controversial curriculum, Man: a Course of Study).

The central office work for advocacy was handled by then-Executive Officer, Bill Russell. However, in 1976 a staff position in government relations was advertised and subsequently filled on a trial basis. The position again was supported by outside agencies, including the Institutional Affiliates, rather than by the Association.

Association leaders expressed ambivalence about the Institutional Affiliates for two reasons: (1) some feared that engaging in advocacy about education research would discredit the scientific base central to the Association’s work; (2) others feared that the level of support provided by the affiliates would shape the policy agenda of the Association toward their ends.

The perceived tension between increased visibility and advocacy, on the one hand, and scientific legitimacy, on the other, has never been entirely resolved within the Association. However, in 1977 then-president James Popham, forcefully expressed his view favoring greater advocacy:

My number one priority is to create within AERA the capability to act more effectively in the shaping of federal policy regarding educational research and development. . . . We must create meaningful mechanisms whereby the Association can influence education R & D policies in both the legislative and executive spheres of government. . . . We must push for both improved quality and increased relevance of educational R and D, thereby increasing the likelihood of continuing support for this important endeavor.

Following the lead of Popham and others, including Bill Russell, in 1978 the AERA Council approved continued support for the government relations program from Association resources and created the Organization of Institutional Affiliates (OIA) as a formal organization replacing the Institutional Affiliates. The membership dues of OIA were modest by
design – especially when compared with previous contributions – and universities soon outnumbered other research institutions.

The OIA Bylaws include a brief history that includes two paragraphs shedding light on the thinking of the AERA Council at the time OIA was organized. (This undated statement was presumably written by Laurence Iannaccone, who was active with GR at the time; the discrepancy in dates of this narrative and his can be resolved: he is mistaken.)

The Organization of Institutional Affiliates is the outgrowth of two movements within AERA. The first is represented by the formation of the Government and Professional Liaison Program by Council action in 1974, and the creation in the same action of a standing committee, the GPL Committee, to guide the program. In June, 1977, the AERA Council approved a fulltime staff position to be devoted to the GPL Program and devoted core association resources to support GPL activities.

The second movement is represented by the creation of a category of membership in AERA for institutions which find special value in being affiliated, as institutions, with the Association. By creating this type of membership, AERA anticipated adding to its strengths as an advocate of educational research.

The original bylaws of the OIA included a preamble that provided five dimensions of the work anticipated for the organization:

(1) To work with the GPL Program on federal policy questions with a bearing on education research (reauthorization, appropriations, helping federal research agencies in short and long range planning and in administrative law).

(2) To help AERA be effectively heard before Congress (monitoring legislation, rapid response network, maintaining a “presence” in offices of Senators and Representatives so that affiliates are looked to as sources of expert opinion, expanding the membership so more offices can be covered).

(3) To make affiliates’ issues and positions known to GPL.

(4) To facilitate collaboration with other organizations on legislation or policy issues.

(5) To lend financial support to the GPL program.
The expectation that the OIA would provide financial support to the GPL program was rejected by the Council in March, 1978. In discussion of a special report to the Council in 1978 about the GPL program it was made explicit that the program would be supported by general Association funds. It was also made clear that any income from institutional affiliates would be part of the general AERA fund and would not contribute directly to activities of the government relations program.