



## SAVE Endorsement Policy and Procedures

### **1. PURPOSE**

To promote, protect, and defend lesbian, gay, bisexual and transgender (LGBT) equality by supporting candidates running for political office whom uphold the principles of equal liberties regardless of a person's sexual orientation or gender identity or expression.

### **2. NON-PARTISAN POLICY**

SAVE recognizes that strong pro-LGBT candidates are not limited to any one political party and maintains a non-partisan approach in our endorsements.

### **3. OVERVIEW**

SAVE's intent in each endorsement decision is to endorse the most qualified candidate, irrespective of party affiliation, sexual orientation, or gender identity or expression.

The SAVE Endorsement Process (hereafter referred to as "the process") is created by the SAVE Endorsement Committee and describes the process for candidate endorsement decisions.

The Endorsement Committee is a standing committee set by *the bylaws of SAVE* which falls under the organizational authority of the SAVE Board of Directors.

The Endorsement Committee shall meet at least twice a year as called to order by the Chair of the Endorsement Committee in order to review the Miami-Dade County Election Supervisor's elections calendar for municipal, county, school board, state legislative, state cabinet and judicial and other races, and recommend races in which SAVE should consider engaging in an endorsement.

The Endorsement Committee with staff input shall identify all key issues to be included in the candidate questionnaire for each respective race. The issues to be included in the questionnaire shall reflect SAVE's policy objectives. The Endorsement Committee shall be responsible for the endorsement process, panel recruitment and training as well as maintaining the integrity of the process.

#### **4. ENDORSEMENT COMMITTEE STRUCTURE**

The Endorsement Committee operates under the authority of the SAVE Board of Directors and is led by a Committee Chair. Committee members are made up of board members and volunteers interested in the policy and endorsement components and have accepted and signed a Committee Commitment Form. Diversity and representation are important values of this committee.

The Endorsement Committee will make all final endorsement decisions. The SAVE Board of Directors will extend organizational authority and ratify the Endorsement Committee's selections and process for each cycle. An endorsement cycle shall commence with the issuing of candidate questionnaires and conclude with the SAVE Board of Directors endorsement authorization, endorsement announcements and event as well as the final committee debriefing to incorporate any changes for the next election cycle.

#### **5. RESPONSIBILITIES OF ENDORSEMENT COMMITTEE MEMBERS**

Endorsement committee members must execute a written commitment, confidentiality and conflict of interest form, pursuant to the following ***responsibilities***:

- Commit in writing to the general development, communication, and actions of SAVE's Endorsement Committee;
- Agree to actively promote and publicly endorse SAVE's Endorsement Committee and its objectives;
- Provide names and contacts of potential committee or panel members;
- Avoid conflicts of interest and appropriately handle actual or apparent conflicts of interest in accordance with ***SAVE's bylaws***;
- Assist in identifying the municipalities, cities and other races the SAVE Endorsement Committee will be conducting its endorsements;
- Develop a timeline for each endorsement;

- Review, revise and revisit candidate questionnaires and related correspondence to candidates;
- Contact the candidates, staff, and or campaign managers to schedule potential endorsement interviews;
- Ensure the confidentiality, distribution and timely collection of candidate questionnaires;
- Conduct panelist training session
- Serve as a Panel Leader of an endorsement panel upon request;
- Analyze and research pertinent information about a candidate's viability as provided by a candidate, public information, other key stakeholders, ***local PACs***, SAVE ***subscribers*** and community members from the respective municipality;
- Educate the candidates on LGBT issues and SAVE's legislative agenda and priorities.
- Announce, publicize, and promote SAVE endorsements.
- Organize and manage endorsement celebration.

## **6. ENDORSEMENT PANEL ROLE AND RESPONSIBILITIES**

The endorsement panel is responsible for evaluating each candidate in a particular race and vetting their candidacy, with the purpose of assisting the Endorsement Committee's endorsement decision. Each panel will at a minimum be comprised of 2 SAVE Board members. The endorsement panel will, for each race, review the completed candidate questionnaires as well as any additional research and information collected on the race and the candidates. The endorsement panel shall evaluate the candidate, review and clarify the candidate's questionnaire answers, obtain a personal commitment to honor the

responses to the questionnaire, and discuss LGBT issues, as well as other issues affecting the community, municipality, or district.

The endorsement panel, after deliberations, shall complete a candidate scoring sheet and be polled as to their individual scores, evaluations and recommendations for endorsement in the race, and those individual evaluations and recommendations shall be conveyed to the Endorsement Committee.

At the end of each endorsement cycle, the endorsement committee along with all panelists shall conduct a debriefing session where any changes to the process are deliberated and instituted.

## **7. CONFLICT OF INTEREST**

Members of an endorsement panel must sign a conflict of interest statement disclosing that the endorsement panel member does not have any real or perceived conflicts of interest. Anyone who has donated or otherwise made any kind of commitment or maintained any kind of relationship to a candidate or a campaign must disclose such relationship. At the discretion of the Endorsement Committee Chair (or if the Chair is the person with the apparent conflict, then at the discretion of a two thirds majority of the Endorsement Committee) that member should recuse himself or herself from participation in that panel or any contact with any panel members up to and including final endorsement. Final endorsement occurs when the SAVE Board of Directors authorizes the decisions of the Endorsement Committee as noted by the Secretary of the Board of Directors and communicated to staff.

## **8. CANDIDATE ENDORSEMENT CRITERIA**

Endorsement decisions shall be based on established criteria. The endorsement criteria are as follows:

- a. **Public Record** – The candidate’s public record includes remarks or voting history and other concrete verifiable public records. Positive or negative voting records on key initiatives are given consideration to endorsement decisions.

- b. **Position on the Issues** – The candidate’s written position on key LGBT issues pertaining to the office the candidate is seeking is critical to endorsement.
- c. **Viability** – The candidate and campaign plan must be able to provide a plan demonstrating a reasonable chance of winning.
- d. **Advocacy** – The candidate’s proven advocacy in support of LGBT issues outside of public office strengthens the endorsement bid.
- e. **Personal History** – The candidate’s life outside of politics is weighed against their ability to become successful policy makers.

## 9. CANDIDATE QUALIFYING REQUIREMENTS

In order to be eligible for a SAVE Action PAC endorsement a candidate must:

- a. Be a qualified candidate according to his/her municipal, county, and/or state election laws;
- b. Complete the SAVE questionnaire; and
- c. Support SAVE’s policy goals.

## 10.SPECIAL ENDORSEMENT CIRCUMSTANCES

In special circumstances, the Endorsement Committee may decide to modify or amend the endorsement process. These modifications will ultimately require the approval of the SAVE Board of Directors.

**Dual Endorsements** - SAVE strives to endorse a single candidate in every race. In the rare event that two candidates are viewed equally competent and the Endorsement Committee cannot decide upon a sole endorsement, SAVE may either co-endorse or elect not to endorse upon the discretion of the Endorsement Committee and upon ratification by the SAVE Board of Directors.

**Alternate Elections** - Some municipal races do not allow a candidate to run for a particular seat and instead are elected based on the total number of votes the candidate receives. In these circumstances SAVE may decide to endorse all,

some, or none of the candidates based on endorsement criteria and organizational priorities.

**Primary Elections** – SAVE reserves the right to endorse in primary elections. Primary elections will follow the same policies and procedures as general election endorsements.

**Run-off Elections** – SAVE may issue an endorsement during a run-off election based on the information gathered during the initial process or may reopen the process anew at the discretion of the Endorsement Committee.

**Re-endorsement of Incumbents** – SAVE reserves the right to re-endorse incumbent candidates running for re-election for offices they currently hold. All incumbents seeking re-endorsement may be considered for endorsement prior to qualifying dates for their office. This is considered an early endorsement. This special endorsement will be reviewed by the Endorsement Committee on a case by case basis. All incumbents seeking re-endorsement are required to submit a completed SAVE Action PAC questionnaire and a one page memorandum outlining the candidate’s support for and record of LGBTQ equality while in office. Upon review of the submitted documents, the Endorsement Committee will convene to make its recommendation to the SAVE Board of Directors whether or not re-endorsement of the incumbent is merited. Upon ratification or failure to do so by the Board of Directors, SAVE Action PAC will notify the candidate(s) of the decision. Incumbents not receiving an early endorsement will be afforded the opportunity to participate in the regular established endorsement process delineated in sections 8, 9 and 11.

## **11. PANEL DECISION**

Each endorsement panel will select an endorsement Panel Leader for administrative and organizational support. The endorsement panel will convene at the commencement of the endorsement process, as called to order by the Endorsement Chair, and immediately following the last interview of all candidates in a particular race and deliberate on the endorsement. The members of the panel will individually score, deliberate and vote. The Panel Leader will convey the results along with notes to the Endorsement Committee Chair ONLY. The Endorsement Committee Chair ONLY conveys the committee’s decisions to the SAVE Board of Directors and the Executive Director. The Board of Directors may

return the decision to the Endorsement Committee for further deliberation if information has not been considered or other special circumstances arise. Upon the re-presentation of the panel's decision, the Board of Directors may vote not to endorse in said race if such vote carries a 3/4 majority of the Board of Directors. Final endorsements are voted on for ratification by the Board of Directors. No endorsement has occurred until a final endorsement has been authorized by the SAVE Board of Directors.

## **12. AFTER THE ENDORSEMENT**

The respective Panel Leader will call the candidate participating in the endorsement process to inform them of the Board of Director's decision and notify staff to implement all approved endorsement benefits.

The decision shall simultaneously be communicated to SAVE's membership and may be distributed to the public via media release. The endorsement communication will clearly identify the criteria used by SAVE in its endorsement decisions.

## **13. ENDORSEMENT BENEFITS**

SAVE may provide the following endorsement benefits. Benefits are subject to change based on organizational resources and capacity. SAVE endorsements and recognitions are issued for the current election cycle only and are revocable at any time.

- Press release announcing candidate endorsements;
- Endorsement Celebration Event
- Two (2) e-blasts to its constituents urging them to support endorsed candidate(s);
- SAVE logo on campaign materials;
- Endorsement palm e-card or palm card to the SAVE membership and/or events;
- Endorsement announcement on website; and
- Link to candidate's website from the SAVE website.

The following is a list of possible additional benefits offered to those candidates that receive SAVE's endorsement. Benefits are subject to change at the discretion of the Endorsement Committee.

- Staffing for campaigns
- Outreach for voting recommendations
- Staffing at polling places
- Robo/Automated-calling
- Fundraising
- Phone banking
- Palm card distribution at targeted events

#### **14. POSITIONS**

##### **Endorsement Committee Chair**

Responsible for managing the endorsement process

Elected by the SAVE Board of Directors

Reports to the Chair of the Board of the SAVE Board of Directors

Responsible for conducting training and working with the SAVE Advocacy Council

Responsible for staffing the following positions: Questionnaire and Panel Manager, Public Relations Specialist, Endorsement Celebration Manager

Responsible for maintaining process confidentiality and integrity

##### **Questionnaire and Panel Manager**

Reports to Endorsement Committee Chair

Responsible for coordinating all questionnaire correspondence and candidate interviews

Responsible for maintaining process confidentiality and integrity

##### **Endorsement Panel Leader**

Reports to Questionnaire and Panel Manager

Coordinate and communicate with all panel members

Responsible for conducting panel sessions

Responsible for producing endorsement recommendations following the endorsement process and using endorsement appropriate tools (questionnaire and score sheet)

Responsible for maintaining process confidentiality and integrity

### **Endorsement Panelist**

Reports to Endorsement Panel Leader- Commits to participation and attendance

Responsible for upholding confidentiality and conflict of interest policies and approaching each panel decision with an open mind using tools and information provided to determine a recommendation

Responsible for maintaining process confidentiality and integrity