

## **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 who 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 and its scope, structure and purpose are defined by the Endorsement Committee Charter.

Endorsement decisions will have passed through an endorsement panel, the Endorsement Committee, and the Board of Directors. An endorsement cycle shall commence with the issuing of candidate questionnaires and conclude with the SAVE Board of Directors endorsement authorization, endorsement

announcements and events, as well as the final committee debriefing to incorporate any changes for the next election cycle.

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

The endorsement panel is responsible for evaluating each candidate in a particular race and vetting his/her/their candidacy, with the purpose of assisting the Endorsement Committee's endorsement decision. Staff will make best efforts to have at least one (1) SAVE Board Member or one (1) Endorsement Committee member on each panel. For each race, the endorsement panel will 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.

After deliberations, the endorsement panel will vote to determine its recommendation. At the request of any panelist, the voting shall be anonymous. The Panel Leader—or another committee member who participated in the panel—shall convey the panel's recommendation and its reasoning for same to the Endorsement Committee.

At the end of each endorsement cycle, the endorsement committee shall conduct a debriefing session wherein any proposed changes to the process are deliberated and, if so determined, instituted. The committee shall consider the input of panelists, board members, and staff in determining whether to make changes to the process.

## **7. CONFLICTS OF INTEREST**

Members of endorsement panels must sign a conflict of interest form and disclose any and all real or perceived conflicts of interest that member may have for a

candidate or campaign. Committee members and Board members have the same disclosure and recusal obligations as panel members.

If the circumstance arises where there is a question as to whether a panel member, committee member, or board member should recuse based on a real or perceived conflict of interest, then the Endorsement Committee Chair (or if the Chair is the person with the possible conflict or is otherwise unavailable, then the Vice Chair) shall, in his or her discretion, determine whether that person should be recused from participation and discussions in that race. If a panel member, committee member, or board member is recused from being involved in the process for a particular race, he or she shall also be recused from all discussions about that race with panelists, committee members, board members, and staff until a final endorsement has been made.

## 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 and verifiable public records, such as criminal or unethical behavior. Positive or negative voting records on key initiatives are also considered.
- 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 important to a candidate’s ability to become a successful policy maker and is well qualified for the relevant position. However, as noted above, endorsements will go to the most qualified candidate, irrespective of party affiliation, sexual orientation, or gender identity or expression.

## 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/their municipal, county, and/or state election laws;
- b. Complete the SAVE questionnaire;
- c. Attend an interview, either in person, by video teleconference, or telephonically, with the exception of the abridged endorsement process ; **and**
- d. Support SAVE’s policy goals.

## 10. SPECIAL ENDORSEMENT CIRCUMSTANCES

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

**Co-Endorsements** - SAVE strives to endorse a single candidate in every race. In the rare event that more than one candidate is 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 generally will not endorse in primary elections. However, in special circumstances, SAVE reserves the right to endorse in primary elections. With the exception of the re-endorsement of incumbents, an endorsement in a primary election must be made by a 2/3 vote of the Endorsement Committee and ratified by a majority vote of the Board of Directors. 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. If there is a possibility of a run-off, the original endorsement panel may recommend to the Committee an alternate endorsement should the first-choice endorsement not advance to the run-off.

**Re-endorsement of Incumbents for County and State Elections** – In special circumstances, SAVE may utilize an abridged process to re-endorse incumbent candidates running for re-election for county and state offices they currently hold. This process is reserved for candidates who have been exceptional allies while in office and who have a proven track record in fighting for LGBTQ equality. This special endorsement eligibility is not automatic and 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 Application for Re-Endorsement outlining the candidate's support for and record on LGBTQ issues while in office. The Application for Re-Endorsement will be sent to candidates after qualifying has closed. Upon review of the submitted documents, the Endorsement Committee will convene to make its recommendation to the SAVE Board of Directors as to whether re-endorsement of the incumbent is merited. Upon ratification or rejection by the Board of Directors, SAVE Action PAC will notify the candidate(s) of the decision. Incumbents not receiving an endorsement through this abridged process will be afforded the opportunity to

participate in the regular established endorsement process delineated in sections 8, 9 and 11.

**Re-endorsement of Incumbents for Municipal Elections** – In special circumstances, SAVE may utilize an abridged process to re-endorse incumbent candidates running for re-election for offices they currently hold at the municipal level. This process is reserved for candidates who have been exceptional allies while in office, who have a proven track record in fighting for LGBTQ equality, and who have voted, in their current position, overwhelmingly and consistently in accordance with SAVE’s mission and stated policy positions. This special endorsement eligibility is not automatic and will be reviewed by the Endorsement Committee on a case-by-case basis, and must be approved by a 2/3 majority of the Endorsement Committee. All incumbents seeking re-endorsement are required to submit a completed SAVE Action PAC Application for Re-Endorsement outlining the candidate’s support for and record on LGBTQ issues while in office. The Application for Re-Endorsement will be sent to candidates three months prior to election day or upon qualifying, whichever comes first. Upon review of the submitted documents, the Endorsement Committee will convene to make its recommendation to the SAVE Board of Directors as to whether re-endorsement of the incumbent is merited. Upon ratification or rejection to by the Board of Directors, SAVE Action PAC will notify the candidate(s) of the decision. Incumbents not receiving an endorsement through this abridged process will be afforded the opportunity to participate in the regular established endorsement process delineated in sections 8, 9 and 11.

**SAVE Selects:** In extremely rare circumstances, SAVE’s Board of Directors may vote by a 2/3 majority, after seeking the input of the Endorsement Committee, to engage in the SAVE Selects process. A SAVE Selects Candidate is one that is recruited by or engages SAVE very early in the Election cycle in one of two election scenarios: 1.) open seat of strategic importance, and 2.) challenging an anti-LGBTQ incumbent in a seat of strategic importance. Through engaging in the SAVE Selects process SAVE can endorse as early as the candidate’s official announcement. This process is reserved for candidates who will excel at being a champion of LGBTQ issues, maintain a high level of engagement with the organization, and for races

that SAVE plans to devote significant organizational resources. The standard SAVE endorsement process will not occur when the SAVE Selects process is chosen by the board of directors.

If successfully elected, the SAVE Selects candidate can be re-endorsed by a 2/3 majority of the Board upon announcement of subsequent campaigns in three scenarios: 1.) running for re-election for their current seat, 2.) running for election in a new, open seat and is not running against another previously endorsed candidate(s) or incumbent endorsed by SAVE, or 3.) challenging an anti-LGBTQ incumbent.

## **11. ENDORSEMENT OF BALLOT MEASURES AND RETENTION VOTES**

Upon the deadline to qualifying for the ballot, the Endorsement Committee and the Board will be notified of all ballot measures and retention votes appearing on the ballot. Endorsement Committee members, Board members and staff will be invited to “sponsor” any item for discussion to be endorsed or ask that for any race involving a candidate that we send out questionnaires and have an interview. The sponsor’s responsibility will be to represent the issue for the Endorsement Committee’s consideration and make the case that it is within our Mission, policy agenda, and has an impact on the LGBTQ community. The Endorsement Committee will convene, discuss and vote on whether to endorse in the race. If the Endorsement Committee votes to endorse, the Board will be convened to vote to ratify the endorsement or not.

## **12. PANEL DECISION**

Staff will select an endorsement Panel Leader from each panel to provide 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 then immediately following the last interview of all candidates in a particular race in order to deliberate on the endorsement. The members of the panel will individually score, deliberate, and vote. As noted above, the panel voting shall be anonymous if so requested by any panelist.

The panel may vote to:

1. Recommend that SAVE endorse one candidate;
2. Recommend that SAVE not endorse any candidate;
3. Recommend that SAVE co-endorse candidates; or
4. Defer the recommendation to the Endorsement Committee.

The Panel Leader or any other committee member who was also a panelist will convey the results along with additional information about the interviews to the Endorsement Committee.

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.

### **13.AFTER THE ENDORSEMENT**

SAVE staff (preferably the Executive Director) will call the candidate participating in the endorsement process to inform them of the Board of Director's decision and will 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.



## 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

### 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 tolls (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