



SAN DIEGO
DEMOCRATS
for
EQUALITY

Transformation Task Force

Findings and Recommendations

September 2013

Table of Contents

<u>EXECUTIVE SUMMARY</u>	3
<u>CLUB HISTORY</u>	4
<u>TRANSFORMATION TASK FORCE METHODS OF REVIEW</u>	6
<u>MEMBER OUTREACH & INTERVIEWS</u>	7
<u>TRANSFORMATION TASK FORCE RECOMMENDATIONS</u>	9

Executive Summary

At the April 2013 Democrats For Equality Executive Board meeting, the Board decided that a number of changes would be required to keep the Club moving forward in a positive direction. This included developing a platform for change, both within and outside of the Executive Board. A number of actions were taken to advance this change initiative, including changes to the existing Club by-laws and changing the Executive Board election calendar and priorities.

Another initiative launched by the Executive Board was the creation of an independent task force composed of existing Club members who would be charged with reviewing the facilitated work that Alberto Cortes had conducted with the Club and take an in-depth look at how the Club might be restructured over time to facilitate change, bolster membership, increase the Club's community involvement and explore enhancing diversity within the Club's ranks.

Two prior Executive Board members, Vanessa Cosio and Tony Winney, volunteered to serve as co-chairs of the Task Force. In consultation with the Executive Board, qualifications to serve as a Task Force member were developed and outreach was conducted to solicit participation from existing members. Ten members volunteered to spend over 12 hours together over 5 months discussing the Club's past, present and future with the hope that common threads would be revealed and a course of future action might be charted.

The Transformation Task Force was composed of the following members:

Greg Bolian	Vanessa Cosio (Co-chair)
Ashley Harrington	Carla Kirkwood
Johnny Logan	Mark Maestrone
Tim McMullen-Sullivan	Chris Ward
Stephen Whitburn	Anne Wilson
Tony Winney (Co-chair)	

The report developed by the Task Force was presented to the Executive Board of the Democrats for Equality at their September 2013 meeting. Input was solicited from the Board; however, the recommendations of this report remain a largely independent effort to initiate new conversations and help lay the groundwork for a new Executive Board election to be held in early 2014. It will be the purview of that new Executive Board to decide which, if any, of these recommendations will be implemented and an appropriate timetable for implementation in consultation with the General membership.

Club History

The Democrats For Equality have an incredibly rich history and remains one of the oldest active LGBT organizations in the United States. The history of the organization closely mirrors the progression of the national struggle for LGBT rights. It is a history that members are exceedingly proud of and rightly so. The Task Force members firmly believe details of this august history should be weaved into future branding efforts as a way to connect to the past and remind members of their impressive roots. We believe a brief summary of the Club's past also helps inform the discussion of the future of the Club.

The San Diego Democrats for Equality was founded by Bob Lynn in 1975 under the name of the San Diego Democratic Club. At that time, there was a general lack of support within San Diego politics, even among Democrats, for LGBT issues. Bob and other founding members had difficulty finding 30 people willing to put their name to paper to help secure a charter for the Club in fear of being outed. Meetings were held in private homes because politicians and others did not want to be seen in a public place attending a gay club meeting.

The only LGBT organizations in San Diego older than the Democrats for Equality are the San Diego LGBT Center and the San Diego Imperial Court. The Democrats for Equality was one of the few social and political outlets available to LGBT and their allies at the time to help affect change.

In the 1980s, the Club was slowly developing into an emerging force. Club members began using computers to create LGBT voter lists and introduced the first voter information guide to help get LGBT friendly candidates elected to office.

The Freedom Awards were also launched in the early 1980's, with the first one being held at the Prado restaurant in Balboa Park. Protests were held outside the restaurant and attendees had to cross picket lines set up by the Religious Right to enter. This only spurred Club members to redouble their efforts.

The 1980's also brought devastation to the LGBT community in the form of AIDS. Numerous members of the Democrats for Equality lost their lives to the disease, including two prior Club Presidents Brad Truax and Doug Scott. Members became actively involved in Life Lobby, a forerunner to Equality California, which was a federation of local organizations throughout the State that helped lobby for greater awareness of AIDS/HIV issues. The AIDS crisis forced many people to come out of the closet and become more engaged in the fight for LGBT rights and helped increase political mobilization by friends and family of those affected by the disease.

During the 1990s and 2000s, the Democrats for Equality became a more robust organization that began to have a quantifiable impact upon the San Diego political

scene. The number of Executive Board positions began to expand as the Club became involved in more and more initiatives.

The Club had very clear goals and was very successful executing them, which included working diligently to pass a ballot initiative to establish district-based City Council elections in the City of San Diego. The creation of the Third Council District ensured that the LGBT community could use their influence effectively to elect an LGBT friendly candidate and have a voice on the San Diego City Council.

The Club was also very determined to support and elect an openly LGBT candidate for the City Council. Members were crucial to securing the grassroots support and financial support needed to get Christine Kehoe elected to the City Council in 1993, walking precincts and conducting voter outreach.

During this time, the Club continued to become more sophisticated with their implementation of technology to help develop reliable methods to identify likely LGBT households to turn them out to vote.

As the national LGBT movement progressed and matured during the 2000's to the present, the Club became more involved in the regional and statewide Democratic Party politics, sending numerous delegates to represent San Diego's interests on influential boards and commissions. The Club's endorsement became highly sought after by local elected officials, helping elect more LGBT candidates and LGBT friendly candidates to office including Toni Atkins, Todd Gloria, Dave Roberts, and others.

Jess Durfee, a current Democrats for Equality member, became chair of the San Diego Democratic Party from 2004-2013. He also served as chair of the California Statewide LGBT Caucus from 2007-2011 and became the first San Diego member of the Democratic National Committee in 2008. He also served on the national Stonewall Democrats for eleven years. These accomplishments among others from Club members would have been unthinkable a mere 10-20 years prior.

During this stage, the focus of the Club started to drift away from being a grassroots organization and to one where members preferred supporting candidates and issues financially through fundraising events. The Club's primary activities have evolved from organizing and action to a focus on fundraising and advocacy. New initiatives were launched to create a website for the organization and create a Facebook page to better communicate with membership. These efforts proved successful and continue to be two of the primary methods of regular communication. Despite an increased online presence, the Democrats for Equality's membership started to wane. As more and more rights have been secured and the median age of Club members climbed, the Club has been challenged to strike the right chord to successfully recruit and keep new members. It has also been challenging to find members interested in investing their time and energy to fill open seats on the Executive Board and inject new ideas into the discussion.

Current Status of Club

The Democrats for Equality membership roster currently stands at approximately 150. The members that remain are dedicated and most are long-standing members of the Club, fully invested in its mission and engaged. The organizational budget is healthy and is bolstered throughout the year by a number of fundraising events. Most revenue is derived from membership dues, particular those received from the upper tier members. The Freedom Awards and the Big Kitchen Lasagna Dinner are an important social outlet for Club members to remain connected with one another. The Club also maintains a healthy profile at regional fundraising events such as the Eleanor Roosevelt Dinner, Harvey Milk Breakfast and the Center Gala.

A number of efforts have been undertaken by the Executive Board to help facilitate change and streamline the organization in the past year. The Board recently amended the organizational bylaws to reduce the number of Executive Board positions recently and to change the election calendar to enable the Transformation Task Force to complete its work. The paper version of the Club newsletter was recently eliminated to save on mailing and production costs and moved entirely to an electronic format. An effort is now moving forward to update the membership database and ensure the integrity of those records.

The current Executive Board and General membership of the Democrats for Equality have been exemplary stewards of the Democrats of Equality organizational legacy and should be commended for appointing an independent task force to review existing structures and recommending change within the organization. Such processes can often be misconstrued as severing the ties with the past entirely. The Task Force viewed the charge as building upon the strong foundation that has been created by long-time members after years of struggle to obtain rights on the local, state and federal levels and be viewed as equal members within society.

Transformation Task Force Methods of Review

The Transformation Task Force held four meetings over the course of 5 months, for a total of 12 hours, to discuss the past and future of the Democrats For Equality. The Task Force members utilized a listserv to share ideas and continue the conversation between meetings.

One of the sources for information was the report issued by Alberto Cortes April 2013 after discussions with Executive Board members, interviews with stakeholders and a facilitation session with the General Membership at the March

2013 general meeting. The Cortes report served as a touchstone for the Task Force as the group determined the agenda for their meetings and general courses of action. Many of the recommendations put forth in the Cortes report remain pertinent to the conversation and are reinforced by the following recommendations of the Transformation Task Force.

The recommendations outlined within this report were developed by the Transformation Task Force to encourage participation by existing membership and bolstering new membership. Before new members can be brought on board, fundamental changes are necessary to *sustain* participation of all members over time. It is not enough to recruit new members if existing procedures are not in place to channel their energy and match them to volunteer opportunities that appeal to them on a personal level rather than simply meeting the immediate needs of the club.

The question of whether the club remains pertinent to the political conversation after so many new rights have been secured by the LGBT community in recent years was seriously explored by the Task Force. While it is encouraging to see such amazing progress over a relatively short period of time, the Task Force affirmed that the fight is not over and that indeed the Club remains a pivotal political voice for not only the LGBT community, but all those interested in promoting equality through reproductive rights, organized labor, and other local progressive movements.

The fight for equality is a multi-faceted one that does not solely belong to the LGBT community. When strong partnerships are formed with other movements, together we become a stronger web for political mobilization and action. This viewpoint was reinforced by interviews with members of the Club conducted by Task Force members. This cross-pollination between existing political movements also enables the Democrats for Equality to attract members from a wide variety of backgrounds and interests, diversifying membership and enriching political discussions.

Member Outreach & Interviews

In addition to the regularly scheduled meetings, Task Force members were asked to outreach to the General Club Membership to solicit their thoughts and ideas on their individual priorities. Task Force members met personally with a number of Club members while other Club members emailed us their opinions. These communications were then shared and discussed at the beginning of each Task Force meeting.

Opinions covered a wide range of topics, but primary focused on what members believed to have been successful or not so successful aspects of the Club in the past. These comments helped inform the discussion of the Task Force and revealed where

schisms had taken place over the years, mostly surrounding issues such as early endorsements and friendly incumbent endorsements. These comments revealed how important the endorsement process is to many Club members as a core function, and the possible need for amendment of the process.

Another theme consistently emerged from interviews and Task Force discussions and concerned Club identity: is the Democrats For Equality first and foremost a Democratic club or an LGBT club? This question is a fundamental one that has been discussed repeatedly and was also debated by the Task Force members. It manifests itself in discussions of which candidates to support and endorse when positions on issues are similar: the LGBT candidate or the straight ally? It also becomes pertinent when contemplating which regional organizations the Club might like to hold joint events with and which communities are currently underrepresented in the Club membership.

As previously mentioned, the genesis of the Club was to counter outright discrimination for the LGBT community in the San Diego region. The Club has been extremely successful in this regard. However, it is the opinion of the Task Force that first and foremost, the Democrats For Equality is a Democratic club, chartered primarily by members of the LGBT community. It will be crucial for the Club to expand outreach to straight allies and minority communities in San Diego to thereby expand future membership. It is also an important distinction to Generation Y, whose membership ranks we hope to increase. Generation Y tends not to adhere to long-standing lines of arbitrary identification solely based upon sexual preference due to the changing nature of sexual politics and identity in the US. This question of identity will continue well into the future as the Club navigates the changing social and political landscape and seeks to adapt.

Finally, we thought it important to note that the demographics of San Diego County will continue to change drastically over the next 10-20 year, and demographics is destiny. The future face of the Democrats For Equality will look very different from the present one. According to SANDAG's 2050 Regional Growth Forecast, San Diego's Hispanic population is expected to double during that period, meaning that 60% of the city's overall population increase of 645,567 people will be accounted for by the increase in the Hispanic population. The city's white population, by comparison, effectively stops growing by 2015, and actually starts decreasing in size in 2035. Expanded outreach to the Latino community and its community organizations, and developing a true understanding of how issues of inequality affect this population will be critical to the Democrats For Equality remaining relevant.

In addition to the rapid growth of the Latino population, San Diego will continue to gray over the next 20 years with San Diego County's senior population almost doubling during that time period. This will change the face of the gay community, as members age and they are forced to fight for new rights such as equal access to healthcare, access to a range of transportation options, age-appropriate housing,

food security for those with limited incomes and more. The Democrats For Equality must continue to embrace these members and help fight for their rights in partnership with other progressive community groups that want to assist senior residents face the challenges of aging and help them remain independent and engaged in the gay community for as long as possible. It will also be critical for the Democrats For Equality to partner with the Lambda Archives and others to ensure that we enshrine the knowledge of our past fights for equality and memorialize the contributions of those who have helped secure the rights that we enjoy today.

Transformation Task Force Recommendations

The follow is a list of eleven priority recommendations developed by the Transformation Task Force. Much consideration went into developing recommendations that were specific, measurable, attainable, realistic and timely. The Task Force recognizes that the Democrats for Equality remains a volunteer organization without a paid staff, so the recommendations can be implemented over time by Executive Board members and General Membership as they see fit and as time allows. We hope that this report will serve as a guide for future Executive Boards to revisit and reprioritize over time to best serve the changing needs of the Club and its membership.

Recommendations

1. Mission Statement/Club Identity

- a. Revise current mission statement to recognize the following:
 - i. Expansion of the term “equality”
 - ii. Reflect that we are no longer only FIGHTERS but also now DEFENDERS of equal rights
 - iii. Include our collective struggles for social justice
 - iv. Acknowledge our role and responsibility for providing leadership to a wide-range of progressive issues within our region
 - v. Recommended Revised Mission Statement:
Mission Statement: San Diego Democrats for Equality is a progressive democratic LGBT and Allies San Diego-based organization that aims to unify and organize all those interested in supporting and furthering progressive democratic values guaranteed to all Americans regardless of sexual orientation, gender identity, race, class, ethnicity, religious affiliation, or age.

Description: San Diego Democrats for Equality is a an organization that implements its mission and platform through: * supporting quality Democratic candidates for every appointed and elected

position at local, state and national level; * advancing public policies for enduring social change; * developing and disseminating ideas to promote fairness and democracy; * forging concrete connections with other community organizations which foster progressive ideals; and * mentoring progressive advocates to fight for social justice.

2. Leadership Transition Plan – “Leadership Ladder”

Leadership can come in many forms, not just those who might enjoy serving in an elected capacity on the Executive Board. It is crucial to increase the variety of volunteer opportunities available to help spread the work load and help match budding leaders and their skill sets to the needs of the Club.

- a. Create a leadership transition plan – “Leadership Ladder” which identifies those members that might be interested in serving in a variety of capacities.
 - i. Provide more avenues for members interested in leadership roles. This includes committees, event planning, Executive Board, etc.
 - ii. Provide training to new Executive Board members and Committee chairs
 - iii. Leadership outreach and cultivation should be continued throughout the year, not only during board elections, to ensure membership is aware of upcoming opportunities to participate.

3. Annual Political/Strategic and Operational Plans

Development of annual goals may seem daunting, but the goals can be succinct and limited in scope and number to provide focus throughout the year.

- a. Develop specific annual goals tied to day-to-day operational activities and political/strategic activities. These plans will be developed at the beginning of the term of each Executive Board, in consultation with the General membership, and revisited annually.
- b. “Day-to-Day” Operational Plan
 - i. Example: Storage fees, maintenance fees, annual fees, filings, etc
- c. Political/Strategic Plan
 - i. Create an annual strategic political plan consisting of 3 strategic political goals that will drive all Club activities throughout the year. Limit the number of political/strategic goals to no more than 5 in order to provide laser-like focus for the Club.
 - ii. Sample goals: Develop political visibility for transgender community by 2015; Increase reach of voter guide by 10%

4. Formation of Committees

Committees should form the backbone of the Democrats for Equality, helping develop new leaders, inform membership and inject new ideas into the conversation.

- a. Committees should be formed to carry out action items and decisions made by the Executive Board. This will help ensure wider participation of general members and will help better match volunteer opportunities to the skills and interests of members.
- b. Membership responsibilities will fall to a minimum 3-person committee due to their importance of developing new Club members and to help inject new ideas.
- c. Recommended committees:
 - i. Fundraising/Development – reports to VP of Development
 - ii. Membership – reports to VP of Development
 - iii. Marketing/Communications – reports to President
 - iv. Endorsements – reports to VP of Political Action
- d. Each Committee should provide a report to the General Membership at every meeting to help inform membership and to help openly recruit new members to those Committees on an ongoing basis.

5. Planning Process for Voter Guide

As previously stated, the Voter Guide remains one of the most important tools the Democrats for Equality have to help influence elections and promote endorsed candidates. The Task Force recommends the Guide receive special attention to ensure that it continues to evolve and remains a quality method of outreach.

- a. Create a plan for designing, mailing and electronic distribution of the Voter Guide during election years
- b. Establish specific goals for reach/distribution including # mailed, # emailed, # downloaded/viewed
- c. Create impact report after election day measuring voter impact and endorsement impact
- d. Sustain voter lists for future elections

6. Annual Budget

It is important that the full financial picture of the Club is shared with not only the Executive Board but with the General membership on a regular basis to help inform decisions and planning efforts. It will also help remind all members of the importance of fundraising to the health and vitality of the Club.

- a. Treasurer will fulfill duties as outlined in bylaws
- b. Annual and monthly financial reporting will be provided for transparency at Executive Board meetings and to General membership via electronic newsletter

- c. Treasurer will provide a brief, written monthly budget report at Executive Board meetings showing income, expenses, assets and liabilities. A modified version of this statement should appear quarterly in the electronic newsletter.

7. Executive Board Positions

It is recommended that the number of Executive Board positions be reduced to promote efficient organization and to help decentralize decision-making and funnel it to Board authorized Committees.

- a. The Executive Board should consist of 5 vital positions to help decentralize decision making and power to the Committee structure to empower the general membership
 - i. President
 - ii. VP of Political Action
 - iii. VP of Resource Development
 - iv. Secretary
 - v. Treasurer
- b. Board elections should be moved to the spring of each year to reduce conflicts with the holidays and hopefully attract more volunteers interested in running.
- c. Possibly stagger Exec. Board position elections so as to avoid a full turnover of the Board all at once.

8. Executive Board Policies

- a. Executive Board will be responsible for governance, budget, oversight and preservation of data, data analysis, and annual reporting
- b. Executive Board will be tasked with leading implementation of the Recommendations from the Transformation Task Force Report.
- c. Council of Clubs and Other Regional Democratic Organizational Partnerships
 - i. Communicate with General membership the activities and goals of the Council of Clubs, the Democratic Central Committee and other important regional Democratic groups on a regular basis
 - ii. Partner with other Democratic clubs whenever possible to help promote attendance at Democrats for Equality events
- d. Reports
 - i. Begin with report of 2012
 - ii. Annual report will be created and shared with membership to reflect work of club for each year
- e. Archival process
 - i. Creation of responsible archival process for board documents, minutes, and other core documents as decided by the Board

- f. Fundraising
 - i. Develop fundraising strategy/plan to allow multiple channels for raising funds; membership dues should be one of these channels but not ONLY channel

9. Membership

- g. Recommendation of creating a committee to sustain needs of membership development
- h. Increase membership diversity with greater representation from all groups but especially youth, transgender, people of color communities, ally communities.
- i. Hold joint events with area progressive organizations to help bolster membership and increase visibility and interest in the Club.
- j. Revise membership structure including:
 - i. Membership levels
 - ii. Membership dues
 - iii. Membership benefits

10. Endorsements/Advocacy

- k. Recommend creating a committee to coordinate the endorsement process.
- l. The following items are recommendations to explore:
 - i. Review the endorsement schedule. Recommend not tying the schedule to the election cycle.
 - 1. Incumbent endorsements should not supersede development of new candidates who may be viable if given enough time to campaign.
 - ii. Invite Elected officials to Executive Board and/or General membership meetings after endorsement and election to ensure they are reporting back to the Club on their progress on Club goals.
 - iii. Promote and endorse initiatives as well as candidates.
 - iv. Revise the friendly incumbent process to be more transparent. Educate membership as to the purpose and timing of friendly incumbent endorsements.
 - v. Have the Endorsements Committee review the candidate questionnaire on an annual basis and recommend changes to the Executive Board and General membership. Publish/distribute completed questionnaires before candidates receive endorsements.
 - vi. Revise forum structure
 - vii. Two-way process for candidate

1. Provide education for candidates

11. Communications/Marketing

- m. Recommendation of creating committee to sustain needs of communications/marketing
- n. Develop communications strategy to maximize all media channels
 - i. Email
 - ii. Website
 - iii. Social media: Facebook, Twitter, YouTube, etc.
 - iv. Mail
 - v. Phone
- o. Officially establish brand of Democrats for Equality (DFE? SDDE? Other?)
- p. Ensure all materials and invitations are sent to other clubs and communities
- q. Committee should create communications plan