



*Stand Up. Take Action. Vote.*

## **National Endorsement Policy 2018**

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# 1 General Information

## A PDA's Goal

PDA's goal is to ultimately elect a permanent progressive majority to Congress in both House and Senate. We hold Endorsement Meetings for Democratic Candidates only.

## B PDA's Structure

PDA is a Federal Political Action Committee, and endorses Candidates for federal office only. This Endorsement Policy must be used in every case to endorse Candidates.

## C Endorsement Stages

Our PDA Endorsements are done in two stages:

1. First Stage Endorsement – at Chapter or State level. If a Candidate achieves a First Stage Endorsement, he/she is automatically eligible to be considered for National Campaign Focus.
2. Second Stage - Elevation to National Campaign Focus

Consideration for National Campaign Focus is performed independently for Primary and General Elections. However, the First Stage Endorsement done for the Primary Election is not repeated.

## D Endorsements

Endorsements are done exclusively by these three Endorsing Groups (EG's):

- ) Chapter or CD – for House Candidates only
- ) States – for Senate Candidates only
- ) Once completed, Endorsements may be elevated to PDA Field for referral to the Leadership Subcommittee for recommendation to the Winslow Group for final decision whether the Candidate shall receive the National Campaign Focus.

We suggest, but do not require, Chapter/CD's and States to encourage all Democrats seeking Primary Election in a given race to participate in the Endorsement Process. To that end, we suggest that these EG's send the Candidate Cover Letter and Questionnaire to all such Candidates.

Endorsing Groups must follow the procedures outlined below for consideration of a Candidate by the PDA Leadership Group for National Campaign Focus. They must use the national questionnaire in full, but may develop additional endorsement questions which reflect the challenges and needs of that Endorsing Group.

For optimum effect, and to avoid omitting the most progressive candidate in a given race, Endorsement Meetings should be held some weeks after the filing deadline of the state where the endorsement will take place. It is recommended that Endorsement Meetings take place reasonably promptly after that time. However, all Endorsement Meetings must be held no later than 45 calendar days prior to the General Election.

#### E First Stage Endorsements - Benefits to the Campaign

##### 1. Chapter/CD

Chapter/CD – Posting on PDA’s National website, chapter email with description of the candidacy, and links to the Candidate’s Home and Donate pages, local social media alerts, local press release if desired (prepared by the chapter), and chapter support (which may include office assistance, local phone banking, precinct walking and other support) to the full extent allowable by FEC rules.

##### 2. State

State – Posting on PDA’s National Website, statewide email with description of the candidacy, and links to the Candidate’s Home and Donate pages, social media alerts, press release if desired (prepared by state leadership), and chapter support as practicable and to the full extent allowable by FEC rules.

#### F. National Focus - Benefits to the Campaign

##### 1. If a Candidate achieves a First Stage Endorsement, he/she is eligible to be considered for National Campaign Focus.

PDA brings critical resources to a campaign chosen for National Focus. The campaign will enjoy one or more nationwide email(s) about the candidacy, one national fundraising ask to the membership, a member of the national team will visit the campaign, national social media, national press release if desired (prepared by PDA national staff). Finally, our national Phone Team can make hundreds - or thousands - of calls into the District for the Candidate.

A Candidate who has achieved the National Campaign Focus and won at the Primary Level is then eligible to be considered for National Campaign focus in the General Election. Conduct indicating a change in progressive stances, as well as factors relating to competitiveness in that race will affect the eventual list of Candidates receiving General Election National Campaign Focus.

#### H PDA Voting Eligibility Requirements

In order to vote in any Endorsement Meeting, a person must have been in the PDA national database for a minimum of 90 days. (See Chapter/CD Endorsement Procedures for further requirements.)

## I Other Endorsements

1. Automatic Endorsement - Only Congressional members of our National Advisory Board and Senator Bernie Sanders are automatically endorsed, because of their demonstrated loyalty to the principles and legislation PDA espouses.
2. Expedited re-endorsement of previously endorsed Incumbents  
Previously endorsed incumbents are not automatically re-endorsed. The voting records of these Candidates for reelection will be reviewed by the Leadership Subcommittee prior to re-endorsement.
3. Executive Director's Endorsement – one House endorsement may be made by the Executive Director of PDA, in coordination with PDA Staff. This endorsement must be held back until September 2018. Its purpose is to include a stand-out progressive candidate who has escaped notice, and merits special consideration because of the exemplary positions that candidate has taken, and has won his/her Primary.

## J Notice to PDA Field

In order to advance a Candidate for a National Campaign Focus, the Endorsing Group must submit to [Field@pdamerica.org](mailto:Field@pdamerica.org) a copy of the completed Candidate questionnaire, a report on the Endorsement Meeting which includes where, when, who, what, and the results of the balloting, along with the Candidate's voting record link (as applicable), a photograph of the Candidate, and other pertinent information, within 5 calendar days following the Endorsement Meeting.

## K. Endorsement Policy is Mandatory

This Endorsement Policy must be adhered to in every respect in order to achieve a National PDA Focus position.

## 2 State Endorsement Procedure

### A. All State Endorsements are conducted by Teleconference

All State endorsement votes are done via email and online balloting, and are initiated by the State Leadership Team or the National Team if no State Leadership Team is in place.

### B. The Endorsement Meeting

The EG shall set a date and time for the Endorsement Meeting (via teleconference) of the state membership with the Senate Candidate(s).

C. Notice to State Membership

First Notice of the Endorsement Meeting shall be sent to [field@pdamerica.org](mailto:field@pdamerica.org) and the state membership via email sent through the PDA national system no later than 14 days prior to Endorsement Meeting, advising of the upcoming teleconference and to alert the members that the Candidate Questionnaire will be forthcoming.

Second Notice of the Endorsement Meeting shall be sent no later than 7 calendar days prior to the meeting via email sent through the PDA National system and shall contain the link to the completed Candidate Questionnaire(s) and, where applicable, the Candidate(s)' current voting record(s). It shall also display the link to the email survey for voting.

D. Voting Deadline and Result

The survey shall remain open until midnight Eastern time, of the 4th calendar day after the Endorsement Meeting. 60% of the vote must be achieved by a Candidate for the endorsement to proceed to National Focus.

E. Eligible Voters

In order to be eligible to vote in a State Endorsement Meeting, a person must be a resident of the state and have been in PDA national database for a minimum of 90 days

F. Notifying the Candidate(s)

The Candidate(s) shall be sent the Candidate Cover Letter and Candidate Questionnaire, as well as Candidate Requirements and a copy of This Section no later than 21 calendar days prior to the Endorsement Meeting. The Candidate Questionnaire and link to the Candidate's voting record (if applicable) must be returned to the EG no later than 5 p.m. local time 11 calendar days prior to the Endorsement Meeting. Candidates who do not respond within the required time are not eligible for endorsement.

G. Notice to PDA Field

In order to advance the Candidate for National Focus, the State Leadership must submit to [Field@pdamerica.org](mailto:Field@pdamerica.org) a copy of the completed Candidate questionnaire, a report on the Endorsement Vote results, along with the Candidate's voting record link (as applicable), a photograph of the Candidate, and other pertinent information, within 5 calendar days following close of the vote.

### 3 Chapter/CD Endorsement Procedure

A. PDA Chapter/CD Requirements

1. In order to hold an Endorsement Vote, a Chapter or CD must:

- a. Be an established (PDA recognized) Chapter for no less than three (3) months on the PDA national website, or
- b. A Congressional District wherein no Chapter exists
- c. Whether a Chapter or CD, have a minimum of 15 eligible voting members in the Congressional District (CD) in which the endorsement is sought.
- d. Participate in PDA fundraising appropriate to the socio-economic conditions where the Chapter/CD is located

#### B. Types of Chapter/CD/CD Configurations

1. A Chapter may serve a single CD exclusively. In this case, the Chapter has a single Endorsement Meeting for that congressional race, and the results of that Chapter's vote will determine the endorsement.
2. Some Chapters serve more than one CD. That Chapter may have as many Endorsement Meetings as CD's it serves, provided that each CD for which it holds a meeting qualifies pursuant to Chapter Requirements Section 1 c.
3. Some Chapters serve only part of a CD, with one or more adjoining Chapters also serving that CD. It is required that those Chapters hold a joint Endorsement Meeting to decide the endorsement.

#### C. Eligible Voters

In order to be eligible to vote in a Chapter/CD Endorsement Meeting, a person must be:

- ) A member in good standing of PDA at the national level (in the national database) for a minimum of 90 days,
- ) A member in good standing of a PDA Chapter as that applies, for a minimum of 90 days. A "member in good standing" means that the individual has attended at least two meetings previous to the Endorsement Meeting and meets other reasonable requirements the Chapter may set.

#### D. Notifying the Candidate(s)

The Candidate(s) shall be sent the Candidate Cover Letter and Candidate Questionnaire, as well as Candidate Requirements and a copy of This Section no later than 21 calendar days prior to the Endorsement Meeting. The Candidate Questionnaire and link to the Candidate's voting record (if applicable) must be returned to the EG no later than 5 p.m. local time 11 calendar days prior to the Endorsement Meeting. Candidates who do not respond within the required time are not eligible for endorsement.

#### E. Meeting Notice - Chapter/CDs

1. First Notice of the Endorsement Meeting shall be sent to [field@pdamerica.org](mailto:field@pdamerica.org) and the Chapter/CD membership via email sent through the PDA national system no later than 14 days prior to Endorsement Meeting, advising of the date, time and place of the Endorsement Meeting, and to alert the members that the Candidate Questionnaire will be forthcoming.

Second Notice of the Endorsement Meeting shall be sent no later than 7 calendar days prior to the meeting via email sent through the PDA National system and shall contain the link to the completed Candidate Questionnaire(s) and, where applicable, the Candidate(s)' current voting record(s). It shall also display the link to the email survey for voting.

Failure to notify all eligible members may result in PDA National voiding the process and could result in failure to obtain National Campaign Focus.

#### F. Chapter/CD Endorsement Meeting Procedures

Chapters/CD's may elect to use the Endorsement Procedures (teleconference with online balloting) as outlined in the State procedure. In that case, the procedures outlined in Section 2 must be followed in every respect.

In-person Endorsement Meeting procedures are outlined below:

##### 1 General

- ) Candidates, Chapter/CDs, members, must meet eligibility requirements
- ) PDA Endorsing Groups reserve the right to endorse no Candidate
- ) Campaign materials may not be in evidence prior to the balloting.
- ) Each Candidate or designee should bring to the meeting an appropriate number of copies of the completed questionnaire for endorsement.

##### 2 Meeting Format

- ) A neutral person, if available, shall be selected to moderate the meeting
- ) Each Candidate shall be given an equal amount of time to speak. The moderator may ask clarifying questions.
- ) A formal Q&A by audience members will follow Candidate presentations.

##### 3 Voting

- ) Balloting will occur only following the presentations and Q&A by Candidates or their representatives and shall follow these balloting procedures:
  - ) a. One Candidate -- In cases where only one Democratic Party Candidate is seeking an endorsement, the qualified PDA members in attendance will vote "yes" or "no" on the question of endorsement, and a 60% majority will decide the question.
  - ) b. Two Candidates -- In cases where two Candidates are seeking endorsement for the same office, the ballot will offer a choice between the two Candidates and "none of the above." A Candidate receiving 60% of the votes of qualified members in attendance shall receive the endorsement. More than one ballot may be required to achieve 60%.
  - ) c. Three or More Candidates -- In situations where three or more Candidates are being considered for endorsement for the same office the meeting shall utilize the "Instant Run Off Voting" method of election to decide the question. Eligible members in attendance shall rank the Candidates and the "none of the above" option in their order of preference on the ballot. In the event no Candidate receives a majority of the "first

choice" votes, the Candidate or selection with the least votes is eliminated and the second choices of those who chose the eliminated Candidate shall be added to the total votes received by the remaining Candidates. This procedure will be repeated until a Candidate, or the "none of the above" option, has achieved a 2/3 majority, at which time the endorsement by the Chapter/CD(s) shall have been determined.

#### 4 Post Voting/Counting the Ballots

- a. The ballots shall be counted publicly by a team and the votes logged by hashmark on a board visible to all.
- b. The moderator shall announce the results of the balloting in percentages of total ballots cast before the meeting adjourns.
- c. These results may be posted to the Chapter/CD's Facebook page or PDA national's website, or both.

#### G. Notice to PDA Field

In order to advance the Candidate for a National Campaign Focus, the Chapter/CD Leadership must submit to [Field@pdamerica.org](mailto:Field@pdamerica.org) a copy of the completed Candidate questionnaire, a report on the Endorsement Meeting which includes where, when, who, what, and the results of the balloting, along with the Candidate's voting record link (as applicable), a photograph of the Candidate, and other pertinent information, within 5 calendar days following the Endorsement Meeting.

## 4 National Focus Procedure

### A Obtaining National Focus

The process for a candidate obtaining a National Focus begins at the Chapter/CD for House races, or State level for Senate races, and is governed by this policy. It is at the

discretion of the Chapter/CD/State leadership whether to request consideration for National Focus.

When the EG has notified [Field@pdamerica.org](mailto:Field@pdamerica.org) of a successful First Stage Endorsement, pursuant to that EG's Section, the Candidate is eligible for consideration for National Campaign Focus.

If that Focus is desired for the State Primary, request for that Focus must be received no later than 60 calendar days prior to the Primary Election.

Endorsing Groups seeking a National Campaign Focus for a Candidate in the General Election on Tuesday November 6, 2018 must submit the endorsement documents (Section 1 Part I) to [Field@pdamerica.org](mailto:Field@pdamerica.org) no later than 14 calendar days after the Primary Election (whether or not the result of that election has been determined), except for any state where the Primary falls during the latter part of August 2018. The deadline for submission after such Primary is Friday, September 7, 2018.

The National Campaign Focus is also a Two Stage Process:

First Stage:

PDA national has established a PDA Leadership Subcommittee to review and vet all Endorsements. The purpose is to further inform the PDA Winslow Group about the viability of the Campaign. This subcommittee is geographically diverse to ensure broad representation.

The members are:

Steve Cobble - Political Director, DC based  
Donna Smith – ED - Conor Boylan – Midwest focus  
Judy Hess - Endorsement Policy lead and West Coast  
Randy Shannon - IOT, Rustbelt  
Mike Fox - Phones, South

Campaign factors considered by the Subcommittee include:

- Ñ The Candidate has satisfactorily responded to the questionnaire with the vast majority of responses demonstrating serious commitment to PDA principles,
- Ñ The campaign is FEC compliant
- Ñ Has a detailed and viable plan
- Ñ Has an organized campaign staff in place
- Ñ Demonstrates, within reason, the capacity to raise the necessary capital to fund the campaign
- Ñ Demonstrates grassroots support

Once the Subcommittee has vetted the Candidate to determine viability of the Campaign, the Subcommittee will notify PDA Field that the Candidate is qualified for consideration by the PDA Winslow Group.

Second Stage (Primary Level):

The PDA Winslow Group shall vote on whether the Candidate in question shall be awarded National Campaign Focus. This vote shall take place during the regularly scheduled Winslow Group calls.

5 days prior to the Winslow Group call, the Candidate's Questionnaire and voting record, if applicable, shall be sent to the Winslow Group with notice that a National Focus vote on that Candidate shall be held on the call.

60% of those voting must vote yes for the National Campaign Focus to be awarded.

When voting is closed and the result has been determined, the Subcommittee will notify the Campaign and the EG, of the result. If the vote resulted in a successful National Campaign Focus, the Subcommittee will meet to allocate resources to the Campaign relative to other National Campaign Focus Candidates.

If the National Campaign Focus is achieved, a national email blast will be sent to notify our grassroots members that a progressive Candidate is seeking the office and provides them with the Candidate background and an opportunity to volunteer to assist the Campaign.

#### Primary vs General Election National Campaign Focus

Some Candidates achieve National Campaign Focus prior to their state primaries. If a Focus Candidate wins the Primary, then that Candidate is eligible to be considered for National Campaign Focus through the General Election.

Other Candidates who did not apply for a First Stage Endorsement, or did apply and received a First Stage Endorsement but were not awarded National Campaign Focus, and have won their primaries, are eligible to be considered for National Campaign Focus in the General Election.

A Candidate who did not apply for a First Stage Endorsement but won the Primary, must apply after the Primary, and win the First Stage Endorsement pursuant to Section I to be eligible for consideration of National Campaign Focus in the General Election.

All Candidates who are eligible for National Campaign Focus at the General Election Level will be considered by the PDA Leadership Subcommittee and the Subcommittee's Recommendations made to the Winslow Group no later than September 14, 2018 and each voted upon by the Winslow Group, on the September Winslow Group call.