

Escondido Democratic Club

Escondido Democratic Club (EDC) Annual Plan

Submitted
in fulfillment of
EDC By-Laws dated 23 Jun 2007
and
Approved by the General Membership 16 Jan 2010

2010 Annual Plan



January 1, 2010

Paul P. McNamara

President EDC



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1 Guiding Principles

1.1 *Mission*

The Escondido Democratic Club provides opportunities for active political participation for members of the California Democratic Party in the Greater Escondido area. We unite in order to promote democratic principles, issues and candidates thereby contributing to the democratic process in America.

1.2 *Values*

Each of us is equal and deserves protection under the law and the freedom to live life striving to obtain our full human potential. Diversity is strength and a cause for celebration – not a reason to be divided. We hold that through inclusion, tolerance and understanding the American promise can be realized.

1.3 *Vision*

America will progress to become even better than its glorious past. The future belongs to those that can see it and are willing to work for it. The Democratic Party in Escondido will become a viable force for change. The EDC club will be part of the fulfillment of the promise of America through the execution of its foundation tenets.

1.4 *Foundation Tenets*

- To educate our members
- To support Democratic candidates
- To advocate on behalf of important issues
- To encourage participation in self government
- And to have fun doing it!



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2 EDC Annual Goals

2.1 *President's Message*

"Continuing the work of the past for a better tomorrow"

Fellow EDC Democrats,

First, I would like to say how honored I am to be your President for this year. I look forward to a productive and rewarding year working with all of you on the goals of this year's plan.

As a first step, this year's Board reviewed the past Board's efforts and club goals and concluded that we are on the right track but still more work needs to be done if we are to make the EDC a more impactful and meaningful club. To that end, this year's Board held numerous discussions regarding our next steps and we concluded that while political action is our main effort, we need a stronger engine to support it. That engine as we know is membership. So this year will have a special focus on membership.

This year is also an election year. So we have the additional challenge to work diligently for the democratic candidates and at the same time find a way to increase the voice of the EDC. We have spent a lot of time thinking through how to accomplish these complementary but different objectives. We believe we have a good strategy in place that will increase the engine of the club without sacrificing our political action goals.

The election year efforts are also a continuation of the establishment of a two-year cycle based on the elections. This cycle was started last year, where one year is the preparation year and the other is the action year. One of the reasons for the annual plan is to recognize this repeatable pattern and ensure we have the correct goals for each season of the cycle.

For this year, encouraged by our past performance and the results of the 2008 election, we set some very challenging but worthwhile goals. Some of them are the necessary refinements that all organizations need, others reflect the political and economic challenges of our time, and finally others reflect innovative approaches to enhance and expand the club's guiding principles. Each Board member lists below several specific goals in their area of responsibility and then provides a plan for the execution of those goals.

Each Board member has spent a lot of time working on not only the "what" but the "how" for our goals in a resource restricted environment. To realize these goals we will need the help of many of our present members and our future members who have yet to find a place where their voice is heard. I would encourage all of you to commit to doing one more thing for the club this year. Together we can make our home and by extension our country a better place to live.

Wishing us all a very successful year!!

Sincerely,

Paul



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2.2 *Approved Goals*

The following goals were approved for the FY 2010 Annual Plan:

Political Action Goals

- Improve the level of activism of Club members.
- Identify and recruit Democratic candidates for the 2010 election with a focus on Escondido offices.
- Increase EDC collaboration with Democratic Party organizations and other organizations sharing like goals in North County.

Membership Goals

- To be the largest, most diverse, and most impactful Democratic Club in North County.

Communication Goals

- To position EDC as THE option for effective progressive activism in the Escondido area.
- To increase the effectiveness of our communications media in support of branding, increasing membership and encouraging member involvement.
- To enhance the effectiveness of EDC identity elements.
- Develop a Progressive Activism Brand for EDC.

Secretary Goals

- Conduct a review of, and establish where necessary, the Secretary processes, and supporting documents to ensure good processes are in place, records are accurately kept and supporting/governing documents e.g. By-Laws support the actions of the club.

Treasurer Goals

- Close the “books” (G/L) for 2009.
- Develop a Budget for 2010.
- Maintain the General Ledger for 2010.
- Replace the current Excel-based accounting system with an inexpensive, standard financial application.
- With the Board’s direction and involvement, facilitate the development and execution of a fund raising strategy for the Club



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3 Political Action Plan

3.1 General

The Political Action Goals for 2010 are intended to build upon the achievements of the past and to advance similar goals with a focus on community issues and concerns. At the heart of this mission is the election of candidates who will promote the principles and values of its members, and the advocacy of those issues that are important to us as Democrats. For 2010 the following issues were determined to be priorities for the EDC:

1. Health Care
 - a. Education
 - b. State Programs-Single Payer
2. Economy
 - a. Green Jobs
 - b. Good Jobs
 - c. Local Jobs
 - d. Employee Free Choice
3. Environment and Growth
 - a. City Planning
 - b. Water/Waste Water
 - c. Development
 - d. Prop S
4. Immigration
 - a. Federal Policy
 - b. Local Issues
5. Good Government
 - a. Education
 - b. Local Issues
 - c. State Propositions
 - d. National Priorities

Priority issues are distinct from Goals. Priority issues will drive the Speaker Program conducted after the General Membership meeting. The following is a short comparison between a club goal and priority:

•Priority

- Issue of importance to club membership – e.g. health care.
- Issue at a minimum requires education – e.g. speaker program topic.
- Issue that may or may not have Club action-e.g. prop s.

•Goal

- Actionable e.g. increase membership
- Defined e.g. increase demographics of membership
- Measurable e.g. countable numbers
- Plan of Action e.g. conduct a recruitment event

3.2 Goal: Improve the level of activism of Club members.

Objective: To have the membership of the club, participate more fully in the achievement of the club's



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political action goals.

Strategy: EDC will have a multi-pronged approach to this objective – Awareness through Education, Political Action Training, Increased Participation through Community Involvement, and Candidate support activities

Tactics:

- Awareness: Inform and Educate the membership on important issues that affect the community.
By using:
 - Relevant Speaker series
 - Informative website
 - Current and robust email update strategy
 - Phone tree
 - Candidate Forums

In this manner the membership will be not only aware of the issue but what actions can be taken to impact the outcome of the issue. In addition, they will be aware of the current slate for elected positions and the stance of the candidates.

- Training: Maintain a strong a connection with the GO Team infrastructure and leverage that proven strategy for execution of EDC goals.
- Community Involvement: Identify worthwhile activities and provide engagement opportunities to the membership.
- Candidate Support Activities: Maintain and active relationship with Democratic Candidates and keep the membership informed of support activities.
- Infrastructure: Develop a supporting infrastructure that responds to issues and goals of the EDC plan, and capitalizes on the existing GO team processes.

3.3 Goal: Identify, recruit and elect Democratic candidates for the 2010 election with a focus on Escondido offices.

Objective: To have the Escondido Democratic Club actions result in an election slate with Democratic Candidates and an election result with more Democrats.

Strategy: Form an EDC club committee that develops and executes a viable plan capitalizing on the work of the County Recruitment and Endorsement Committee. This committee would also serve as a resource for candidates seeking office ranging from inexperienced to seasoned.

Tactics:

- Form a club committee
- Coordinate with County Committee
- Develop a Plan
 - Identify all elected positions relevant to the EDC membership
 - Develop a vetting process in consonance with EDC priorities.
 - Identify potential candidates
 - Vet potential candidates
 - Propose EDC support and engagement strategies
- Execute the Plan



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3.4 Goal: Increase EDC collaboration with Democratic Party organizations and other organizations sharing like goals in North County.

Objective: Through multiple organization collaboration enhance the Democratic Party influence and voice in North County politics.

Strategy: Coordinate the participation and actions of like-minded organizations on specific issues that affect North County.

Tactics:

- Form a committee
- Identify noteworthy Political Action Items consonant with the general goals of the club.
- Develop a collaboration strategy
 - Includes relevant organizations
 - Contact plan
 - Meeting strategy
 - Media strategy
- Develop a plan of action for each issue.
- Execute the plan.



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4 Membership Plan

4.1 General: The membership of the EDC should reflect the regional population in diversity. It should also reflect a representative number of the registered Democrats in the EDC sphere of influence which is approximately 15,000 voters. The membership should be sufficient to man committees in all 73 precincts. In order to achieve this objective a membership drive committee will be established who will report to the VP of Membership.

4.2 Goal: To be the largest, most diverse, and most impactful Democratic Club in North County.

Objective:

To display a strong Democratic presence in North County by better representing the ethnic and generational diversity of the City of Escondido, and making positive impact on the agenda of the Democratic Party.

Strategy:

Acquisition

- Conduct outreach to friendly organizations.
- Engage existing and potential Democratic voters.

Retention

- Encourage a positive social atmosphere for EDC members.
- Incorporate morale boosting activities into normal club business.

Renewal

- Efficiently manage the intake of new members.
- Clean up existing member information.

Tactics:

- Create a list of friendly organizations.
- Draft and implement a “dual-membership” model for Young Dem’s.
- Data mine lists of Democratic voters.
- Create an annual awards and certificates program.
- Incorporate snapshots of club members lives into club newsletters and email communications.
- Encourage club members to host social events at their homes and other local venues for EDC members and friends.
- Coordinate precinct assignments with EDC volunteers



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- Encourage EDC precinct leaders to then reach to their Dem voters for coffees, extend personal invites to events/meetings, etc.
- Host signature events to draw out potential Democrats.
- Call existing and former members to verify information.
- Poll club members to determine preferences for meetings, events, and other forms of involvement



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5 Communications Plan

5.1 *General*

The communications function is designed to advance the overall goals of the club and to support its fundamental tenets. Communications will work to increase activism through education and by providing current information. Communications will support efforts to increase membership by promoting a reputation for EDC as THE organization for Escondido activists and by creating materials that enable recruiting efforts. Communications will assist fundraising programs by disseminating information through the news media, as well as colleague organizations, and by preparing materials such as invitations and event programs. In all cases, communications will strive to make use of the latest technology to achieve a satisfying activist experience for those involved.

5.2 Goal: To position EDC as THE option for effective progressive activism in the Escondido area.

Objective: Ensure that EDC is credited for its contributions to effective political action for positive change.

Strategy: Communicate effectively to members and friends using the website and emails and other methods to be devised.

Tactics:

- Continue to enhance website and weekly emails.
- Develop a robust social networking system.
- Introduce video to the website (see below).

Strategy: Gain more awareness from the general public through free media.

Tactics:

- Place stories in local newspapers about EDC's involvement in local issues.
- Write and gain publication for articles about collaboration with other local groups and organizations in the newsletters or on the websites of those groups.
- Write and place op-eds representing EDC's position on local issues with authors identified as EDC members/officers.

5.3 Goal: To increase the effectiveness of our communications media in support of branding, increasing membership and encouraging member involvement.

Objective: Encourage two-way communication and add communications vehicles that appeal to younger audiences.

Strategy 1: Introduce video into our website and emails as appropriate.

Tactics:



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- Identify and acquire software programs and hardware necessary to create video presentations.
- Identify individuals who will collaborate to prepare video presentations.
- Prepare some model presentations as a test.
- Make video available to political action for use in advocacy efforts and to membership for recruiting/retention.

Strategy 2: To launch Facebook and Twitter groups and to provide unique, targeted communications to their members.

Tactics:

- Form Facebook and Twitter groups and encourage membership.
- Develop content appropriate to each group and provide appropriate information to members.
- Encourage the development of a community.
- Seek to engage Facebook and Twitter members in EDC activities and, eventually, membership.

5.4 Goal: To enhance the effectiveness of EDC identity elements.

Objective: To support branding, member recruitment and member involvement through more effective communication of the organizational mission.

Strategy 1: To conduct a review and revision of the “tag line.”

Tactics:

- Gather member input.
- Appoint a committee to select a small number of candidate phrases.
- Test those phrases with constituent groups inside and outside of the Club.
- Recommend to the board two or three options.
- Conduct a vote by members.
- Introduce the new phrase in Club communications media.

Strategy 2: To conduct a review and revision of the communications mark (logo).

Tactics:

- Guided by the revised “tag line,” develop concepts for visual representation of EDC’s mission.
- Identify and involve experienced graphic arts professionals to benefit from their expertise.
- Using the same committee in strategy “a,” develop several proposed approaches and test with board and members.



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- Gain comment from external groups.
- Submit final recommendations for member approval.
- Gradually introduce the new mark (logo) into communications vehicles.

5.5 Goal: Use communications to support the goals established by other administrative areas in order to advance political action, membership and other activities.

Objectives: Create relationships that allow rapid and effective response to communications needs by other EDC units.

Strategy: Work closely with VPs, other officers and committee chairs to understand how communications can support their programs.

Tactics:

- Communicate or meet regularly with Club leaders to discuss ways they can use existing communications vehicles and to consider new vehicles or methods.
- Create regular, scheduled opportunities for Club leaders to submit posts for the web site and for email messages, such as “Legislative Corner” posts for Political Action and items about new/renewing members for Membership.
- Monitor the effectiveness of communications to maximize results.



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6 Secretary Plan

6.1 *General*

The goal of the Secretary reflects the duties of the Secretary as being the record keeper of the club. To this end, the Secretary goal for 2010 will be a complete review of the processes and documents that support the Secretary duties. Where necessary those processes will be refined and where absent those processes will be instantiated. The ultimate end state for this year is a Secretary position within the EDC that has clearly defined roles and responsibilities, accurate records that are easily maintained and accessed, and supporting guiding documents that reflect the actions of the club.

6.2 *Goal:* Conduct a review of, and establish where necessary, the Secretary processes, and supporting documents to ensure good processes are in place, records are accurately kept and supporting/governing documents e.g. By-Laws support the actions of the club.

OBJECTIVE 1: Conduct an analysis of the processes for the maintenance of records of all meetings of the Executive Board and of the membership, reports of elected officers, directors of standing committees and chairs of recognized caucuses. Improve or establish those processes where necessary. Establish a pass-down procedure guide for future Secretaries.

STRATEGY:

1. Analyze current processes
2. Improve current processes where necessary
3. Develop new processes where necessary
4. Capture all processes in a pass down procedure guide

TACTICS:

- Review and analyze all current processes that support club record keeping responsibilities
- Improve processes as necessary
- Develop new processes where necessary
- Record processes in pass-down procedure guide

OBJECTIVE 2: Review EDC guidance documents for consonance and compliance with parliamentary procedure.

STRATEGY:

1. Establish a Guidance Document Committee that includes expertise in parliamentary procedure.
2. Provide review guidance and timeline for performance
3. Review Committee recommendations
4. Present Recommendations to the Executive Board



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TACTICS:

- Find a Committee Chair knowledgeable in parliamentary procedure
- Establish Committee
- Develop plan for execution to include timeline
- Present results to Executive Board



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7 Treasurer Plan

7.1 *General*

The Treasurer goals include assuring the Club that all valid financial obligations are fulfilled in a timely manner and that the Club's financial position is accurately and fairly reported to the Board and the general membership. The development of an annual financial budget (or plan), and the tracking of actual cash-flows versus this plan, will help ensure that the EDC continues as a vibrant entity and adheres to the Club's guiding principles.

7.2 *Goal: Close the "books" (G/L) for 2009*

Objective: Ensure availability of accurate representations of the Club's finances at the time of transition to the new board, and at the end of the 2009 calendar year

Strategy: Develop Statements of Financial Condition accurately reflecting the Club's operations and adherence to the budget.

Tactics:

- Ensure final 2009 receipts are deposited, expenses are paid, and all transactions are accurately recorded in the club's financial ledger
- Reconcile accounts and prepare Year-end 12/31/09 Account Balance statement, Cash Flow Statement, and Revenue and Expense versus Plan statement

7.3 *Goal: Develop a Budget for 2010*

Objective: Prepare a financial plan which realistically reflects the goal's of the Club

Strategy: Using historical performance as a guide and incorporating upcoming goals for this year, allot financial resources for each major income and expense category.

Tactics:

- Update the 3-year running average analysis of the club's income and expenses with 2009 data
- Based on the financial implications of the club's 2010 operating objectives, prepare the 2010 financial plan
- Analyze the plan for financial shortcomings and potential exposures or other issues and develop alternative recommendations as appropriate
- Present the 2010 Financial Plan to the board and secure their approval
- Ensure that the Club's 2010 Annual Plan includes the approved budget as an appendix item

7.4 *Goal: Maintain the General Ledger for 2010*

Objective: Monitor the Club's operating income and expenses and report to the Board any realized or potential variances to plan; secure direction and approval from the Board for resolving any significant



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variances from the approved annual financial plan

Strategy: Develop Statements of Financial Condition accurately reflecting the Club's operations and adherence to the budget.

Tactics:

- Deposit all receipts within 2 weeks of receipt
- With Board approval, issue payment for all valid and properly documented club expenses in a timely manner
- Ensure all financial transactions are properly categorized and entered in the Club's financial records
- Prepare financial statements (including actual vs. planned cash flows) for dissemination to the board and the general membership for their review on a monthly basis, or at such times as the Board deems necessary
- Identify significant variances in actual vs. planned cash flows, and recommend to the Board prudent alternatives to address them

7.5 Goal: Replace the current Excel-based accounting system with an inexpensive, standard financial application

Objective: Identify and implement a new G/L system which is easy to use and audit, requires less spreadsheet-intensive "care and feeding", and provides improved reporting capabilities (specifically: this year/last year analyses and standard presentation graphics)

Strategy: Select a P/C based application and parallel the 2009 year-end financial statements with the current application to ensure accuracy, ease of use, and identify/resolve any ongoing cost or operating considerations

Tactics:

- Identify a low-cost alternative to the current Excel-based general ledger
- Prepare the Club's year-end financial statements using both the existing G/L and the new G/L and secure the Board's approval for transferring to the new system

7.6 Goal: With the Board's direction and involvement, facilitate the development and execution of a fund raising strategy for the Club

Objective: Identify fund-raising opportunities to support the Club's goals, drawing on the Board's, and ultimately the Club's, insights, experiences, and commitment

Strategy: Identify the specific steps which must be completed to achieve the Club's financial goals and monitor the progress of those activities

Tactics:

- Schedule and facilitate a Fund-Raising Strategy Development session with the Board; identify next steps (tactics) including required resources, timing and associated roles and present the



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strategy to the general membership for their review and approval

- Monitor the execution of the strategy and report status to the Board on a periodic basis.



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8 Appendix A. Annual Calendar

Date	Event	Location	Note/Theme
January 11 (Monday)	E-Board Mtg	Paul's house	
January 16 (Saturday)	General Mtg	Joslyn Center	Brief Annual Plan
February 8 (Monday)	E-Board Mtg	Paul's House	
February 13 (Saturday)	General Mtg	East Valley CC	Health Care
March 8 (Monday)	E-Board Mtg		
March 13 (Saturday)	General Mtg		
April 5 (Monday)	E-Board Mtg		
April 10 (Saturday)	General Mtg		
May 3 (Monday)	E-Board Mtg		
May 8 (Saturday)	General Mtg		
May 16 (Sunday)	Esc Street Faire	Grand Avenue Esc	10AM – 6PM
June 7 (Monday)	E-Board Mtg		
June 8 (Tuesday)	Primary Election		
June 12 (Saturday)	General Mtg		
July 5 (Monday)	E-Board Mtg		
July 10 (Saturday)	General Mtg		
August 9 (Monday)	E-Board Mtg		
August 14 (Saturday)	General Mtg		
Sept 7 (Tuesday)	E-Board Mtg		
Sept 11 (Saturday)	General Mtg		
Sept 11 (Saturday)	Grape Day		
October 4 (Monday)	E-Board Mtg		



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October 9 (Saturday)	General Mtg		EDC Election
October 17 (Sunday) (Tentative)	Esc Street Faire	Grand Avenue Esc	10AM – 6PM
Nov 2 (Tuesday)	General Election		
Nov 8 (Monday)	E-Board Mtg		
Nov 13 (Saturday)	General Mtg		
Nov 29 (Monday)	E-Board Mtg		
December 4 (Saturday)	Year-end party		



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9 Appendix B. Annual Budget

TO BE ISSUED SEPARATELY



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10 Appendix C. List of Board Members, Appointed Chairs and Special Event Coordinators

EDC OFFICERS FOR 2010

President:	Paul McNamara 3191 Aberdeen Way Escondido, CA 92025 760 739-8119, cell 760 443-6336 ppmcnamara@cox.net
Vice President Political Action (Acting)	Chris Nava 858 Calle Montera Escondido, CA 92025 760 735-9802, cell 760 715-9053 christinenava@hotmail.com
Vice President Membership	Jason Everitt 1051 W el Norte Pkwy #180 Escondido, CA 92026 cell 760 583-5348 jasoneveritt@yahoo.com
Vice President Communications	Rick Moore 779 Cody Lane Escondido, CA 92026 760 740-8595 communicator@cox.net
Secretary	Margaret Liles 10165 Boulder Knolls Dr. Escondido, CA 92026 760-749-9513, cell 760 807-3789 mmliles@aol.com
Treasurer	Edwin Bradley 1368 Stoneridge Cir Escondido, CA 92029 760 489-8738, cell 760 705-5724 edwinbradley@cox.net



EDC Chair Persons

Voter Registration Chair	Allison Marks 3519 Wild Oak Lane Escondido, Ca92027 (760) 747-8138 allisonmarks@att.net
Refreshment Chair	Judy Slane 298 Marquette Ave. San Marcos, Ca 92078 (760) 798-9124 judyslane@cox.net
Hospitality Chair	Delores McQuiston 2300 East Valley Parkway #229 Escondido, Ca (760) 745-8617 Dmcq229@netzero.net
Volunteer Chair	Grace Sloan 1621 Madrone Glen Escondido, Ca 92027 (760)746-0066 gsloan@sbcglobal.net
Fund Raising Chair	_____
GoTeam Chair	_____
Street Fair Chair	_____
Speaker Chair	_____
Parliamentarian	Barbara Bell 954 Montview Escondido, Ca 92025 (760) 745-8873
Sergeant-at-Arms	Dan Buse 1241 Ridgeway Lane Escondido, Ca 92029 Cell (760) 807-7294



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