

DEMOCRACY ALLIANCE 



SPRING 2019
PARTNER RETREAT &
STRATEGY CONFERENCE

April 3-5, 2019 | Austin, Texas

April 3, 2019

Welcome to the Democracy Alliance Spring 2019 Partner Retreat and Strategy Conference. We meet a few months after a momentous Election Day—when voters spoke clearly about the direction they want for the country—and at the cusp of a presidential cycle where the future of our democracy is at stake. In the months ahead, DA Partners will increasingly engage the large, diverse, and strong Democratic presidential primary field, while we work through the DA State POWER Funds and other vehicles to build on the progress we have made to take back power in the states and deliver a strong progressive majority in Congress for the next President.

Our conversation here in Austin will focus on understanding the critical role that the DA must play in the short term to lay a foundation for 2020 victories and make the long-term, multi-year investments to build progressive political power and sustain it. There are fewer faces around because many of you asked for the opportunity for more intimate strategic conversations with other donors, and we hope the format of this Partner-centric retreat will allow for a deeper dialogue and focused debate on the critical work that lies ahead.

We know that the next election is of overriding importance, so we are dedicating Thursday morning to all things 2020 and welcome policy experts and political strategists to discuss with us what it takes to defeat Trump. Then in the afternoon, we'll begin the activation of our new investment strategy, hearing from those who are organizing and mobilizing the ever-growing number of Americans who share our values and are taking action; those on the cutting edge of the work we need to do in the digital realm; address overdue investment in leadership development across the progressive movement; and remedy the structural problems in our democracy that impede us from achieving our vision.

Each Partner also has additional materials on these initial funding recommendations in your registration packet, and we encourage you to review them in advance of Thursday's programming.

We look forward to hearing from Andrew Gillum, a longtime friend of the DA and one of the brightest progressive stars, on his vision for growing progressive power in Florida and across the nation at our Partner Dinner. And we are thrilled to open and end our time in Austin by recognizing the game change happening in Texas, what it means for the politics of the country, and meet many of the people who are leading it.

We built more opportunities in this agenda for Partners to learn from one another, and we hope you'll join the Friday morning roundtables with other Partners, as well as take advantage of the amenities here at Four Seasons and enjoy a moment to explore all this city has to offer.

Thank you for being here with us and for all your contributions to build a more progressive future.

Gara LaMarche, President

John C. Stocks, Chair



AGENDA OVERVIEW

WEDNESDAY, APRIL 3

11:30 am to 2:30 pm
State Victory Fund Board Meeting
 (by invitation only)
San Jacinto East

3:30 to 5:30 pm
DA Board Meeting
 (by invitation only)
San Jacinto East

4:00 to 7:30 pm
Registration Lounge
San Jacinto West

6:30 to 9:00 pm
Welcome Reception and Dinner
Ballroom Foyer & Terrace

THURSDAY, APRIL 4

8:00 am to 8:00 pm
Registration Lounge
San Jacinto West

8:00 to 10:00 am
Networking Breakfast
Ballroom Foyer & Terrace

8:00 to 9:00 am
Prospect Breakfast
 (by invitation only)
San Jacinto East

9:00 to 10:00 am
State Victory Fund Breakfast
 (Partners only)
San Jacinto East

10:00 am to 12:00 pm
Partner Forum: Winning in 2020
Ballroom ABC

12:00 to 1:00 pm
Networking Lunch
Ballroom Foyer & Terrace

1:15 to 2:45 pm
Partner Forum: Investment Strategy
Ballroom ABC

3:00 to 4:00 pm | 4:00 to 5:00 pm
Investment Strategy Roundtables

Candidate Pipeline | *San Jacinto West*
 Digital Capacity | *San Jacinto East*
 Year-Round Organizing | *Little Colony*
 Winning Elections | *Ballroom D*
 Democratic Participation | *Waterloo*

5:00 to 5:45 pm
Investment Strategy Action Forum
 (Partners only)
Ballroom ABC

7:30 to 9:30 pm
Cocktail Reception & Dinner
 (Partners only)
Ballroom Foyer & Terrace

FRIDAY, APRIL 5

8:00 to 10:00 am
Networking Breakfast
Ballroom Foyer & Terrace

8:00 to 9:00 am | 9:00 to 10:00 am
Salon Roundtables (Partners only)
San Jacinto West
San Jacinto East
Ballroom D
Little Crossing
Waterloo

Refer to program insert for table topics.

10:15 am to 12:00 pm
Partner Forum:
Does Big Tech Threaten Democracy?
 (Partners only)
Ballroom ABC

12:45 to 3:00 pm
Texas Future Project Luncheon
LINE Austin Hotel
 111 E Cesar Chavez St.

The *LINE* is one block away at the intersection of E Cesar Chavez St. and Congress Ave. Turn left upon exiting the Four Seasons driveway.

AGENDA: WEDNESDAY

State Victory Fund Board Meeting (by invitation only)
 11:30 am to 2:30 pm
San Jacinto East

DA Board Meeting (by invitation only)
 3:30 to 5:30 pm
San Jacinto East

Registration Lounge
 4:00 to 7:30 pm
San Jacinto West

Welcome Reception and Dinner
 6:30 to 9:00 pm
Ballroom Foyer & Terrace

Hosted by Democracy Alliance and the Texas Future Project, this evening will be an opportunity for progressive leaders and funders from across the state to meet with DA Partners as we mark the major gains made in Texas this past election and double-down on the important work ahead.



Agenda items are subject to change. For the most up-to-date daily schedule, visit the conference website at https://democracyalliance.swoogo.com/Austin_Retreat_2019.

All conference attendees can pick up their credentials at the registration desk in San Jacinto West. **Your credential must be worn at all times.** The registration desk is open daily throughout the conference, and DA staff members are available to answer questions you may have.

AGENDA: THURSDAY

Registration Lounge

8:00 am to 8:00 pm
San Jacinto West

The Registration Lounge will be open all day with seating available for Partners to take meetings or phone calls, or to grab a snack. There will be a video feed of what is happening in the main ballroom for those who have to step out for a moment.

Networking Breakfast

8:00 to 10:00 am
Ballroom Foyer & Terrace

Prospect Breakfast (by invitation only)

8:00 to 9:00 am
San Jacinto East

State Victory Fund Breakfast (Partners only)

9:00 to 10:00 am
San Jacinto East

Join the State Victory Fund for a strategic discussion on generating year-round support in the states to win elections.



Partner Forum: Winning in 2020

10:00 am to 12:00 pm
Ballroom ABC

The opening Partner Forum will focus on what it takes to win in 2020 and defeat Trump.

Join Partners in a discussion about the critical role that the DA must play in the short term to lay a foundation for 2020, as well as making the long-term, multi-year investments to build progressive political power and sustain it.

We welcome political strategists and policy experts to have a frank dialogue with Partners on how to prepare for a robust field of Democratic presidential candidates, understand the issues likely to dominate the primary debate, and outline our offensive and defensive strategy in 2020.

Remarks

Gara LaMarche, *President, Democracy Alliance*
John Stocks, *Chair, Democracy Alliance*

Discussion: What It Takes To Win

Amanda Brown Lierman, *Managing Director, The Women's Project*
Varshini Prakash, *Co-Founder & Executive Director, Sunrise Movement*
Laura Quinn, *Co-Founder, Catalyst*
Stephanie Valencia, *host, Finding 46 podcast*

Want to know more about conference speakers?

Biographies for all speakers are available under the "speakers" tab on the conference website at: https://democracyalliance.swoogo.com/Austin_Retreat_2019.



KATE CLINTON

We are excited to once again be joined by Kate Clinton who will expertly emcee the retreat with her own unique brand of progressive comedy during each day's programming.

Networking Lunch

12:00 to 1:00 pm
Ballroom Foyer & Terrace

Grab lunch and connect with fellow Partners. Seating is available throughout the lower level and outdoor terrace.



Partner Forum: Investment Strategy

1:15 to 2:45 pm
Ballroom ABC

The afternoon Partner Forum will roll out the initial recommendations of the DA's new investment strategy. The session will feature presentations by leaders at the forefront of the recommended priority funding areas. A detailed look of the investment strategy is available in your registration folder.

Presentation by Investment

Committee members
Daalyah Bilal-Threats
Farhad Ebrahimi
Joan Huffer
Shekar Narasimhan

Forum Moderator

Julie Kohler, *Senior Advisor, Democracy Alliance*

Supporting Year-Round Organizing

Rev. Alvin Herring, *Executive Director, Faith in Action*

Enhancing Digital Capacity

Tara McGowan, *Founder and CEO, Acronym*

Winning Elections

Jim Gollin, *Chair, New Mexico Donor Table*
Video remarks from New Mexico Governor **Michelle Lujan Grisham**

Building a Candidate Pipeline

Del. Kathy Tran, *42nd House District of Virginia*

Increasing Democratic Participation

Nancy MacLean, *William H. Chafe Professor of History and Public Policy, Duke University and author of Democracy in Chains: The Deep History of the Radical Right's Stealth Plan for America*

Looking for meeting space to have a conversation with other Partners at the retreat? Tables are available to reserve in the lower level meeting rooms. Visit the Registration Lounge to review the meeting schedule and availability.

AGENDA: THURSDAY

Investment Strategy Roundtables 3:00 to 4:00 pm | 4:00 to 5:00 pm

Join small-group discussions to learn more about the priority investment areas and strategize funding opportunities with the progressive leaders at the forefront of these initiatives. Each of the five, initial funding priorities identified in the DA's investment strategy will have a dedicated room for discussion and collaboration. These roundtables will repeat at 4:00 pm.



Year-Round Organizing Little Colony

JaNaé Bates, Communications Director, ISAIAH
Rev. Jennifer Butler, Founder & CEO, Faith in Public Life
George Goehl, Director, People's Action
Rev. Alvin Herring, Executive Director, Faith in Action
Alexa Horwath, Lead Organizer, ISAIAH
Matt Morrison, Executive Director, Working America



Digital Capacity San Jacinto East

Tara McGowan, Founder and CEO, Acronym
Julie Menter, Managing Director, New Media Ventures
Wes Panek, Investment Manager, New Media Ventures
Laura Quinn, Chief Innovation Officer & President, Catalyst



Winning Elections Ballroom D

Dave Montez, State POWER Funds
Del. Marcia Price, VA BLOC
Lisa Gulde, Women Effect Action Fund
Kim Anderson, State Victory Fund
Scott Anderson, Committee on States and State Victory Fund
Dana Hall, New American Majority Fund
Roger Kim, Climate Equity Action Fund
Jillian Murphy, Climate Equity Action Fund



Candidate Pipeline San Jacinto West

Denise Ferlozzi, Pipeline Initiative
Sarah Johnson, Director, Local Progress
Sara Beth Mueller, Acting Executive Director, re:power
Jessie Ulibarri, Executive Director, State Innovation Exchange



Democratic Participation Waterloo

Brian Kettenring, Co-Executive Director, Center for Popular Democracy
Maurice Mitchell, National Director, Working Families
Tiffany Muller, President and Executive Director, End Citizens United

Investment Strategy Action Forum (Partners only)

5:00 to 5:45 pm | Ballroom ABC

Join the Investment Committee in signaling support for the DA's recommended investment strategy and funding priorities. Cocktails and refreshments will be served.



Cocktail Reception & Dinner (Partners only)

7:30 to 9:30 pm

Ballroom Foyer & Terrace

Thursday's programming wraps up with cocktails on the terrace followed by a dinner recognizing Partner leadership and featuring keynote remarks from **Andrew Gillum** and special guest, Congresswoman **Jennifer Wexton** of Virginia.



AGENDA: FRIDAY

Networking Breakfast

8:00 to 10:00 am
Ballroom Foyer & Terrace

Seating is available throughout the lower level and outdoor terrace.

Salon Roundtables (Partners only)

8:00 to 9:00 am | 9:00 to 10:00 am

Grab breakfast and then join a Partner-led roundtable on a topic of mutual interest or become more informed on something that may be new to you. These discussions are with DA Partners only.

Please refer to your program insert for table topics or review the listing posted in the Registration Lounge.

Discussions will take place in the following rooms.

San Jacinto West
San Jacinto East
Ballroom D
Little Colony
Waterloo



Partner Forum: Does Big Tech Threaten Democracy?

(Partners only)
10:15 am to 12:00 pm
Ballroom ABC

The Partner retreat concludes asking the question, "Does Big Tech Threaten Democracy?" When they were still considered startups, digital companies such as Google, Amazon, Facebook, and Twitter seemed to many as benign and even socially positive forces; making possible rapid research, quick fulfillment of consumer needs, and creating a social connection. Now there is mounting concern about monopoly power, political manipulation, discrimination, theft of attention, and social polarization. No one concerned with democracy, justice, and a fair economy can afford to ignore these concerns.

Stacy Mitchell, author and co-director of the Institute for Local Self-Reliance

Rashad Robinson, President, Color Of Change

Marc Rotenberg, President and Executive Director, Electronic Privacy Information Center (EPIC)



DEMOCRACY ALLIANCE PARTNER RETREAT AND SPRING CONFERENCE

Texas Future Project Luncheon and Discussion

(advance registration required)
12:45 to 3:00 pm
LINE Austin Hotel
111 E Cesar Chavez St.

The Texas Future Project welcomes DA Partners to join a special afternoon of programming immediately following the conclusion of the spring retreat and strategy conference. Hear from movement leaders supported by TFP as they discuss what's next for expanding progressive power in the Lone Star State.

Bigger than Bet: Turning Texas Blue

No longer a "non-voting" state, Texas is quickly becoming a competitive political landscape and is building progressive power. What do big gains in Houston, Dallas, San Antonio, Austin and surrounding counties mean for the future of Texas?

Yvonne Gutierrez, Executive Director, Planned Parenthood Texas Votes

Mimi Marziani, President, Texas Civil Rights Project

Oscar Silva, Executive Director, Battleground Texas

Michelle Tremillo, Executive Director, Texas Organizing Project

Moderator: Gara LaMarche, President, Democracy Alliance

Walking directions: exit the lobby of the Four Seasons and turn left on E Cesar Chavez St. The LINE is one block away at the intersection of E Cesar Chavez St. and Congress Ave.



SPRING 2019

INFORMATION

PARTICIPATION GUIDELINES

The Democracy Alliance strives to create a safe place for progressive funders and movement leaders to meet and discuss issues of common interest, develop relationships through dialogue and networking, and engage in conversations about progressive ideas and strategies.

One of the primary purposes of this conference is to generate support for progressive groups in the DA portfolio and engage in diverging perspectives connected to shaping political and policy transformation in America. In order to create a comfortable environment for everyone, we politely request that attendees not solicit one another for projects outside the DA's purview at this conference.

DA conference participants are entitled to the expectation that their conference experience and their identity should remain confidential. In order to keep faith with that expectation, we ask Partners and guests to:

- Wear your name badge at all times while within the conference area, and make sure your credentials are clearly visible to staff when entering the ballroom and meeting rooms.
- Refrain from leaving sensitive materials in public spaces. We ask that all attendees dispose of unwanted conference materials in specially-identified recycling bins.
- Respect the privacy of others in attendance and not share individuals' names or details of the conference on social media channels.
- Programming at the spring conference is off the record and the event is closed to members of the media.
- Any video recording and photography is under the supervision of DA staff and for archival purposes only.
- If you have questions about conference programming or guidelines for participants, please speak to a DA staff member at the registration desk.

A NOTE FOR FOUNDATION REPRESENTATIVES

Foundation Representatives should review the conference agenda and decide whether there are any sessions they believe would not be appropriate for them to attend or prefer to attend in their personal capacities. Democracy Alliance staff and counsel are available to discuss any questions about the content of conference sessions.

PROGRAM PARTICIPANT AGREEMENT

The Democracy Alliance seeks to foster an environment where all participants are welcomed, supported, and shown respect. Upholding the following guidelines in all dealings between members of the Democracy Alliance community—while participating in Democracy Alliance business (meetings, calls and conferences), or in other interactions with our community members outside of formal events—is central to maintaining our core values. As a community of progressive leaders, we accept our responsibility to create a culture and environment that is consistent with these values.

Each participant in Democracy Alliance programs—attendees, partners, staff, board members, speakers and vendors—agrees to uphold these high standards of integrity and professionalism:

- Do not subject others to unwanted sexual advances, coercion or bullying of a sexual nature, or the explicit or implicit promise of rewards in exchange for sexual favors.
- Do not engage in behavior that is verbally or physically unwelcome, harassing or bullying on any basis.
- Do not mistreat others for any reason, including race, color, creed, sex, religion, marital status, age, national origin or ancestry, physical or mental disability, medical condition, sexual orientation or gender identity, military service, personal appearance, or family responsibility.
- Embrace diversity and accept that different backgrounds, perspectives and views are encouraged and valued.
- Encourage honest dialogue and the airing of disagreements but expect this to be conducted with respect to different perspectives, without bullying or ridicule and absent personal attack.
- Never threaten, encourage or engage in violence toward other attendees.
- Be continuously mindful about whether your behavior upholds these core values.

As a program participant, you agree to conduct yourself honorably and professionally in your Democracy Alliance interactions and to abide by the standards in this Statement of Core Values. You understand that the Democracy Alliance may remove you from its programs if it determines in its discretion that you have acted inconsistently with its policies or this Statement.

If you have experienced or witnessed conduct inconsistent with the above values, please report such event to the Democracy Alliance Executive Vice President Kim Anderson or General Counsel Deborah Ashford.

DEMOCRACY ALLIANCE 

www.democracyalliance.org



CLIMATE LEADERS

