**FROM: Courtney Lee-Ashley**

**DATE: December 2014**

**SUBJECT: End of Cycle Memo**

***OVERVIEW – DIRECTOR OF MEMBER OUTREACH***

**Director of Member Outreach Overview**

The primary responsibility for the Director of Member Outreach is to raise Member dues, one of the main revenue streams for the DCCC. Member dues refer to contributions raised directly from Members of Congress (or anybody with a campaign committee or leadership PAC). Historically, Member dues provided as much as a third of the DCCC’s fundraising. This is largely due to the ability of Members to contribute unlimited amounts of money to the DCCC from their campaign committees. This fact, combined with the low overhead of the efforts to raise Member money, makes Member dues the most cost effective form of fundraising at the DCCC. *This cycle, the DCCC raised over $28 million in Member dues.*

**Director of Member Outreach & Deputy National Finance Director Overview**

The Director of Member Outreach is in charge of raising Member dues from the Democratic Caucus. The director works to raise this money at the staff level, as well as coordinating Member to Member asks, primarily with House Democratic and DCCC Leadership. This person also manages the DCCC Caucus Report, a document tracking the Democratic Caucus’ efforts in support of the DCCC. This document is primary means by which Members are encouraged to give to and raise for the DCCC, as it is sent out regularly to the entire Caucus. The Member Dues Director also serves as a primary point of contact between the DCCC Finance Department and Democratic Member offices. As such, this position fills a variety of roles and performs a variety of tasks relating to Member contact as needed.

The Deputy National Finance Director is responsible for stepping in when the Deputy Executive Director for Finance and the National Finance Director needed support. This role was invited to participate in Senior Staff morning meetings when the Deputy ED and the Finance Director were traveling and also attended the daily finance meetings to discuss budget needs. At the beginning of the cycle, the Deputy National Finance Director oversaw the planning and targeting for fundraising surrounding the DC region. This was helpful in transitioning as the DC region raises the majority of the money during the first quarter of the year.

**Member Dues Structure**

In addition to the Director of Member Outreach, the DC Finance Assistant served as the part-time assistant. It was helpful to have second person, albeit part-time, to help with preparing documents to send up the hill for communication with the Democratic Caucus. It is also helpful for tracking events and helping with the day-to-day responsibilities of raising Member dues.

**Member Dues Documents**

Member Dues Documents are found in the Finance Drive>Member Dues. The most recent cycle is located in the Member Dues 2014 folder.

**Master Member Database**

The Director of Member Outreach creates a spreadsheet that serves as a master database for all things relating to dues and caucus outreach. The 2014 version is located in the Member Dues 2014 main folder and can be found here – S:\Member Dues 2014\Member Dues Master Sheet.

Currently, the Director of Member Outreach and the Member Dues Assistant are the only people that have access to edit this document.

The Master Member Dues sheet is the main database for basically all Member info as it relates to DCCC dues. This excel document catalogs relevant info for Members including: campaign addresses, cash on hand (for each quarter of the cycle), dues goal, dues received, monthly dues, pro-rated outstanding dues (needs to be updated monthly), previous cycle dues history, office contact info, Member direct contact info, four levels of Member staff contact info, scheduler contact info, group membership (CBC, CHC, New Dems, Women, etc.), committee assignments, and anything else that is helpful to track.

This document serves as a template for other needs, such as target lists, summaries of committee or caucus dues as requested, specific contact sheets, etc. The list is used as a base to mail merge call sheets, floor cards, thank you notes, etc.

**Member Office Contact**

The Member Dues Director serves as a primary point of contact with Member offices, not just as it relates to dues, but for scheduling, and a variety of ad-hoc outreach needs.

* + *Scheduling* – The Member Dues Director is responsible for Member attendance at large DCCC events in DC where the Democratic Caucus is invited. As such, it is important to keep the schedulers list as up to date as possible. For the big quarterly events (Member Dinners and PAC Receptions), Member RSVPs are tracked. The invitations to these events should be blasted out to Members’ schedulers several times, and all offices should be called at least once prior to the event (excellent job for interns). The Member Dues Director will also be asked to coordinate Member attendance at various national DCCC events as needed.
	+ *Hill Drops* – The Member Dues Director periodically coordinates hill drops to disseminate invites, Caucus memos, dues invoices, the caucus report, etc. Other departments will often do hill drops; coordination with departments is helpful as timing can matter for some. Departments within the DCCC that typically have items for hill drops are press, member services and candidate fundraising.
	+ *Caucus Report* – The DCCC Caucus Report is sent out monthly. This can be hill dropped or sent out electronically. It is helpful to send other pertinent updates to Member offices at the same time (invites, memos, etc.).
	+ *Member Updates* – The Director of Member Outreach often distributes other memos or political info as needed, given the position’s role as a primary point of contact with Member offices.
	+ *Member personal contact info* – The Director of Member Outreach keeps and updates Member cell phones and email addresses. This has traditionally been kept in the Member Dues Master Sheet.

**Fundraising Overview & Member Group Breakdown**

*Basic Stats*

Total Raised (as of 12/12/2014): $28,081,531

90% of Members contributed dues this cycle

77 Members of Congress paid dues in full (compared to 67 during 2012 cycle)

43 Members of Congress gave dues above their 2014 goal

100% of the Freshmen Class contributed dues this cycle

*Group Breakdown*

Leadership: 100% paid in full, contributed $5,195,000 this cycle

Ranking Members: 8 out of 22 paid dues in full, contributed $4,412,704 this cycle

DCCC Leadership: 14 out of 29 paid dues in full, contributed $7,020,899 *(part of this money is Democratic Leadership – Clyburn, Becerra, Crowley, Israel)*

Women Members: 23 out of 63 paid dues in full, contributed $8,743,279 this cycle

Freshmen Class: 19 out of 52 paid dues in full (20 Frontline), contributed $3,837,707 this cycle

CHC: 8 out of 25 paid dues in full, contributed $2,626,500 this cycle

CBC: 10 out of 42 paid dues in full, contributed $4,657,210 this cycle

CAPAC: 16 out of 38 paid dues in full, contributed $4,897,050 this cycle

New Dems: 18 of 52 paid dues in full, contributed $5,590,676 this cycle

Blue Dogs: 5 out of 18 paid dues in full, contributed $1,399,900 this cycle

Progressives: 24 out of 68 paid dues in full, contributed $9,354,312 this cycle

***FUNDRAISING OVERVIEW***

**DCCC Leadership**

Leadership within the DCCC is set early in the cycle. Chairman Israel and senior staff created the team and structure together. From there, the chairman made Member-to-Member asks on the floor and during the Democratic Caucus Retreat. The Director of Member Outreach is responsible for managing these asks and following up with appropriate staff.

**Democratic Caucus Retreat**

The Director of Member Outreach attends the Democratic Caucus Retreat each year. We use this time to ask Members to pay dues, host in-district events and serve in leadership roles. The DCCC Chairman presents during the retreat and this position helps to prepare the chairman for his presentation and the asks that need to be made. See the “Caucus Retreat” folder in the share drive for what we prepared last year.

During the caucus retreat, the DCCC hosts a happy hour for Members of Congress. This is a great opportunity to ask Members for help during the coming year. You will NEVER have that many Members in one room to get things accomplished.

**Involvement with Other Departments**

The Director of Member Outreach works with various departments in the DCCC including the communications, candidate fundraising, member services, policy and the accounting departments. It is extremely important that Member communications come from a coordinated front. Press stories can be pitched around dues giving and events

**Tactics Used to Raise Money**

***Caucus Report***

The DCCC Caucus Report is the driver of the Member Dues program. It is a spreadsheet outlining everything the Democratic Caucus does to support the DCCC.

The DCCC Caucus Report, sent out monthly to Member offices, is organized into tiers based on leadership and committee assignments within the Democratic Caucus. According to these tiers, Members are assigned a DCCC dues goal and a DCCC raise goal. Dues includes only what Members give directly from their campaigns or leadership PACs to the DCCC. The “raise” goal refers to money Members raise on behalf of the DCCC from four different buckets: (1) individuals, (2) PACs, (3) tribes, and (4) other Members of Congress. This “raise” goal is tracked through tally codes in NGP.

The DCCC Caucus Report also tracks giving and raising that the Members do on behalf of DCCC Frontline Members and Red to Blue Candidates, as well as DCCC Member Points. The Member Dues director coordinates with the Candidate Services Director to add in those updates before each DCCC Caucus Report is sent out. *The Candidate Services Director will track as much as they can, but it is important to let Member offices know that updates are largely self-reporting.* The Member Dues director will undoubtedly receive updates from Member offices, which need to be forwarded on to DCCC Candidate Services, and logged for tracking purposes.

***Member to Member Asks***

While many Member offices will respond to dues asks on a staff level, some Members will require an ask from their colleagues. The Director of Member Outreach facilitates these asks and creates target lists for the Members to solicit. There are two main tools for Member to Member dues asks: call sheets and floor cards.

* + *Call Sheets*
		- Call sheets are used for Member to Member dues solicitation, mainly by Leader Pelosi. Chairman Israel never made dues calls – he preferred to email his colleagues to ask for dues.
		- The call sheets themselves can be made with mail merges, using the Master Dues Sheet as a base. Sample call sheets can be found in the Member Asks folder in the share drive. Templates are created so mail merges are simple to pull. Member cell phone numbers are the primary contact info of concern, though DC offices, District offices, and primary staff contact info should be listed.
		- Call Sheets should list current Dues info, previous cycle Dues history, primary and filing dates for that Members’ state, and any other info that may be necessary. Notes should also be added for most recent Dues contributions, pertinent political info, notes about other DCCC involvement, etc.
	+ *Floor Cards*
		- Floor cards are used much more frequently for dues asks. Templates can be found in Member Asks>Templates.
		- Chairman Israel used floor cards more frequently. Other Members of leadership should also be given floor cards on a regular basis, including Democratic & DCCC Leadership. Other Members who are helpful can be used as needed. Lists of cards for all of these Members should be targeted out to increase effectiveness.
		- Member cards should be used as much as possible when Members are in session, sending up cards to leadership unsolicited if need be.

***Events***

Raising Member dues is not an event driven fundraising position in the same way that the other regions of the finance department are. However, there are a handful of Member focused events that are the responsibility of the Director of Member Outreach. Moreover, due to the nature of the position, the Director of Member Outreach will frequently help to coordinate Member outreach to events with other regions.

* + *Quarterly Member Dinners* – Every quarter Leader Pelosi and Chairman Israel host a dinner in the 3rd month of the quarter and invite the Democratic Caucus. Dates are selected in conjunction with the Leader and the Chairman’s office and should be chosen several months in advance if possible. Member dinners are often held in the Wasserman Room in order to save on money, but occasionally, they held in restaurants to make them more appealing. The DCCC events director will coordinate event logistics, usually with guidance on a particular theme. An invite must be made and approved for the Member dinner per DCCC finance operating procedures. That invite is sent out to Member offices, usually at least a month in advance if not more. They are included in hill drops, sent to schedulers, sent to the dues distribution list, etc. Reminders are periodically sent out, and schedulers should be called through at least once in advance of the events. Interns can be tasked with this. Briefing materials must be prepared for Leader Pelosi, Chairman Israel and any other Members speaking at the event. The program usually involves a brief political presentation (make sure to alert IT well in advance of any A/V needs).
	+ *Political Updates and Staff* – The DCCC also holds periodic (more or less quarterly) political updates for Chiefs of Staff and Staff directors. Dates are picked in coordination with the ED’s office, the Policy Director and the Member Services director. They are usually held on days when the House is out of session, as a lunch or mid-morning event. At past updates, the DCCC buys lunch for the Chiefs in attendance. Attendance is usually anywhere from 40-75 people depending on external factors. Sample invites are found in the Member Events folder.
	+ *Major DCCC Events* – The Director of Member Outreach also helps coordinates Member attendance/invites at major DCCC events (such as issues conferences) as needed. In these cases, the director will need to be in touch with Member offices about RSVPs, hotel block info if needed, invite approval, speaking program/roles, briefings, etc.
	+ *Napa* – Leader Pelosi invites a select group of Members on her Napa Valley trip every year. Once that list is selected, the Member Dues director will coordinate with Member offices on all relevant info, such as hotel blocks, briefings, etc.
		- **IMPORTANT: Leader Pelosi is the ONLY person who decides which Members attend Napa. Until that list is approved, no information about the weekend should be sent to any Member offices. If Members inquire about the weekend, they should be informed that the Leader personally handles all of the inviting.**
	+ *Democratic Leadership Call Time*
		- Leader Pelosi and Chairman Israel will periodically host call time with House Democratic Leadership. The aim of these meetings is usually to provide a political and/or financial update, and frequently to enlist the help of leadership in soliciting colleagues for support. These meetings became more frequent in the latter portion of the cycle.
		- For dues, these meetings present an excellent opportunity to split up targets. DCCC staff would have several sets of Member ask cards and call sheets available. Leadership would go through card by card to call or divide up targets.

***DCCC Leadership & Ranking Member Meetings***

DCCC Leadership & Ranking Member meetings started in December of 2012 after several “rank and file” Members of Congress complained that Democratic Leadership and “rank and file” Members were the only people contributing DCCC dues. They reiterated that Ranking Members should be held accountable for dues because of their position within caucus.

Ranking Member meetings happen weekly in Leader Pelosi’s office, but the DCCC is now responsible for hosting and setting the agenda for one Ranking Meeting per month.

These meetings are scheduled to engage Leadership and Ranking Member on DCCC activities. In addition to asking for dues from these Members at meetings, this is an opportunity to get these Members updated on DCCC press successes, involved with DCCC Frontline and potential recruits, and removed some of the responsibility of whipping dues from Leader Pelosi and Chairman Israel.

This program was very successful and I highly recommend it continue in the 2016 cycle. The Director of Member Outreach is in charge of setting the agenda and coordinating materials. In addition to the caucus report, we pulled ***committee reports*** for the meetings. Examples of this report can be found here: Member Dues 2014>Ranking Members>Ranking Member Reports.

***DCCC Sustainers Program***

The DCCC Sustainers program is a monthly payment program that the DCCC established in the 2012 cycle for Members to pay their dues. The DCCC Sustainers program was created to encourage Members to pay their dues on a monthly basis in smaller manageable increments. The program allows campaigns to budget monthly for dues and helps the DCCC to have an idea of monthly revenue stream from the dues piece. During the 2014 cycle, there was approximately $200,000 pledged and most of the contributions came in effortlessly on a certain date each month. Members appreciate participating in the DCCC Sustainers program because their colleagues *don’t* hassle them for dues on the floor.

During the 2012 cycle, the DCCC incentivized the program with various call room perks, an email to DCCC donors in their district, targeting assistance, and special convention packages. There were no perks offered in 2014, but the program was still continued and successful.

Members can setup automated payments via the DCCC dues website several ways. See the “Member Dues Website” section for those options.

***Dues Invoices***

Members are also sent DCCC Dues invoices periodically and serve as a reminder to contribute dues. Hard copies are sent out via hill drop, often with the DCCC Caucus Report. The invoices outline each Member’s goal, what they have paid to date, and what they owe by the end of the current month on a pro-rated basis. In 2014, the cycle was divided into 22 months for monthly invoicing and internal planning purposes. If Members were to follow their invoicing, they would pay 1/22 of their cycle dues goal by the end of January 2013 and finished out the goal completely by October 2014. This seems like an archaic practice, but some older Members of Congress use these invoices to structure their pay. Member offices look to this document much more closely at the beginning of the cycle.

Dues Invoices are created by a mail merge. Samples can be found in the “Member Dues” folder under “Invoices.” Invoices are not sent to House Leadership, Frontline, Members who have paid in a given month, monthly sustainers, Members running for other offices, and any others as per DCCC staff discretion. Typically, invoices are created monthly but taper off towards the end of the cycle as Members complete their dues goal. Early in the cycle, Members who have given in an early month of the quarter won’t receive an invoice until the next quarter (basically, skip them if they recently gave dues). The invoice template can be tweaked based on the particular needs or points of emphasis at a given time.

***Additional Reports*** *- Committee Reports*

This is the first cycle the DCCC pulled *Committee Reports* for Democratic Ranking Members. The report allows Ranking Members to see their committee’s progress on paying dues. It was created to hold Ranking Members accountable for their own fundraising and for their committee. You can find the report setup here: *Member Dues 2014 >Ranking Members>Ranking Member Reports*. The excel file is created for you but needs updated COH and dues information. You can easily cut, copy and paste the information from the master dues sheet into the report excel file but don’t forget to change the font type and size (Times New Roman, 14 ft). Once the information is updated, use the filters to create charts for the following: Exclusive Ranking Members, Ranking Members, Leadership, and each Democratic Committee. This information should be pasted into the mail merged word documents.

*\*For some reason, I had trouble printing this document in word – I* ***highly*** *recommend saving the merged, ABC ordered document into PDF format and printing it from there.*

***Additional Reports*** *– ABC Reports*

This document was not created until very late in the cycle. The Director of Member Outreach is probably the only person that has the order of the caucus report memorized, so this report was great to send to Member offices because it outlined dues giving alphabetically with the Leadership and Ranking Members highlighted on the first page. This report was setup within the Master Member Dues sheet on the tab called “ABC Report” – from there, it was pasted and flipped into a PDF document.  *I would recommend doing this every few months and start earlier in the cycle.*

***ADDITIONAL ITEMS TO NOTE***

**Member Dues Website**

Members have the option of paying their dues via a dedicated website: [www.dccc.org/DCCCDues](http://www.dccc.org/DCCCDues). This page allows Members three options for paying their dues: (1) credit card, (2) one time online bank transfer, or (3) automated, recurring online bank transfer. For the credit card option, the process is fully automated. For the online bank transfers, Members fill out forms on that page and email/fax them to the DCCC with a voided check copy. DCCC staff then inputs the contribution & bank info into the payment system. The online team handles website maintenance and the operations manager handles the bank transfers.

**Caucus Memos**

House and DCCC periodically distribute memos with political updates, solicitations for dues, etc. These are frequently done under the Member Dues umbrella, and coordinated to coincide with DCCC Caucus Reports, dues invoice drops, etc. Depending on the circumstances, hard copies are sent out, accompanied by an emailed PDF. The Director of Member Outreach will often coordinate distribution and send out these memos directly to their distribution list.

**Member Thank You Notes**

Monthly thank you notes are sent from Leader Pelosi and the DCCC Chairman to Members who make dues contributions. The director requests an updated version of the thank you letter more or less quarterly from the DCCC staff writer. It is a modified version of the other finance thank you letters. The Member Dues thank you notes are sent to Member congressional offices as a part of hill drops. Notes are tracked in the Master Member Dues sheet to draw from on a monthly basis. These are mail-merged and saved in the Member Dues 2014 share drive in the “Thank You Note” folder.

***HOW TO GUIDE***

**Logging Member Checks**

Member checks are processed in NGP similar to PAC checks. Campaign committees and Leadership PACs are linked to a Member’s candidate entry. For Campaign Committee checks, there are a few key notes. The account is always 607. All Member Dues checks need to be tallied as “Member Dues” and whatever other Members are deemed to deserve credit. This usually includes Leader Pelosi as a default. In previous cycles, Rep. Clyburn has received credit for all CBC dues checks. There are a few other notes outlined below.

Unlimited Transfer vs. Contribution – Per FEC rules, Members are allowed to give the DCCC as much money as they desire, beyond the $30,800 limits. When a campaign does so, it is considered an Unlimited Transfer of Excess Campaign Funds (or some variant of that). We use to differentiate this in NGP, but now all campaign contributions are considered “unlimited transfers” and she be logged as TYPE O in the database. The CODE 1 should be “NT – non memo-ed note.” Furthermore, the NOTE section should be filled in with “Unlimited Transfer.”

Leadership PAC checks are always listed as TYPE C – Contribution and should be logged under Account 617. The CODE 1 should be “NT – non memo-ed note.” Furthermore, the NOTE section should be filled in with “Contribution.”

**Pulling the Caucus Report**

Operationally, the Caucus Report is set up to pull financial info from NGP, for both Dues and Raised, highlighting the importance of NGP accuracy. The Member Dues Director will set the date for the Monthly Caucus Report internally. Several days prior to that, the Member Dues Director will begin to update the Caucus Report in order to send out a draft. The steps are outlined below:

* Open the “113th Caucus Report Master” excel file in the *2013-2014 Caucus Report* folder.
* Enable Macros in the excel sheet under “Options” and click *Enable Content*.
* The “Dues” and “Credit” sheets formulate the “Base” sheet in this folder. To start the process, remove information from the two feeder sheets.
* For the next step, log into NGP to pull two reports. The reports are pulled by this path: *File>Exports>Built to Order*. You want to pull the “Credit” report and the “Dues” Report.
* Next, you copy each excel file’s text into the “113th Caucus Report Master” excel file into the corresponding “Dues” and “Credit” sheets.
* In addition to using this information in the master sheet, you also create a similar file to track the manual caucus report changes.

*See Example: Member Dues 2013-2014>2013-2014 Caucus Report>Credit>12.31.13 CR Bumps*

This file tracks manual changes for the dues and credit sheets. Each sheet should be entitled “Dues Bumps” and “Credit Bumps”.

* From here, you reconcile the manual changes from the previous month and add them to the corresponding sheets. You also add your current Member dues pledges from the “Money In & Commits” sheet into the “Dues Bumps” section. Please add $9,097 to Anna Eshoo’s record; this is for her in-kind for the DCCC finance event in DC.
* Once the “CR Bumps” file is complete, make those changes into the “Dues” and “Credit” sheets of the master sheet. Note: the amounts changed on the dues/credit sheets will be reflected on the “Base” sheet after being updated. *DON’T MAKE CHANGES ON THE BASE SHEET.*
* In addition to tracking the “Dues Received” and “DCCC Raised” in the caucus report, you need to add the “Frontline & R2B Contributions/Raised” and the “Member Points” columns. Candidate Fundraising (Mary Ryan) compiles these numbers. They can be found here:

*Member Dues 2014>2013-2014 Caucus Report>Member Points>Current Member Points Tracking*

* To add these columns to the master sheet, you need to first enable the macros on the tracking document and hit CTRL+T on the keyboard. This will compile all the months into the “Summary” sheet.
* From the “Summary” sheet, copy and paste the corresponding columns into the master sheet. Make sure to delete all the zeros from the two columns in the master sheet; this is an entirely stylistic edit.
* Once those steps are complete, compare each column in this report to last month’s report to make sure there aren’t any major discrepancies. If there are, flag them for the appropriate person (mainly you, regional directors or candidate fundraising).
* If you feel confident it is correct, hit save on the master sheet. Then you save it in two different formats. The first should be saved in excel with macros enabled here: *2013-2014 Caucus Report>Caucus Report-Excel*. The second should be saved as a PDF here: *2013-2014 Caucus Report>Caucus Report-PDF*.
* To get the report approved to send out, email the proofed document to FINANCE ALL, Mary Ryan and Nicole. Finance Regional Directors will not respond to your email; I recommend walking the hard copy around to their cubicles to receive sign off. To get Missy’s final approval, print out a hard copy of the document and hand it directly to her. Give her a deadline for approving it.
* Now that you have the caucus report approved, it’s time to send it out. The blast list is in the “2014 Master Dues Master Sheet” under the “Email List” sheet. Attached is a sample email to send. In addition to the blast list, I send the caucus report to the following people: Missy, Stella, Kelly Ward, Jesse Ferguson, Emily Bittner, Nicole Eynard, Mary Ryan Douglas, and FINANCE ALL. Recommendations for this email:
* Make sure everyone is BCC’d
* Always add a deadline for people to report/submit points and add candidate money
* Mention that this is this month’s *DRAFT* report
* Only send the report out as a PDF
* General Recommendations & Notes – (1) the press team usually gets a heads up when we send this out, (2) triple check everything because you get yelled at from Member staff, (3) make sure Missy is happy with Pelosi’s #s, (4) make sure the report header says MONTH + DRAFT, and (5) only money that is received by the DCCC counts in the “DCCC raised” column (hard commits don’t count).

***EXIT MEMO ATTACHMENTS***

Finance Plan

Member of Congress Notes (NEED TO FINISH THIS PIECE)