Exit Memorandum

To: Hayley Dierker

Cc: Missy Kurek, Stella Ross, Amelie LeBreton

Fr: Corey Miller

Dt:

RE: 2013-2014 South Finance Assistant End of Cycle Memo

**OVERVIEW**

The Finance Department at the DCCC is one of the larger departments in the organization. The 2013-2014 South team consisted of a Director and a Finance Assistant. The South team is tasked with raising high-dollar contributions from the southern region states, which for this cycle included: Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas and Virgin Islands. However, Texas and Florida are the most important states in the region as they generate the most money.

The Finance Assistant’s main responsibility is to assist the Director in the day-to-day operations and implementation of the finance plan. The responsibilities are primarily linked to 1) daily administrative and organizational support (e.g. processing contributions, database management and donor maintenance) and 2) development and execution of all fundraising events in the South region.

**Processing Money:**

ALL checks, credit card and online contributions that are received VIA fax, mail, UPS, FedEx etc. will be scanned and emailed to you from the Finance Operations Director as PDFs. All PDFs of money will have the same title path: “LAST Name, First Name, Date, Region” [Example: “Mostyn, Amber 1-20-14 South”].

Once you receive the email with the PDF attached, follow the below outlined steps immediately:

Save the PDF in the correct folder. For 2014, all check copies were saved in the appropriate folder under **S:\South\South 2013-2014\2014\2014 Check Copies**.

Log the money into the “Money In” spreadsheet (see Money In section)

Log the money into the daily money chain

Note if the money is a resolved problem check (\*see Problem Check section)

If the money has already been entered on the chain as a Hard Commit, it doesn’t need to be added again

Log the money into NGP

Note the source of the check – ex. “NP Meeting”

Note which members to “tally” credit to in NGP

Print one copy of the transmittal. Print and give to the Finance Operations Director. Save the PDF of the transmittal in the 2014 Check Copies folder.

Money In:

* Every evening, the Finance Operations Director will ask that you send “money in and commits”. This means she wants you to send in any NEW money that you received that day. Your Money In goes into the daily *SNAP*: This is a daily ‘snapshoot’ of fundraising intake. It is critical that your Money In is accurate because DCCC leadership uses the ‘SNAP’ to gauge where we stand financially, which is vital to making the wise budgetary decisions.
  + - 1. **Money In:** any NEW money that came in that day and is not a problem check
      2. **Hard Commits:** any NEW hard commits you have for that day. Hard commits are specific monetary commitments received that have not yet come in the door. For example, if your Director is at an event and says I have X, Y, and Z checks in hand, that is a hard commit. John Doe telling you that he will “drop a check in the mail sometime this week” is NOT a hard commit. John Doe giving you the tracking number for an overnight package with a check in it could be considered a hard commit – once you verify that the tracking number is legitimate.
      3. **Problem Checks:** any check that is a problem check (see Problem Check section).

Contribution Vetting:

* Any individual who contributes $5K or more in a calendar year MUST be vetted
  + Feel free to send contribution vetting emails for your hard commits before the $ walks in the door
  + Note- Accounting CANNOT PROCESS A CONTRIBUTION until it has passed vetting
* Any individual who hosts an event (whether at their home or part of a host committee) MUST be vetted
* Host Vetting trumps Contribution Vetting-
  + If an individual was vetted to host an event, then later contributes $5K, they won’t need to be vetted again
* White House vetting also trumps Contribution Vetting
* Vetting lasts a full year from the date vetting passed, so if they contributed $10K in September of 2013 and were vetted at that time, when they contribute $5K in January of 2014, they don’t need to be Vetted again
* A donors vetting status can be found on their NGP page, right below the email box.
  + Vetting status will list either “passed,” “expired,” “not vetted,” and “failed”.
  + You can click on the “update” box next to the Vetting Status to see what type of vetting the donor has.

Vetting emails:

* Need to be sent to the following people: Jackie Forte-Macay, Jacqui Newman, Amy Soenksen and Vania Kinard. Your regional team should be cc’d
* Subject line of the email “Contribution Vet: Donor Name and Amount IN or HC” OR “Host Vet: Donor Name and Event ”
* In the body of the email please include the following:
  + Donor Name, Address and NGP ID
  + Contribution Amount- whether it is IN or a Hard Commit
  + Employer/Occupation
  + Giving History dating back two election cycles (that is currently back to 2009)

**Problem Checks**

On occasion, contributions will be classified as “problem checks”. This means that for some reason we cannot deposit the check immediately (or if it is a credit card contribution, it is technically unlawful to have the contribution in our bank account). If this happens, we need to send a form for the donor to sign. Different problems have different forms. Examples of the different types of problems are below:

1. Signature Form – The signature on the check is illegible or it is signed by someone else.
2. Entity – When the check is from a firm (ie Smith and Smith LLC). This form ensures that the contribution is from a partnership and is not an illegal corporate contribution.
3. Trust – when the check is from a trust fund (Smith Family Trust). We only need a form when the account name and signer are not the same. A check from the Tom Smith Trust signed by Tom Smith is OK.
4. Earmarked – When a donor writes something in the memo line. Often times they will put Leader Pelosi or the member that hosted the event. These checks can’t be cashed into the general DCCC fund. The donor needs to sign a form saying that they intended the funds for the DCCC rather than a specific candidate

\*All of the forms and the explanations for each form are found at: **S:\Finance 2013-2014\Problem Checks\2013-2014 Problem Checks**

\*Note: It is not your responsibility to flag a contribution as a problem check – this is done by the Finance Operations Director and noted in the New Money email that is sent.

*The resolution process for problem checks is as follows:*

1. Identify the correct form to be completed.
2. Save over the template to make a customized version of the document this is where you plug in their name, address, check amount, date, etc.
3. Send the PC form either directly to the donor or to their assistant. If you do not know for sure the best way to contact the donor, call the donor (or their assistant) and ask for the best email to send the form to.
4. We do not need the original returned – it can either be returned via fax or scanned via email.
5. Resolving PCs can take some serious persistence – depending on the donor (and how close it is to the end of the month/quarter), it is important to follow up in the form of email and/or phone every couple of days.

**Donor Maintenance:**

For a variety of events, occasions and as “thank you” gifts, you will send orchids from Leader Pelosi. All of our orchids are ordered through Teleflora. The standard order is a white “Opulent Orchid”. Use the South Finance Director’s DCCC Visa Credit Card to process the payment. Create a new log-in with your email address and saved the credit card information. Once you have created an account, you will be able to access receipts and other information from previous orders.

* For every order you need:
  + Address of delivery – home or work
  + Contact number of recipient
  + Date of delivery
  + Message (see below)
  + The Opulent Orchid from Teleflora is supposed to be white, but I find it useful to also make a note in the order that the orchid must be white.
  + AND, make sure you save a receipt for all of these orders.
* Teleflora will start sending you emails with discount codes once you sign up. At the bottom of confirmation emails, there is a discount code in the bottom text. USE IT! Every penny counts when it comes to sending these orchids because they are expensive.
* Message:

These are the most common messages - you may need to be more specific for some messages. You should draft the message when it is a more unique situation and have your Finance Director approve the language before you send.

* + **Hosting an event**- Dear XXX, Thank you for hosting such a lovely event. Your friendship and support mean such a great deal to me. Best, Nancy Pelosi
  + **Birthday**- Dear XXX, I hope you have a wonderful birthday! Your friendship and support mean such a great deal to me. Best, Nancy Pelosi
  + **Death in the family**- Dear XXX, My most sincere sympathies and condolences for your loss. Keeping you and all your family in our prayers. Best, Nancy Pelosi
  + **Wishing well after surgery**- Dear XXX, My thoughts and prayers are with you. Best wishes on a speedy recovery. Best, Nancy Pelosi
  + **New baby**- Congratulations on the new addition to the family. I welcome XXXX to the world and look forward to meeting him soon. Best, Nancy Pelosi

***Feedback:*** ***I created a South Donor Birthday list that is saved here: S:\South\South 2013-2014\2014\LISTS. There are some anniversaries listed as well. Birthdays have been compiled from POTUS events and from word of mouth. I found it easiest to make a list of the next month’s birthdays to give to the Finance Director to decide who gets an orchid. Orchids are expensive so not everyone gets one. Order the next month’s birthday all at once so that way you’re not scrambling at the last minute.***

**Talking Points:**

Anytime you have an event that involves Leader Pelosi or the Chairman, you need to request talking points for the event. This should be done when the event is approximately two weeks out. This gives DCCC Staff Writer enough time to draft the talking points, and also allows her to look ahead at what will be politically relevant at the time of the event. You will need to give her a snapshot of the event, noting any Members of Congress, Candidates, VIP’s and event hosts so that she can write in acknowledgements, as well as the issues of interest to the audience. An event in South Texas during the children crossing the border crisis should focus on the legislative initiatives dealing with immigration reform, for example.

It is best to get something to the DCCC Staff Writer 2-3 weeks ahead of the event. Even if you only have very basic information, it’s better to send her something with holes and fill them in later. The Writer works on a lot of different talking points at one time; it is important that she knows what is needed so she can prioritize.

**Thank You Notes:**

Each region is responsible for sending thank-you notes for contributions they have received. Make sure to send thank you notes once every two weeks.

Thank you note process:

1. Pull the updated list from NGP. Search for all contributions that are tallied to the Northeast region within the specified date range. You will be able to tell when the last batch of thank you notes were sent based on the latest date on the list of recipients. For example, the last batch was sent for contributions made through October 20, 2013 and the list is saved as “ TY 10.22.14-10.30.14 ”. All thank you materials are saved here: ***S:\South\South 2013-2014\2014\TY Notes***
2. After tallying how many letters to send, make sure the materials are available. The envelopes and letterhead are stored in the front cabinets. Use “Nancy Pelosi, Democratic Leader”, paid for by the DCCC letterhead and envelopes with the DCCC return address.
3. Make sure you have the most updated thank you note template. After each quarter, the communications department approves new versions of thank you notes. It is very important to have the correct language.
4. Mail merge the exported list onto the letters and make sure that they are properly formatted for the letters.
5. Mail merge the address info onto labels for the envelopes. Again, Microsoft Office has a step-by-step mail merge wizard that guides you through the process.
6. Stuff the letters into the envelopes. Leave the envelopes unsealed and “nested” in one another. Then, head over to the mailer machine and feed through the postage machine.
   * Choose our department, Finance 606 (which will track the postage amount)
   * Choose “sealer on”

***Feedback:*** ***I found it extremely helpful to set a reminder on my Outlook calendar for every two weeks to send Thank You notes. There are times when things are slow and we don’t have any to send but it is extremely important to be on top of this.***

**Renewals**

Each quarter we do a renewal mailing. Renewals are sent by region to donors who meet certain criteria (including date and amount of contributions).

* To start a renewal mailing:
  + Pull a list in NGP of all donors who have given $500 since 2009.  Remember to remove people who have already contributed the maximum to the DCCC. The number of renewals for each quarter varies. Depending on what events are coming up in a certain state, some cities will be removed so as not to be hit up twice.
  + Have the South Finance Director go over the list as well to make sure the ask amounts are correct. These letters include a specific ask and the easiest way to do this is just to create a new column in excel so you can just merge it into the letter.
  + Ideally, the renewal mailing will be followed by a phone call from the DCCC to determine if the donor is able to renew their support to the DCCC at that time.
  + The process of creating the letters is the same as creating the thank you notes.
  + Use “Nancy Pelosi, Democratic Leader”, paid for by the DCCC letterhead and envelopes with the DCCC return address.

***Feedback:*** ***Stuffing and sending renewals is a timely process. I found it useful to start with the higher asks first, such as Speaker’s Cabinet people who need to finish their max, and include an invitation to Napa. Ask for help when stuffing because it makes the time go by much faster. ALSO, before printing, make sure there is enough of the appropriate stationary because all the regions print renewals at the same time and some region’s renewals are larger than others.***

**Call Sheets:**

Call sheets provide a clear and accurate summary of donor information and giving history.

There are 3 main portions of a call sheet:

1. **Contact Information:** make sure you have accurate contact information for each call sheet. **You will need to verify this by calling each number before it is sent for approval.**

2. **Ask/Background/Biography:** This is the portion of the call sheet that has the relevant information for the call.

1. **Ask:** This will have the main ‘ask’ for the call. The call might be for a renewal, an end of quarter ask, or an event invite. Your Finance Director will send you this information.
2. **Background/Notes:** This provides context on the relationship between the person and the DCCC and/or principal. Here you will add information regarding how long they have been engaged with the DCCC, which events they have attended, and if/when NP or the MOC has met them before. This portion jogs the memory of the MOC who is calling to make sure they remember the person they are calling. You will also add in all DCCC giving history in this section, and note whether the person attended a specific event and what amount they contributed on what date.
3. **Biography:** Make sure the information is accurate and relevant. Depending on who you are calling, you may want to include/exclude certain information to tailor to the principal calling.
4. **Giving History**: Other than confirmed contact information, this is the most important aspect of the call sheet. Export the individual’s giving history from [Political MoneyLine](http://cqmoneyline.com/tr/tr_MG_IndivDonor.aspx?&sMP=1&sText=LastName,%20FirstName&sCycle=2012). Once you have imported the giving history from the past three election cycles, calculate how much that individual has federally remaining to give to Federal Committees.

**NOTE: You will need to list giving history by year, largest to smallest, with the exception of DCCC contributions that are ALWAYS on top, in BOLD, and with the contribution source in parenthesis.**

An example of a call sheet is on the next page.

**Leader Nancy Pelosi**

**DEMOCRATIC CONGRESSIONAL CAMPAIGN COMMITTEE**

Staff: Missy Kurek (315) 373-9560

**Name:** John Ceriale

**Spouse:** Melissa

**John’s Employer**: Prospect Advisors **John’s Cell:** (917) 836-2304

**John’s Occupation:** Consultant **Melissa’s Cell:** (203) 820-4608

**Melissa’s Employer:** N/A

**Melissa’s Occupation:** Homemaker

**Address**: 230 S Ocean Blvd

Palm Beach, FL 33480

**ASK:** Please ask Melissa and John to contribute $27,400 to the DCCC at this time and invite them to join you, Congressman Deutch and Members of the Florida Congressional Delegation for a dinner with President Obama in Miami on Thursday, March 20th.

**February 2014:** Melissa contributed $5,000 to the DCCC through a reception with you hosted by Congresswoman Lois Frankel and Mei Sze (MAY-SEE) and Jeff Greene at their home in Palm Beach, FL. John was not able to attend as he was out of town. Congresswoman Frankel raised this contribution.

**NOTE: Melissa also raised $5,000 from her friend Christine Hall, who attended the event as well. Christine and her husband Andrew Hall have the potential to give at the Speaker’s Cabinet level. The Halls had not given politically before but are very wealthy and have the capacity to make large contributions.**

**DCCC Dinner with YOU, President Barack Obama, Congressman Deutch**

**and Members of the Florida Congressional Delegation**

**Thursday, March 20, 2014**

**The Home of Tracy and Alonzo Mourning**

**6342 SW 109th Street**

**Miami, FL**

**Honored Guest- $32,400 per couple**

**Guest- $16,200 per person**

**Giving History for John**

|  |  |  |
| --- | --- | --- |
| **2013** | $5,200 | Lois Frankel For Congress |
|  |  |  |
| **2012** | None |  |
|  |  |  |
| **2011** | None |  |
|  |  |  |
| **2010** | $4,800 | Bennet For Colorado |
|  |  |  |
| **2009** | None |  |
|  |  |  |
| **2008** | None |  |
|  |  |  |
| **2007** | $10,000 | DSCC |

**Giving History for Melissa**

|  |  |  |
| --- | --- | --- |
| **2014** | **$5,000** | **DCCC (March – Palm Beach Reception)** |
|  |  |  |
| **2013** | $5,200 | Lois Frankel For Congress |

*\*no previous federal giving history*

**Prospecting**

Prospecting is one of the most important roles of the Finance Assistant. This is an on-going project to identify new donors and those who have capacity been contributing to the DCCC significantly below their giving capacity.

Prospecting is based on researching individuals who have a high likelihood of contributing significantly to the DCCC based on demographic and giving history and strategizing the best way to reach out.

[Political MoneyLine](http://cqmoneyline.com/tr/tr_MG_IndivDonor.aspx?&sMP=1&sText=LastName,%20FirstName&sCycle=2012) is an online database of political contributions based on FEC filings and publically available information and great resource for prospecting. It has search functions for individuals, campaigns, parties, PACs, committees, zip code and other variables. It is a great tool to pull lists of donors to a MOC campaign to get ideas for call sheets, to see who was contributing to certain races and looking at a donor’s previous giving as a way to gauge their capacity.

Other places to look for new donors are host committees on invitations, boards of non-profit organizations and foundations. Your prospecting bible is the South Master Prospect list. All of you research should begin there. It is saved here **S:\South\South 2013-2014\2014**

* MOC Individual Donors: This cycle we’ve already gone through many lists of donors to different candidates. Although it is easy to export these lists from [Political MoneyLine](http://cqmoneyline.com/tr/tr_MG_IndivDonor.aspx?&sMP=1&sText=LastName,%20FirstName&sCycle=2012), it is good to check what lists have already been downloaded and worked with. Often time, there are working notes and important information noted in these documents which can be helpful when prospecting. They are saved here: **S:\South\South 2013-2014\2014\LISTS**

***Feedback: The South Maser Prospect list is a beast of an excel sheet and can be extremely frustrating at times. However, it is extremely important to keep it updated, especially the Texas and Florida tabs. It’s a good project to do when things are slow and you can dedicate a good amount of time to it.***

**Event Guidelines:**

Every event starts out differently. Some events are hosted annually and others are events that are completely new. You will work with the South Finance Director to ensure the hosts are happy, that they understand their raising obligations, and have realistic expectations about what an event with Leader Pelosi entails. You will work with your Finance Director to complete the following steps for a successful event:

1. Fill out a scheduling request. For new events that Missy has signed off on, you have to complete a scheduling request which is sent up to the Leader’s official office.
   1. This has the event details which include date, time, location (if applicable), hosts (if applicable), purpose, size, etc.
   2. One approved, send a Long Term Update to the Finance Operations Director (see Long Term Update section)
2. Send Vetting for the Host
3. Create invite. Follow the protocol very carefully when sending invites and/or changes to invites. There is a multitude of people and departments who must approve the layout, language, order of Members listed, etc. Follow the protocol outlined in the DCCC Finance Training manual to ensure that this is done correctly. NOTE: The sooner you get your invite approved (and this can take up to a couple of days), the sooner you can start promoting your events and raising money.
4. Create website. The Finance Director of Operations will send to the digital team who will create an RSVP page for attendees to contribute online. The request needs to include the following:
   1. URL
   2. Header
   3. Description
   4. Date & Time
   5. Location
   6. Contribution Levels
   7. Date Needed By
   8. Contact Info
   9. Emails for Contribution notifications
5. Target your attendees based on location and audience size (your Finance Director will give you direction here)
6. Send out invites by email, and where applicable, by ground mail.
   1. You will be in charge of printing, stuffing and mailing. Your Finance Director will email out the invitation.
7. Call through invite list.
   1. For large events, ask for help from the other assistants. Otherwise, it’s just crucial to get through the top of the list.
8. Talking points request.
   1. Send to Speech Writer as soon as the event is confirmed.
9. Briefings for Leader Pelosi and Members of Congress in attendance
10. Create attendee briefing for Leader Pelosi
    1. There is a very specific way that Leader Pelosi likes her attendee briefings. These take awhile to edit, so the sooner you can send up to edit the better.
11. Keep RSVP spreadsheet up-to-date with attendees and money in
    1. This is the responsibility of the South Finance Director.

A couple of days prior to your event, you will need to organize certain items to ensure the event runs smoothly. It is also your responsibility that event materials are gathered and prepared.

* Briefings:
* NP Main Briefing
* NP Attendee Briefing
* Member Briefings
* Event Cards
* Remarks (2x)
* Event Spreadsheets (2-3x)
* Accessories
* Name tags
* Name tag inserts (plus extras)
* Name tag holders (plus extras)
* Escort cards (2x)
* Click cards
* Table tents
* Table Numbers
* Extra NP card stock
* Misc/Additional Supplies
* Extra pack of note cards
* Remit/contribution forms
* Big white envelops (3)
* Problem check forms
* Sharpies, Pens & Pencils
* Any specific literature/materials that NP/leadership wants to have at the event

***Feedback: Start hoarding the event supplies once you start to get a feel for how much you’ll actually need. And remind the South Finance Director to bring back the used nametags. The nametag holders are expensive and it’s always easier to reuse than to purchase new ones. If there are multiple events coming up for all the regions, put together a list of all the supplies everyone will need and send to the COO’s Assistant to place a Staples order.***

**Long Term Update**

The Finance Operations Director keeps track of the Leader Pelosi’s Long Term Schedule. This document should never leave her area, as it is a security risk for Leader Pelosi should that information be released. It is important to check the Long Term calendar regularly for accuracy and to make sure that all event details are accurately reflected.

Process:

* Email the Finance Operations Director and cc Missy and the National Finance Director, and your entire team
* Subject: **Long Term Update** 
  + This is important. It should say nothing more and nothing less than this.
  + Body: Relevant info only. They need to be able to read this quickly and pick out only what needs to send up. The changes need to be made clear- put them in red, it’s important to clearly indicate what exactly the update is.
  + Your job is to fill in the holes as you have the information!
* Every event needs the following details:
  + Location (Name of location, Room, Floor, Suite #, exact address and zip code)
  + Details:
  + -Attendees (Total # and VIPS (Members, candidates etc) confirmed to attend)
  + -Reservation information (# and name it is under)
  + -Event run time (for events, not meetings)
  + Timeline that is exactly what you put in your briefing)
  + Staff (Missy, National Finance Director, etc, with cell phone number)
  + Site Contact - this is the SITE contact- someone at the office, hotel, event space that can give details to NPs security team. This is the person the security detail will call to do the walk-thru of the event. This is important.
  + Contact- For finance meetings only, a contact number for the person NP is meeting with

**Shell of Event:**

TIME: TITLE

Location:

Details: (Tic Toc)

- Event Run Time =

- Attendees = TBD/Reps. X, Y, and Z

Staff:

Site Contact:

Contact: (if a finance meeting)

This is how it will look completed on the Long Term:

**Friday, June 27, 2014**

**4:30pm – 5:00pm**

**DCCC Finance Meeting with Russell Budd**

Location: Crescent Club Dining Room

Rosewood Crescent Hotel, 400 Crescent Court, Dallas, TX 75201

Front Desk: (214) 871-3200

\*Reservations under Missy Kurek for 2

Site Contact: Daniel Ovichegan, (214) 953-4386

Attendees: Russell Budd, cell: (214) 729-6265, & Jennifer Kinder, Budd Political Director, cell: (214) 717-0128

Staff: Missy Kurek, (315) 373-9560 (c)

***Feedback: For this past cycle, the South Finance Director had a rolling calendar that she kept updated so this was primarily her responsibility. However, depending on how next cycle’s South Finance Director divvies up responsibility; this is easily something that the Assistant can do.***

**Briefings for Leader Pelosi and Members of Congress**

This is a shared responsibility. Before every event, you will have to go through a checklist and make sure you have the following briefings completed: a Main Briefing, an Attendee Briefing, an Event Card, and a Thank You Memo.

* **Main Briefing** - For a “Main Briefing,” the event information is listed in detail. This includes the background of the event, why the particular Member who the briefing for is attending, and specifics about the layout and timeline of the event. It will also include a detailed biography of the hosts, notes of their past involvement with the DCCC, and their giving history from 2008-present. Additionally, the biographies of each Member attending will be in the briefings that go to the Leader or the Chairman, and this will also include any information about their DCCC Dues giving for the cycle.
* **Attendee Briefing** - For an “Attendee Briefing,” which includes a brief biography and giving history of each attendee, two liners need to be updated and approved for each event and they also provide a helpful snapshot of donor’s activity in past cycles. Also be sure to pair together an individual and their partner, so whoever reads the briefing will know that they’re together. An example of a two liner is below:

**Lynda and Art Brender –** Art is an attorney in Fort Worth. Art has tried and won hundreds of cases throughout Texas involving personal injury, products liability, insurance bad faith, civil rights, medical negligence, mass torts, class actions, sexual harassment, and employment discrimination, including two cases before the United States Supreme Court: Watson v. Fort Worth Bank & Trust and Trevino v. Texas. In 2012, Art obtained a settlement against the manufacturers of a vitamin E supplement, called E-Ferol, which was given to premature infants in 1983-84, and resulted in infant deaths and brain damage, after a seven-year court battle. Art’s wife, Lynda, is the bookkeeper for the law firm. Art and Lynda have been married for 42 years and have three adult children. ***In January of this year, Lynda and Art renewed their Speaker’s Cabinet membership with a $32,400 contribution. Lynda and Art are scheduled to attend your Napa Valley Weekend in August, which they attended in 2012 and 2013. In April of this year, Lynda contributed $200 to the DCCC Recount Fund. In December 2013, you sent an orchid to Lynda and Art congratulating them on their 45th wedding anniversary. In May 2013, Lynda and Art attended the DCCC Luncheon with you hosted by Rep. Veasey in Fort Worth and a DCCC dinner hosted by Marc Stanley and Joan & Terry Oxford in Dallas. In January 2013, Lynda and Art renewed their Speaker’s Cabinet membership with a $32,400 contribution and attended the 2013 Inauguration Luncheon. In April 2012, Lynda and Art joined your Speaker’s Cabinet, contributing $30,800 to the DCCC, and attended a dinner hosted by Wendy and Marc Stanley, Lisa Blue Baron and Veronica Roth & Dick Sayles in Dallas. This was their first contribution to the DCCC.***

* Event Cards - “Event cards” will be different sizes depending on whether they’re for the Leader or the Chairman. These cards usually include a timeline of the event and the names of anyone they are going to need to acknowledge, such as VIPs or Members in attendance.
* Thank You Memo - The “Thank You Memo” is a memo only used for Leader Pelosi. This lists any hosts and Members that the Leader will want to thank for their participation in an event. Make sure to list the individual as well as their partner or spouse so the Leader can also thank them too. Also be sure to list more than one number, if possible, and to verify each number before it’s listed. This is also where you let the Leader know who will be receiving an orchid and when.

**NOTE:** There will be a deadline for when these materials need to be completed AND approved by. This deadline is set by Leader Pelosi’s office and can be anywhere from 1-4 days before an event. The Finance Operations Director will send around these deadlines as soon as she is aware of them. You must do your very best to have all of the materials approved by this time, at which point you send the final versions to the Finance Operations Director, who then “sends them up” to Leader Pelosi’s office. You can still send updates to the materials after they are “final”. It is also important to send the materials to the National Finance Assistant so he or she can print out and prepare Missy or the National Finance Director’s folder.

***Feedback: I have found that as soon as people start RSVPing for an event, create an attendee briefing. It’s a lot easier to add names as they RSVP than it is to create all the two-liners at the end. I also found it beneficial to even do the two-liners for people who are considered “maybes” because it is easier to delete a two-liner than it is to create one.***

**Visa:**

The South Finance Director has a DCCC authorized VISA Credit Card. This card is used for travel, donor meetings, orchids, and any number of other work related expenses. You will have the credit card number on file, and will regularly book travel, buy and send orchids, etc.

Each month, the accounting department will bring you a physical spreadsheet as well as an electronically copy of the Credit Card purchases for the previous month. It is your responsibility to fill out the excel spreadsheet with the allotted fields (source, description, account, amount, address, etc), and compile hard copies of each receipt to give to the accounting department. Accounting keeps track of what each department spends per month, and they also subtract event expenses from the overall fundraising event total to ensure that we are within our budget. For reference, you can look in the below folder to view previous month’s completed CC statements, as well as look over the department and accounting codes, which you will be required to add to the electronic copy of the CC statement.

***S:\South\South 2013-2014\2014\Expense Records***

**SPECIAL EVENTS – POTUS**

The South Region was lucky enough to have three events with President Obama in 2014. These were very special events and required a lot of work, time and lack of sleep. Each event was different and challenging in their own way. For as difficult as these three events were, I will never forget working and attending them and that I am so proud to have been a part of them. The South Finance Assistant rarely travels during a “normal” cycle however when it comes to the Presidential events, it’s all hands on deck.

* **Miami** –This event was a month after I had started and I was extremely overwhelmed. However I learned so much about the politics of Florida members, how territorial Members can be in regards to specific high dollar donors and at the end of the day, money is money even if it wasn’t the amount you asked for.
* **Houston** – This was a joint event with the DSCC benefitting the House Senate Victory Fund. Learning how to work with the DSCC and raising money into the joint fund was tricky. This event opened my eyes to the fact that donors prefer certain committees over others and it taught me how to sell giving to the joint fund rather than giving to one committee over the other.
* **Dallas** – Out of all the POTUS events, this was the most difficult. It took place the Wednesday after 4th of July weekend and donors weren’t responding until the last minute. The host for the event really pulled through and the majority of attendees were people that he reached out to. This was the first big event that showed me how important it is to have a superstar host to help with raising the money when we have done everything that we can.

**DEPLOYMENT – NJ03**

The majority of the Finance Assistants are sent to races that need help. I was sent to Aimee Belgard’s race in New Jersey’s 3rd district. As nervous as I was, it was one of my the best experiences while working at the DCCC. It was my first campaign, my first time in New Jersey and there were horror stories about how campaigns don’t like the DCCC staffers that come out to help.

Belgard’s staff welcomed me with open arms and was extremely grateful that I was there to help out. They wanted my opinion on events, certain national donors and other local candidates that were in difficult races. I staffed call time with Aimee for hours on end, double dialed in the call time room, wrote follow up emails and event briefings, made staff calls to low dollar donors and I was the “go-to” person for volunteers to talk to and pass their message on to Aimee.

* **Event with Vice President Biden** – The Belgard camp had 6 days to raise money and organize an event with the Vice President. I was in charge of keeping track of vetting, asking all the appropriate questions for Secret Service, and following up on all of the “maybes” Aimee received in call time. It was an extremely stressful week because it overlapped with Columbus Day and many people weren’t answering their phones (similar situation as the Dallas POTUS event). It ended up being successful but it definitely could have been better if it had been scheduled for a different week.

**FEEDBACK**

**Lessons learned**

* I knew before I started that fundraising was a very detail oriented profession but working for the DCCC raises the bar in regards to being extremely detailed and organized. The Leader and Chairman like things certain ways and have high standards for their staff. Double checking just won’t do it…triple, quadruple check things because as annoying as these standards are, they really help with keeping the finance department running smoothly.
* In reference to the above bullet point, there is no such thing as a dumb question. I learned that I would rather ask a minuscule question or re-ask a question, then do something wrong. It might be annoying to your Director, but I’d rather be annoying than do something wrong on a briefing or phone call. Also, asking questions about donors and donor relationships are very important in the South. It might be a long story but it’s important to know the history of some of these donors so as not to offend them for future events or meetings.
* You will spend a lot of time with the people in the Finance Department. They will become family. Some days you love them and some days you wish they’d just go away. Rely on them. Ask them for help and advice. The experiences of your co-workers are priceless and extremely helpful. Take advantage of what they have to say, who they know, and the mistakes they have made so you don’t have to.

**Feedback on this position**

* The South Finance Director and I worked really well together. We balanced each other out. She taught me a lot about my position because at one point she was the South Assistant. Only having two people on our team meant that I had more responsibilities and duties than other assistants which I took advantage of. I had the opportunity to do call time with a couple members and work on three events with the President that I know other assistants didn’t have the same opportunity.
* I learned more about myself, my fundraising abilities and the importance of the money we raise for the DCCC after being deployed to New Jersey’s 3rd than I would have if I hadn’t been deployed. Every dollar counts on a campaign and it made me really appreciate the low dollar checks we raise.
* I wish the South Director and I discussed and timed the events in a way that I would have had a chance to take charge of an event before I was deployed. Although I didn’t have the opportunity, I feel as though my Director prepared me enough to handle an event on my own and I’m just bummed I didn’t have a chance to show her.

**Tools that were helpful**

* Finance Assistants – I asked for help and relied on the other assistants a lot when I first started. And they asked for my help and relied on me when they were extremely busy as well. Start an “Assistant Chain” email…fastest and easiest way for you to ask for help and give help without having to go to each region.
* Political Money Line and Wealth Engine – With events in states we don’t necessarily go to that often, Political Money Line helped with finding new donors and Wealth Engine really helped in prospecting. Probably the two most used websites by Finance.
* [Culture Map Houston](http://houston.culturemap.com/) and [Culture Map Dallas](http://dallas.culturemap.com/) - The social scene websites for those cities. They were very helpful in prospecting donors and figuring out who was who in certain social circles. They were also helpful in learning about what causes are important to our Speaker’s Cabinet donors and what’s going on in the city so the Leader would know what to mention when talking at events or in meetings. It’s also great in finding current pictures of donors for briefings.

**Interaction with other departments**

* When I started, my desk was located in the South Pod. I sat in between the South Field Director and the South Researcher. I learned a lot about the Southern states just from listening to them all talk to each other. However, after I moved desks, I lost touch with what was going on, except with what was being emailed by the South Comms person.
* The South Pod, while I was sitting in it, wasn’t that close compared to the other regions. I know the restructuring was supposed to help with strengthening region relations, but from what I saw, I don’t think the South Pod interacted much outside of work.
* I had very little interaction with the other departments. I was not deployed to FL13 so I didn’t have the opportunity to get to know people from other regions or departments. My relationships with people outside of Finance are from going to Staff Happy Hours and going to birthday events of DCCC staffers.