FROM: Hannah Bruce, West Deputy Finance Director, (202) 485-3532

DATE: December 1, 2014

SUBJECT: West Deputy Finance Director, End of Cycle Memo

**OVERVIEW**

The 2013-2014 West Finance team included a Director, Deputy Director and a Finance Assistant. There are also two finance consultants, Lisa and Terri that work very closely with the West Regional team in San Francisco and Los Angeles respectively. The West Director will work closely with Lisa and Terri, but the Deputy will also work with them on California events and meetings. The West Regional finance team was responsible for high-dollar individual fundraising in Arizona, California, Colorado, New Mexico, Nevada, Oregon and Utah. The region also includes Idaho, Wyoming, Alaska and Hawaii, but there were no events held in these states. In 2013, the West was also responsible for fundraising in Washington, but the Midwest took over the state when two Presidential events were held back-to-back in Seattle and Los Angeles.

The West Deputy is responsible for assisting the West Regional Director with day-to-day operations as well as taking the lead on their own fundraising events throughout the region. During the 2014 cycle, the West Deputy was responsible for events in Arizona, Colorado, Oregon and for securing meetings in Utah. The West Deputy also works closely with the West Director to ensure that major fundraising events in California are successful.

During the 2013-2014 calendar year, there were annual events held in Arizona, Colorado, New Mexico, Oregon and an annual trip to Utah for a day of Speaker’s Cabinet finance meetings with Leader Pelosi. The West Deputy is also responsible for assisting the Director with quarterly renewal mailings and donor maintenance, including making sure all thank you, birthday, congratulatory, etc. orchids and thank-you notes from Leader Pelosi are sent in a timely manner

As a Deputy, planning an event start to finish will be one of your responsibilities. A quick overview of the event planning process is outlined below.

**Event Planning Process**

* Confirming dates with the Leader’s Office, Hosts, Members of Congress and any applicable raisers.
* Generating a plan to hit the event’s fundraising goal
* Drafting and working on invitations and pushing them through the approval process
* Creating the fundraising solicitation lists and sending out mailings, overnights, & emails
* Engage applicable Members in event and send targeted callsheets if they agree to raise
* Calling through our donor lists to make sure they received the invitation and to give a personal invitation via phone to attend the event
* Sending personal emails & overnights to top contributors who normally don’t respond to blast email solicitations
* Keeping an updated commit sheet to inform department heads of where the event stood at all times
* Prepare all talking point requests, background briefings (including donor capacity), financial spreadsheets, and thank you briefing
* Follow up on any problem checks that come in at the door (Finance assistant can help with this)
* Make any follow up calls/emails needed for checks that didn’t come in at the event
* Send a thank you Orchid from Leader Pelosi to hosts and Members that raised

**REGIONAL EVENTS RECAP**

**Arizona**

**Sperling Dinner (March 2013/ April 2014)**

The Deputy is responsible for all major fundraising events and Speaker’s Cabinet meetings in Arizona. Traditionally, the DCCC has held one fundraising event, typically a dinner, in Phoenix, AZ at the home of Dr. John Sperling. **\*Please note: Dr. Sperling was a close personal friend of Leader Pelosi. He passed away on** **August 22nd, 2014.** **Leader Pelosi attended his funeral.**

Bill Roe, the Chairman of the Arizona Democratic Party, and Sam George, a colleague and friend of Dr. Sperling, are instrumental to the success of the DCCC Phoenix Dinner. Bill Roe and Sam George help raise contributions for the event, and also personally contribute speaker’s cabinet level contributions to the DCCC to ensure the event reaches its $100,000 goal. The West Deputy should also coordinate with the Midwest Finance Director, who is responsible for raising Tribe money. There are a handful of Tribes that like to attend this dinner, and contribute to the DCCC at the Speaker’s Cabinet level. Support from the Tribal community in Arizona is essential to reaching the event goal.

Many Members in the Arizona delegation were also very helpful raising for this event. In particular, Congresswoman Kirkpatrick, Congresswoman Sinema and Congressman Barber all reached out to their network of donors on behalf of the DCCC. All three are DCCC Frontline Members so it’s important not to ask their teams for too much, but they all have a good network of donors that can (and should) become engaged with the DCCC.

In 2013, the DCCC Arizona dinner raised $244,000. In 2014, the dinner raised $222,000 for the DCCC. To schedule this event in 2015, the West Deputy should reach out to Sam George early in the New Year. With the death of Dr. Sperling, there may be some changes to how the Arizona event is structured, but Sam is your best point of contact. Going forward, it could be worth exploring with Sam alternative host possibilities. Congresswoman Sinema, Congresswoman Kirkpatrick and Congressman Barber’s teams may also have good ideas of new people that could become engaged with the DCCC and have the capacity to be good hosts.

**Colorado**

Typically the DCCC will hold two annual events in Colorado, one in the early Spring and one in the Summer.

**Ergen Dinner (March 2013 / April 2014)**

Cantey and Charles Ergen, Speaker’s Cabinet donors in Denver, host a small annual dinner at their home. The Deputy should work with Stanton Dodge, Executive Vice President and General Counsel of DISH Network, to put this event together. Stanton also raises all of the contributions for this dinner. Stanton typically agrees to raise between 100-120K for the DCCC through this event through a combination of individual and PAC money. Stanton will raise a Speaker’s Cabinet contribution from the Ergen’s annually as well as a $15,000 PAC contribution from DISH. The rest he raises from his network in Colorado and across the country. Stanton is incredibly reliable and will always be upfront and honest about who he’s raising from and when the checks can be expected.

Stanton is the sole raiser for this event, but Members of the Colorado Democratic Delegation are invited to attend the dinner at the request of the Ergen’s. If time allows in Leader Pelosi’s schedule, the Deputy is also responsible for filling individual finance meetings. Members of the delegation can be helpful in reaching out to their network to fill these meeting times.

In 2013, the Ergen dinner raised a total of $125,402. In 2014, the Ergen dinner was cancelled at the last minute due to a change in the Ergen’s schedule. However, Stanton still raised $122,200 for the DCCC despite the cancellation. Candy Ergen met privately with Leader Pelosi in August 2014.

To schedule this event in 2015, the West Deputy should reach out to Stanton Dodge early in the New Year to figure out a date that would work best for the Ergens. Typically this event is held back-to-back with the DCCC Arizona dinner (see above).

**Jared Polis Majority Fund Events (August 2013/ August 2014)**

Congressman Polis hosts an annual event in August to benefit the Jared Polis Majority Fund, a joint fundraising committee between the DCCC and Jared Polis for Congress. 100% of the contributions raised towards the Jared Polis Majority Fund events are attributed to the DCCC. Congressman Polis and his team organize a low dollar reception followed by a high dollar dinner in Boulder, CO. Kate Siegel, Congressman Polis’ National Finance Director, will help secure hosts for the dinner and will work closely with the West Deputy to raise all the contributions for these events.

In 2013, Congressman Polis hosted the high-dollar dinner at this home and in 2014, it was held at the home of Linda Shoemaker and Steve Brett. Like all other events, it’s best to encourage the Congressman’s team to ask someone who can contribute or in-kind to host as it helps add to the event goal.

Congressman Polis is typically the only Member involved with this event. He will do calltime here in DC with the West Deputy in order to secure hosts and contributions to reach the event goal. It is Congressman Polis’ discretion which other Members of the delegation or candidates are invited to attend. Regardless of whether other Members of the CO delegation are invited to attend, it is a good idea to give their staffs a heads up that the Leader will be in CO.

It’s important for the West Deputy to maintain a good working relationship with Congressman Polis and his team. Congressman Polis has a great network of high net-worth donors in Boulder and Denver that should be kept engaged with the DCCC. Going forward, it would be worth exploring with Kate whether the low-dollar reception is worth Leader Pelosi’s time since it doesn’t add much to the over-all money total of the trip. The Deputy is also responsible for securing high-dollar finance meetings if Leader Pelosi’s schedule permits. The Deputy should coordinate outreach for these meetings with Rep. Polis’ team.

In 2013, the low dollar raised $21,500 and the dinner raised $62,500. In 2014, the low dollar raised $16,200 and the dinner raised $184,200. The Deputy should reach out to Congressman Polis’ Finance Director, Kate Siegel, to schedule this event. As mentioned above, it would be worth having a discussion with Kate about whether having the low-dollar component is beneficial to the overall trip since the 2014 raised over $100K on it’s own.

**New Mexico (August 2013)**

The Deputy is responsible for managing all of the fundraisers and meetings for individual donors in New Mexico. New Mexico has a large Native American population so working and coordinating with the Midwest Team in this state is very important. In 2010, the DCCC had a very successful individual high dollar fundraiser and Tribe event. This proved to be more difficult to duplicate in 2011, 2012 and 2013. In 2012, a surrogate (Congressman Jim Moran) was sent on behalf of the DCCC and he was very successful in securing Tribe contributions for the DCCC. There was no individual component to this trip. In 2013, Congressman Lujan hosted a DCCC dinner at the home of Karen & Stephen Durkovich in Santa Fe, but again, the event did not reach its goal. Leader Pelosi did two finance meetings while she was in Santa Fe, which did prove to be successful. Leader Pelosi did not travel back to New Mexico in 2014, since it was unlikely the trip would be worth her time given what was raised in 2013.

Congressman Ben Ray Lujan and his staff in New Mexico are very helpful and are eager to help raise for the DCCC. Congressman Lujan completed hours of calltime for this event to make it a success. The Deputy should contact Congressman Lujan’s staff to see what they think is possible for a 2015 fundraiser in New Mexico. Congressman Lujan and Congresswoman Lujan Grisham do have a network of donors in New Mexico, so the Deputy should keep the state in the fold going forward.

This event can often be challenging. Despite the Congressman’s hard work, there aren’t many high-dollar targets in New Mexico, and donors tend to be focused on the State rather than the National big-picture of the DCCC. Going forward, it would be helpful to get Congresswoman Lujan Grisham if Congressman Lujan is ok with that as she also has a good network of donors in the state.

In 2013, this event raised $45,000 for the DCCC and then another $42,400 was raised through one-on-one meetings with Leader Pelosi in Santa Fe. Sallie Bingham contributed $32,400 and Marty Small contributed $10,000 in January 2014 (more information below in donors section).

Next year, the Deputy should work closely with Congressman Lujan’s staff to see if there is any way to build on the DCCC’s fundraising efforts in New Mexico, especially since Mr. Lujan will be Chairman in 2015.

**Oregon (September 2013/ September 2014)**

Congresswoman Bonamici has hosted an annual event in Portland, OR since she won special election in November 2011. The event is usually held during the August recess or in early September. It has typically been a dinner of approximately 50 people and raises $100,000 for the DCCC. Congresswoman Bonamici has a great team and she works very hard by making a lot of calls to reach the event goal. In 2014, the dinner included a DCCC political update presentation at the request of Congresswoman Bonamici.

Congresswoman Bonamici shoulders the majority of the effort in raising for this event and reaching goal, but at her request, other Members in the Oregon delegation are invited to attend the event. Congressman Blumenauer in particular has a strong network of donors in Oregon, and should be asked to help raise for the event. The best approach is to send his team a list of very targeted calls once he agrees to help.

In 2013, this event raised $85,200 for the DCCC and Stan Amy contributed $32,400 through a one-on-one finance meeting with Leader Pelosi. In 2014, it raised a total $104,300 for the DCCC, $37,500 in Member Dues and $47,500 in candidate contributions for a total of $189,300 .

The West Deputy should reach out to Congresswoman Bonamici’s chief, Rachael Bornstein, and district director, Abby Tibbs, and Campaign Manager, Evyn Mitchell, to get this event scheduled in 2015. The Congresswoman’s team often worries about not being able to meet the 100K event goal, so it’s important for the Deputy to be prepared for early conversations about existing and prospective donors in Oregon. Have a clear plan for how the Congresswoman can reach her raise goal before the conversation starts. The Congresswoman’s team is incredibly hard working, and they strive to make this event a success for the DCCC.

**Utah (January 2013)**

In January 2013, Leader Pelosi travelled to Salt Lake City, UT for the Sundance Film Festival and did a day of DCCC Finance Meetings, which proved to be incredibly successful. Great new donor relationships were created. The West Deputy should be sure to maintain these new relationships and keep the donors (see major donors section) engaged with the DCCC. The Leader did not travel back to UT in 2014, so big national events like the New York City Issues Conference and Napa were good ways to keep these donors engaged with the DCCC. If it’s possible in 2015, the Deputy should get a day of meetings in Salt Lake City included in Leader Pelosi’s travel schedule.

**SPEAKER’S CABINET DONORS**

**Arizona**

**Dr. John Sperling**

Dr. Sperling is a close personal friend and has hosted the DCCC Arizona Event at his home for the past few years. He was also an annual DCCC Speaker’s Cabinet member. \* **Dr. Sperling passed away on** **August 22nd, 2014.** **Leader Pelosi attended his funeral.**

**Jim Pederson**

Self funded his 2006 Senate race putting in upwards of 10 million dollars. Jim has been helpful to the DCCC for the last three cycles as a Speaker’s Cabinet Member. Jim met with Leader Pelosi on October 10th in Phoenix, AZ and contributed $32,400 as a result of that meeting. The best way to get Jim’s money is through a one-on-one meeting with the Leader.

**Bill & Alice Roe**

Bill serves as Chairman of the Arizona Democratic Party and he is very focused on that. He will continue to be helpful to the DCCC and will renew his DCCC Speaker’s Cabinet membership around the DCCC Event in Phoenix. Bill typically attends the Leader’s Napa Valley Weekend in August.

**Sam George**

Sam takes a lot of donor maintenance, but will definitely continue to support Leader Pelosi and the DCCC. It’s imperative that the Deputy create a good working relationship with Sam, in order to secure his Speaker’s Cabinet contribution. In 2014, Sam did not contribute at the Speaker’s Cabinet level. He personally contributed $12,500 this year. A relationship with Sam is also essential to the success of the DCCC Arizona Event. Sam always enjoys attending the Leader’s weekend in Napa, so the deputy should make sure he’s aware of the event as soon as the 2015 date is announced. **\*The Deputy should reach out to Sam early in 2015 to figure out what the DCCC Arizona event will look like going forward following the death of Dr. Sperling.**

**David Higgins**

David just came in to the donor scene in Arizona having contributed $100,000 to House Majority PAC this cycle in support of Kyrsten Sinema and Ann Kirkpatrick. David met with Leader Pelosi in April 2014 and contributed $32,400 to the DCCC as a result. A one-on-one meeting with the Leader is the best way to secure his contribution, however in 2013, he reached out to DCCC staff asking how he could help and contributed $30,000 as the result of staff outreach.

**Roma & Ray Witcoff**

Roma & Ray are DCCC Speaker’s Cabinet members and they usually contribute as the result of the one-on-one meeting with Leader Pelosi. Leader Pelosi met with Ray and Roma in Phoenix, AZ in April 2014. Roma contributed $32,400 to the DCCC as the result of that meeting. \*Please note: Ray suffered a stroke a couple years ago and his health is deteriorating. The Deputy should be sensitive to that when reaching out to Roma.

**Rodney Glassman**

Rodney is an attorney based in Phoeniz, AZ and has the capacity to be a DCCC Speaker’s Cabinet member. Chairman Israel met with Rodney in April 2014. DCCC staff followed up with Rodney to see if he would contribute to the DCCC, but he never did. It is probably not worth the Chairman’s time to meet with him again, but the Deputy should try and keep him involved – invite him to events, etc.

**Colorado**

**Bill & Gracie Carr**

Bill and Gracie Carr are lapsed Speaker’s Cabinet donors, but have the capacity to contribute at a high level to the DCCC. They split their time between San Francisco and Denver. The Deputy should work with Congressman Polis and his team to see if the Carrs can be brought back into the fold. They should get invites for all events in San Francisco as well as Colorado.

**Kim Jordan**

Kim is a new Speaker’s Cabinet donor to the DCCC as of August 2014. Kim is the CEO of New Belgium brewing and it’s important for the West Deputy to keep her engaged with the DCCC. Kim splits her time between Fort Collins, CO and San Francisco so she should get invitations to all SF events in 2015.

**Pat Stryker**

Pat has been a DCCC Speaker’s Cabinet Member since 2013. The best way to get her to renew support is through a meeting with Leader Pelosi. However, in 2014 she contributed $32,400 as the result of a call from Congressman Polis.

**Currie & Tom Barron**

Currie & Tom are also Speaker’s Cabinet prospects, and would be a good meeting for the Leader Pelosi. Tom contributed $10,000 to the DCCC in 2014 at the request of Congressman Polis, but did not attend the Jared Polis Majority Fund Dinner. It is always worth seeing if they are available to meet with the Leader when she is in town. Congressman Polis is the best link between them and the DCCC.

**Peter Resnick**

Congressman Polis called Peter regarding the August 2014 Jared Polis Majority Fund Dinner and he contributed $10,000 to the DCCC as the result. Peter Resnick has the capacity to be a consistent high dollar donor to the DCCC, and the Deputy should work with Congressman Polis to maintain that relationship.

**Greg Hueni’s**

The best way to connect with the Heuni’s is through Congressman Perlmutter and his staff as they have a close relationship. The Heuni’s are Speaker’s Cabinet prospects, and would be a great meeting for Leader Pelosi. However, they are often not in town and have been hard to pin down in the past couple years.

**Noel & Tom Congdon**

Noey & Tom are lapsed DCCC Speaker’s Cabinet members from Denver. The best way to re-engaged them with the DCCC is through Congressman Polis.

**Merle Chambers**

Merle Chambers is a DCCC prospect with Speaker’s Cabinet capacity. She is hard to pin down and get a hold of. The Deputy should ask Congresswoman DeGette to ask Merle to meet with the Leader when she’s in Denver.

**New Mexico**

**Karen & Stephen Durkovich**

Karen & Stephen hosted the 2010, 2011 and 2013 high dollar fundraisers at their home in Santa Fe. They love hosting Leader Pelosi and should be asked to do this again in the future. They are not high dollar contributors but they generally pay for the event and make a small contribution of $1 or $2,000.

**Elise & Paul Schmidt**

Elise Schmidt is the heir to a large oil fortune and is a democrat. Paul is a republican. They could easily be Speaker’s Cabinet donors, but they are hard to pin down. In 2010, the contributed $20,000 to the high dollar fundraiser and were very interested in meeting Leader Pelosi. The best way to reach them is through a one-on-one meeting with Leader Pelosi.

**Margaret & Turner Branch**

Margaret & Turner are personal friends of the Leader Pelosi. In 2010, Leader Pelosi sat down with them and they contributed $30,000 to the DCCC on the spot. Leader Pelosi met with Margaret, Turner and Congresswoman Lujan Grisham in Washington, DC in May 2013. Margaret & Turner committed to contribute $64,800 to the DCCC, but that contribution was never received despite DCCC and Congresswoman Lujan Grisham’s efforts.

**Sallie Bingham**

Sallie is an author, playwright and publisher. Up until 2010, she contributed at the Speaker’s Cabinet level annually. In August 2013, Leader Pelosi met with Sallie in Santa Fe and she contributed $32,400 to the DCCC as a result. Sallie was not interested in renewing her support in 2014, but she should be high on the Deputy’s list of people to reach out to when Leader Pelosi travels to New Mexico.

**Constance Kaiserman Robinson**

Connie was a new Speaker’s Cabinet donor to the DCCC in 2010, and she renewed her support in 2011. In 2013, DCCC staff reached out to Connie for the DCCC New Mexico dinner and a meeting with the Leader, but she was out of town. Congressman Lujan and his staff can help gage Connie’s interest in contributing to the DCCC.

**Randi McGinn**

Randi is an attorney and she loves Leader Pelosi. Randi is currently prohibited from contributing to candidates & committees due to a post that her husband holds, but she is a great raiser. She raises from attorneys at her firm and if given enough notice before a trip, she can put together $20-$30k. This should be a Leader Pelosi call or email in order to get her engaged.

**Marty Small**

Congressman Lujan brought Marty into the DCCC fold in 2013. Marty attended the DCCC Dinner in Santa Fe and then met privately with Leader Pelosi. Marty contributed $10,000 to the DCCC as the result of that meeting and attended the March 2014 New York City Issues Conference.

**Oregon**

**Stan Amy & Christy Eugenis**

Stan was a DCCC prospect until September 2013, when Leader Pelosi met with him and Christy in Portland. Stan contributed $32,400 to the DCCC as the result of that meeting. In 2014, Stan told DCCC staff that he was focused on Oregon races and ballot initiatives and would not renew his Speaker’s Cabinet membership. Stan is close to Congressman Blumenauer, and the Deputy should try and re-engage Stan in the DCCC in 2015.

**Win McCormack and girlfriend, Carol Butler**

Win is a publisher and the biggest political donor in Oregon. His girlfriend, Carol, is a political consultant in Oregon and managed Congresswoman Bonamici’s special election. He has a bit of a tricky personality, and the West Deputy will need to work hard to keep him engaged. Leader Pelosi met with Win in September 2013 and asked him to contribute $32,400 to the DCCC. Win contributed $5,000 as the result of the meeting, and said he would contribute the rest when he was convinced the DCCC would be able to win seats in the House. DCCC staff and Kelly Ward (DCCC ED) followed up with Win. In August 2014, Win expressed interest in attending Napa and contributed $32,400. He and Carol cancelled their Napa reservation at the last minute.

**Christine and David Vernier**

Christine and David are long-time and consistent supporters of Leader Pelosi. They were Speaker’s Cabinet members in 2012, but haven’t contributed to the DCCC at that level since. In 2013 and 2014, they contributed $10,000 and attended the DCCC Portland Dinner. They do have the capacity to contribute more, but haven’t shown much willingness to do so. A one-on-one meeting with Leader Pelosi in 2015 may help with this.

**Utah**

**Lessing Stern and fiancée, Patricia Damon**

Lessing and his fiancée, Patricia, were DCCC prospects until January 2013 when Leader Pelosi met with them in Salt Lake City. They are now annual Speaker’s Cabinet members, and big fans of Leader Pelosi. They attend national events like NY City Issues Conference and Napa.

**Donna & Michael Weinholtz**

Donna and Michael were DCCC prospects until January 2013 when Leader Pelosi met with them in Salt Lake City. Donna and Michael each contributed $30,800 to the DCCC as the result of that meeting and attended the 2013 DCCC Napa Valley Issues Conference. Michael renewed his DCCC Speaker’s Cabinet membership in 2014, but did not attend a DCCC event.

**Ryan Smith**

Ryan was a DCCC prospect until January 2014. DCCC staff reached out to Ryan regarding a meeting in Salt Lake City with Leader Pelosi in early 2014, but the trip was cancelled. Ryan contributed to the DCCC anyways and joined the Speaker’s Cabinet through a combination of DCCC and candidate contributions (pre McCutcheon vs. FEC and he had reached his federal limits). Ryan is a young entrepreneur in Salt Lake City and should be kept involved with the DCCC. He attended the NY City Issues Conference and Napa in 2014.

**Eric Kamerath**

Leader Pelosi met with Eric in January 2013, and he contributed $32,400 to the DCCC many months later. DCCC staff tried to reengage Eric with the DCCC in 2014, but he was unresponsive to staff outreach. It is still worth trying to reach out to Eric if the Leader travels to Utah. His political director, Blaze, should be your point of contact.

**FINANCE PLAN**

Please see West Director exit memo.

**FEEDBACK**

The Deputy role is really what the person holding the position makes of it. There is plenty of work and events in the region, and it’s an exciting opportunity to step-up and share as many responsibilities as you can with the Regional director in order to have a successful cycle. It’s also a good opportunity to learn and develop as a fundraiser since you’re responsible for you own events.

The restructuring of the office into regional pods was a great idea and really improved the sharing of ideas and information between the regional finance team and the regional political team. However, I still felt like the Finance Department was a little isolated from the rest of the building. I think it would be helpful for members of a regional finance team to be included in bi-weekly or even monthly pod meetings with the regional political director and regional candidate service director to get a more detailed “political update.” I think it would be helpful to the efforts of regional finance team to have a more in-depth overview of what’s happening on races across our region.