Exit Memorandum

11/24/2014 11:34 AM

To: Amy Soenksen

Cc: Missy Kurek, Stella Ross, Manjiri Machak

Fr: Emma Levin

Dt: November 24, 2014

RE: 2013-2014 Northeast Finance Assistant Exit Memo

**Overview:**

The Finance Department at the DCCC is one of the larger departments in the organization. For the most part, each region is made up of a Finance Director, Deputy Finance Director and a Finance Assistant. Then there is Amy, the Finance Operations Director. She is the liaison between the Finance Department and Accounting and Compliance, as well as the point person between our operation and the Leader Pelosi’s office.

The entire Finance Department functions as a team. You will notice that during certain times of the month, different regions are busier than others. If team West (or team Midwest, South, has a San Francisco, LA and San Diego swing coming up in a week, and team Northeast is simply prepping for events that are 6 weeks away, you will be expected to help team West with whatever they may need. When you and your director have a swing with Leader Pelosi in New York, Boston, Philadelphia and Rhode Island, you CAN and SHOULD ask for help from regions that are not busy with time sensitive work to complete. Do this so that you meet deadlines ahead of schedule. Just be sure to let the Department Director know that you need help so he/she can assist in delegating responsibilities to different regions.

1. **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 Amy as PDFs. All PDFs of money will have the same title path: “LAST Name, First Name, Date, Region” [Example: “Ordway, Edwin 12-19-13 NE”]

You will be sent a High Importance email with the subject line “New Money” as online contributions come in, and after UPS/FedEx and daily mail has been received. In the body of the email, you will receive a listing of the money received (name and amount), as well as any notes if it is a problem check. Note: CC numbers will be blacked out except for the last four digits.

When you receive new money, follow the below outlined steps immediately:

* + Save a copy of the contribution PDF in the Money in folder. It is broken down by quarter and month received. So if you receive a contribution in February, you would save it in S:\Northeast\Northeast 2013-2014\Money In\2014\Q1\February

Note the source of the check – ex. “NP Meeting”, “CT Women’s Event”

Note which members to “tally” credit to in NGP

Log the money into the “Money In” spreadsheet

Log the money into the daily money chain

Log the money into NGP – Amy will show you the step-by-step process.

Make ONE copy of the transmittal and give it to Amy (Finance Operations Director)

**Organizing Shared Database:**

Each region has a folder on the shared drive (S: drive). The most important factor for the database is CONSISTENCY. This is a very collaborative effort and keeping file and folder names helps to ensure efficient production of documents.

The Northeast region 2013 folder is located here: S:\Northeast\Northeast 2013-2014

**Labeling Documents:**

For call sheets, format is: Last, First\_Caller/Principal Making Call (“Hiatt, Arnie\_NP”). Call sheets should be saved in the donor’s state call sheets folder. They are then organized by event.

For memo’s/briefings, format is: Principle -> Briefings Type -> Event, Date. Memos and briefings are saved in the specific event folder.

“NP Attendee Briefing – 3.8.2011 POTUS Dinner”

“NP Meeting Card – Mulye, Nirmal 6.15.2012”

**Money In:**

Every evening, Amy 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. The Money-In spreadsheet is saved here: S:\Northeast\Northeast 2013-2014\Money In\2014

* + - 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 NEW problem checks you have for that day. Problem checks are checks that have some sort of processing issue. This issue may be signature verification, verifying addresses, personal funds verification, or any other issue. Amy will notify you when a check becomes a problem check, and help you through the process of resolving it.

1. **Donor Maintenance:**

For a variety of events, occasions and as “thank you” gifts, you will send orchids from Leader Pelosi and bagels or wine from Chairman Israel. All orchids from Nancy Pelosi must be okayed by the Finance Director and Missy Kurek.

Orchids from Leader Pelosi:

**Message Text**: Each order type has specific language. For orders from Leader Pelosi, each message closes with: “best, Nancy Pelosi”.

1. Thanking for hosting an event *–* ***Than you for hosting such a wonderful event. Thank you for your continued friendship and support. Best, Nancy Pelosi***

2. Wishing a happy birthday- ***I hope you have a wonderful birthday. Thank you for your continued friendship and support. Best, Nancy Pelosi.***

*\* After each event with the White House, please add new Speaker Cabinet members to the overall birthday tracking list. This allows you to order all necessary birthday orchids at the beginning of each month.*

3. Wishing well after surgery/illness – ***Wishing you the best of luck for a quick recovery. My thoughts are with you. Best, Nancy Pelosi***

4. Condolences after death – ***I’m so sorry for your loss. My thoughts are with you. Best, Nancy Pelosi***

5. For 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***

Check with your director on the appropriate message for each orchid. These are the most commonly used 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 director approve the language before you send.

All gifts sent in 2012, 2013, and 2014 are documented on the Donor Maintenance chart. This document also tracks special requests, outreach and events with specific donors. For example, if Leader Pelosi attends a non-DCCC event with or at the request or a donor or other noteworthy events regarding donors. This is helpful to reference back to when making briefings and call sheets. The document is saved here: S:\Northeast\Northeast 2013-2014\Donor Research and Prospecting

**Process:** The standard order is a white “Opulent Orchid” from Teleflora. Use your 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. Make sure you have confirmed the following details with Megan:

1. Address of delivery – home or work
2. Date of delivery
3. Message

Wine -- When sending wine from Chairman Israel, order from Castello di Borghese. Email the order to [info@castellodiborghese.com](mailto:info@castellodiborghese.com) or mborghese@castellodiborghese.com. The standard order is the CabFranc or Sauvignon Blanc. Include a personal message, for example “It was great to see you. Thank you for your commitment to join our Speaker’s Cabinet. I enjoyed our time and appreciate all of your support of the DCCC. Best, Steve Israel”.

Bagels -- To send bagels from Chairman Israel, contact Rick Varone at NewYorkBagelsonline.com at 631-663-5297 (o), 516-779-3883 (c), [rick@sotninc.com](mailto:rick@sotninc.com). The standard order is Standard order is one dozen mixed bagels and one pound of plain cream cheese. More information about ordering bagels is saved here: [S:\Northeast\Northeast 2013-2014\Admin.](file:///S:\Northeast\Northeast%202013-2014\Admin)

1. **Talking Point Requests**

Anytime you have an event that involves Leader Pelosi or Chairman Israel, you need to request talking points for the event. This should be done when the event is approximately two weeks out. This gives Katie (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 LGBT event should focus on the legislative initiatives dealing with civil rights and marriage equality, for example.

1. **Thank You Notes:**

Each region is responsible for sending thank-you notes for contributions they have received. Make sure to send thank you notes in a timely manner. A good rule of thumb is to try to complete all thank you notes approximately 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 January 10, 2014 and the list is saved as “ 20140110 TY List”. All thank you materials are saved here: ***S:\Northeast\Northeast 2013-2014\Mails and Email Blasts\Thank You 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”

**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. 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.

1. **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. There is a hard copy folder labeled “Research” that contains lists and articles that can be helpful to review for new ideas.

There are many documents that already exist to use to prospect with. All of them are saved here:

S:\Northeast\Northeast 2013-2014\Donor Research and Prospecting:

* MOC Individual Donors: This cycle we’ve already gone through many lists of donors to different candidates. There are lists for SJI, Crowley, Hoyer and Meeks. 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.
* Prospecting – HMP etc: This is a list of high dollar donors who contributed to HMP in 2011 and 2012, Majority PAC, Priorities and Bridge PAC. The highlighted donors on the list are DCCC prospects and in NGP as “P-NE 2013”.
* Prospecting – Maxout 2014:This document is a helpful list of donors from the Northeast who have maxed out to a party committee throughout the cycle. It is a quick reference of possible targets and meetings for Leader Pelosi and Chairman Israel, and it lets you know how much an individual has left to give before they hit their federal giving limit. This document is saved here: S:\Northeast\Northeast 2013-2014\Donor Research and Prospecting
* Project Specific Lists: While prospecting is an ongoing project, there are many targeted lists for specific events or donors. For example, there is a list of “Indian American” prospects for the New Americas program and a list of “London Prospects”. These targeted lists are helpful work product and usually complied from prospecting research and NGP. Also, there are lists that track giving history to an entire delegation. This is particularly helpful when you’re trying to target out donors for Members during a large event, such as a POTUS event, and when you’re including a statewide congressional delegation. There is a “NY Delegation” list that does exactly this for New York State Members.
* NGP: All prospects should be entered in NGP with the main code “P-NE 2013”. If you come across someone who is a good prospect and already in NGP, add this code. Donors who have some giving history (either significantly below capacity or have not contributed in many years but have been maxing out to the DNC recently, for example) can also be coded as “P-NE 2014”. This is important and very useful because when asked to pull a list of New York prospects to invite to an event, it is easy to search for “New York” AND “P-NE 2014” and you will have a great list to start with!

**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 director will fill 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.**

Giving history should be formatted as follows:

**John Doe Giving History**

\**John has $10,000 remaining to contribute to the DCCC this year*

[Each calendar year, an individual can give up to $32,400 to the DCCC.]

**2011: $30,800 DCCC (June 2011, Donor Meeting)**

$30,800 DNC

$5,000 Obama for America

$2,500 SCHNEIDER, BRADLEY SCOTT

$1,000 Khazei, Alan A.

**2010: $5,000 DCCC (August 2010, Chicago Sacks Dinner)**

$1,000 Ellsworth, Brad

$1,000 Grayson, Trey

$1,000 Thune, John

**2009: $12,500 DCCC (November 2009, Chicago Schakowsky / Sebelius Event)**

$25,000 Carnahan, Robin

$5,000 Americans United in Support of Democracy

1. **Events:**

**Guidelines:** Every event starts out differently. Some events are hosted annually and others are events that are completely new. You will work with your 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 director to complete the following steps for a successful event:

1. Fill out a scheduling request
2. Create invite (Krista can help you draft an invite)
3. Target your attendees based on location and audience size (your director will give you direction here)
4. Send out invites by email, and where applicable, by ground mail.
5. Talking points request talking points requests
6. Briefings for Leader Pelosi and Members of Congress in attendance
7. Create attendee briefing for Leader Pelosi
8. Keep RSVP spreadsheet up-to-date with attendees and money in

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

The following are required event materials:

Printed out nametags of attendees

Updated RSVP lists

Pens and sharpies

Extra nametags

Extra nametag holders

Extra blank card stock

Contribution Forms

Any specific literature/materials that NP/leadership wants to have at the event

**Scheduling Requests:** 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. This has the event details which include date, time, location (if applicable), hosts (if applicable), purpose, size, etc. Scheduling requests are saved here: S:\Northeast\Northeast 2013-2014\Admin\Scheduling Requests

**Long Term Updates** **“LT Update”:** Amy keeps track of the Leader Pelosi’s Long Term Schedule. This document should never leave Amy’s 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 Amy and cc Missy and Stella, and your entire regional team
  + Subject: **Long Term Update** 
    - This is important. It should say nothing more and nothing less than this.
    - Body: Relevant info only. I need to be able to read this quickly and pick out only what I need to send up. The changes need to be made clear- highlight them or 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, Stella, 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:

**5:30 PM - 7:30 PM DCCC RECEPTION HOSTED BY REP. MATSUI**

Location: Home of Tina Thomas and Bill Abbot, 2722 Coleman Way, Sacramento, CA

95818

Details:

Event run time: 5:30p – 7:30p

- 5:30p = Event begins

- 6p = Tina Thomas offers welcome and introduces Rep. Matsui

**- 6:05p = Rep. Matsui speaks and introduces you**

**- 6:10p = You speak**

- 7:30p = Event concludes

- This event will be outside on grass

- Attendees = 45 / Reps. Lee, and Matsui; Candidates Michael Eggman (CA-10) and Amanda Renteria (CA-21)

Staff: Lisa Presta, (415) 515-5452 c

Site contact: Tina

**Event Briefings:** 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.

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 2007-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.

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.

“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.

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.

**Events with the White House:**

There are two significant procedures when you are doing an event with the President, Vice President, First Lady, or a Former President and First Lady. The first addition is the vetting process. All guests must go through a vetting process at least four days before the event to ensure that they can attend. Usually, the assistant is the point person for the vetting process. This means that you must contact every guest who is attending or who is considering attending because you will need their following: First Name, Last Name, Middle Initial, Social Security Number, Date of Birth, Gender, and Employer/Occupation. The individual White House staff prefers a different excel layout and you will receive a different template for each staff. Former Presidents and First Ladies require addresses as well. You will learn that many donors are uncomfortable sending their personal information over e-mail, so it is imperative that you call each potential guest and you need to call them most of the time more than twice. Finally, as you can imagine, you have to keep very organized systems for this process to move swiftly. You are dealing with private information and this excel sheet is sent to the White House, so it must be flawless. Always triple check each entry because your director does not have to time to worry about this because they are busy with other prep work.

The second major difference is that you have to create a White House Briefing. Each White House team requires a different format. Again, you will receive instructions from your director on the appropriate layout. The White House briefing includes both the main and attendee, but the attendee biographies are more concise. In addition, the White House requires photos for each attendee who is scheduled to take a picture. The pictures are important and more time consuming than you often realize. The best places to find photographs are Business Websites, LinkedIn, Facebook, and Socialite blogs.

Events with the White House are very similar to events with Leader Pelosi. It just requires you to be even more-detail oriented because it requires extra materials in a more timely manner. These deadlines are not flexible.

1. **Visa:**

Your 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 her number on file, and will regularly book her travel, buy and send orchids, etc.

Each month, the accounting department will bring you a physical spreadsheet as well as an electronically copy of your director’s 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 your director’s CC statement.

***S:\Northeast\Northeast 2013-2014\Admin\Visa***

**Feedback**

**General:** The DCCC provides a unique campaign experience because it allows you to be part of a much larger team. A campaign for a politician is much smaller, but the DCCC provides the opportunity to interact with all types of people and political skillsets. This is one of my favorite parts of working here.

First, you have your immediate department. Finance is extremely close because our work is less focused on the candidates and more with the Members who have the capacity to raise money for the committee. Therefore, you become very close with the finance department. You will end up traveling and knowing your own department closely, which is great and you should take advantage of getting to know your boss and colleagues.

I also greatly enjoyed sitting with my region because it allowed me to learn more about specific candidates’ and each of their races. With the exclusion of the last few months of the cycle, I was wrapped up in our events and the committee’s overall money raised goals, so I enjoyed sitting with the northeast pod and hearing about the happenings of each of our districts.

More specifically, it was great sitting next to my boss, the Northeast Finance Director and the Northeast Candidate Fundraising Director. It allowed an easy direct line of communication where we could simply look up and ask questions about candidates and Members attending our events.

I think it is important to take advantage of the size of the DCCC. My third week on the job, I was sent out to help with the FL-13 special election. Despite the outcome, I completely enjoyed the experience because I was able to meet people from all different departments. It was great to come back and know people outside of my department and pod.

**Campaign:** For the last month of the cycle, you will be sent out to help the finance operations of a campaign. Each campaign has a different operation. For my last month, I went to the Seth Moulton’s campaign to assist with their finance operations. For the first three weeks, I helped to prospect donors, process checks, and staffed the candidate at different events. For the final week of the month, I helped write and execute the campaign’s GOTV plan.

For the greater part of the cycle, you will be prospecting donors to contribute to the DCCC, so you can easily help the campaign with donor outreach. As you will quickly learn, you can never raise enough money. The campaign will appreciate new donor lists and contact information. MoneyPoliticalLine is a great tool for this because it will allow you to look at national donors as well as local donors. The limit is $2,600 for a campaign, so the donor pool is much larger. In addition, it is a great tool to check if current donors can contribute more to the campaign or to outside groups like House Majority PAC or the corresponding State Party.

Second, I processed their checks. The campaign that I was on did not have a good system for tracking checks because they were overwhelmed with other work. I collaborated with their finance assistant to create a system where we could effectively process the checks into their system and bring them to the bank in a timely manner. My best advice is never to try and change the systems of a campaign because they are often protective over their “methods”, except if it involves losing checks or legal issues. I was very careful to work with the finance assistant to just improve a system that already existed. We created folders and a tracking system to ensure that every check was entered into our system.

Third, I staffed Seth at different events. After a few months at the DCCC, you will know how executive a well-oiled event. However, the infrastructure at the DCCC does NOT exist on a campaign, especially during its last few months. I quickly took the lead on drafting briefings. All Candidates and Members want their briefings to be styled differently, so it is important to be flexible and ready for edits. In addition, I prepared the materials for each event, which included name tags, contribution forms, sign in sheets, Moulton for Congress stickers, contribution envelopes, and a place to put all the contributions. Furthermore, I prepped many of the event spaces. Usually, I arrived at each space about 30 minutes before the start time to set up the registration table and to speak with the hosts of the event prior to the event start time. Especially with these smaller events, it is important for the Candidate to know who has arrived and who he should pay special attention to at each event.

Finally, the campaign is often overwhelmed and exhausted by the last month of the campaign so it is important to help with whatever the campaign needs. For instance, I helped author and execute the campaign’s GOTV plan. Prior to my time at the DCCC, I was a canvass director for a firm that specialized in field campaigns. Therefore, I was able to write out a schedule of events for the staff during this GOTV period of time. I created a system where the staff was divided into four teams and would rotate throughout different field offices to cover the most turf. I was able to use my past field experience to create a cohesive timeline where everyone knew where everyone was during the last three days of the election.

Ultimately, the campaign experience is what you make it. It is important to be open to helping out in any capacity. Do not be afraid to give your advice on a situation, but do not be offended if they do not listen. The more you put into the campaign, the more you will get out of the experience because they need your help. Also, do not be afraid to make contacts and give out your business card. You will meet interesting people and forge new relationships that will be useful for you and the DCCC in the future.

**Taking the Lead on a Finance Event:** I took the lead on the DCCC Luncheon hosted by Congressman John Larson on September 12, 2014 in Hartford, CT. The most important aspect of planning and executing an event is good communication. I found it imperative that everyone was on the same page and that my director knew what my priorities were each day and how I planned on attacking them.

The first step in planning an event is meeting with your host, especially in my case when it was hosted by a congressman. I met with John Larson’s Chief of Staff, Lee Slater, to discuss a basic skeleton of the event and to agree upon a date. This event is an annual occurrence, so the meeting was pretty standard and Lee wanted the event to run similarly to the prior year. The most important part of this meeting was to set a fundraising goal. We used Larson’s prior luncheons to come up with a reasonable goal and we divided it into: PAC goals, individual goals, and tribe goals.

Next, I drafted the invitation for our legal team and Larson’s team to review. It was very important that the invitation was sent out as soon as possible because we wanted to ensure that people would receive it before Labor Day weekend. Once, Larson’s team approved the invitation, we sent it to Leader Pelosi’s team for approval. This process usually takes three to four days. However, Congressman Larson was very specific about this invitation, so the process took a week and a half. You have to accept that you not always have the same aesthetics as Congressman Larson, but all that mattered was that he was happy with the final product.

After that, we worked with Congressman Larson’s Chief, Consultant, and Finance Director to finalize a call list, e-mail blast list, and a list to mail invitations to through the USPS. For the next week, my work focused on following up with the people that we invited. I called through the guest list to ensure that everyone received the invitation. Next, I spoke with the guests who were scheduled to attend to follow up on their contribution and when/how they planned to contribute. Finally, I followed up with the people that the Congressman and Leader Pelosi called. Again, I cannot emphasize how important it is to have good communication throughout this process with your department and the other teams. Our event involved money with PACs, tribes, individuals, and Members. I had to stay in contact with our PAC finance director, Member finance director, and my director to ensure that nobody was overlapping on their work and they knew what money was coming in and when it would arrive.

At the same time, my director and I completed the usual event prep tasks, such as writing main and attendee briefings, prepping talking points and cards, as well as printing name tags and table tents. Again, I cannot stress enough that throughout this process, it is important to have great communication. There are always last minute changes to the guest list. I had to keep in contact with our PAC fundraiser, Member fundraiser, Larson’s team, as well as the other members who were in attendance. Also, it is important to stay in contact with the events director of the DCCC to ensure all the last minute details are prepared.

The biggest difference between assisting and taking the lead on the event was that you are the point person for all communication. Most importantly, you need to be in constant contact with your director. You will need their help and to make the event a success, you both need to be on the same page.

After the event, it is also your job to continually update the contribution spreadsheet, so the host knows what money is outstanding and you can make a plan for follow-up. It is easy to immediately move-on from an event, but follow-up is a necessity if you want to meet your goals.

**Wrap Up**

The best advice that I can give is that it is impossible to over prepare. Everything is always changing and moving forward, so don’t be afraid of changes and edits.

Moreover, it is never a bad idea to debrief after an event or busy month. Take the time to ask for feedback. With more feedback, you can better help with the daily tasks to best build a foundation for more responsibility.