FROM: Manjiri Machak

DATE: November 26, 2014

SUBJECT: Northeast Finance Director Cycle Memo

**Overview**

The Northeast Region was structured with the Finance Director overseeing a Finance Assistant in Washington, DC and a New York City/Tri State area consultant based in New York, NY. The Northeast Finance Director is tasked with working within the Major Gifts program at the DCCC throughout the Northeast 10 states including: Maine, Vermont, Connecticut, Delaware, New Jersey, New York, Pennsylvania, Rhode Island, Massachusetts, and New Hampshire. The Northeast region is usually the second highest grossing region following the West region.

New York City brings in the most contributions and presents a special challenge due to the large amounts of fundraising from other parties, organizations and candidates, making competition for attention and funds in NYC fierce.  Many of the major donors in the city feel that they have a personal relationship with the Leader and respond best to her directly.

The Chairman of the DCCC was Congressman Steve Israel for the 2013-2014 cycle and because he is from New York he was able to take on and raise a large portion of New York City/Tri State money for the DCCC on his own. The Finance Director worked with the consultant to target prospects and renewing members of the Speaker’s Cabinet for the Chairman for all New York based events. The Chairman also took on a large portion of the Chairman’s Council raising from the New York/Tri State region, hosting two Chairman’s Council events in New York on his own and participating in numerous conference calls with the Chairman’s Council throughout the cycle.

The Leader will travel to New York at least twice a quarter most likely more.  Her daughter Alexandra lives in NYC with her husband Michiel and her two grandchildren, and will likely want to see them on any trip she is there. Alexandra and Michiel will also likely attend events. Double check and then triple check to confirm their attendance at every event. I actually just kept extra name tags and table tents for them for all events just in case.

Boston is the second highest grossing city in the Northeast Region. We usually go to Boston 2 or 3 times a year, but I think that we could go more. There are more emerging Boston donors and I think that the DCCC has not tapped into all that it has to offer. Arnie Hiatt is our biggest raiser and is from Boston. He has introduced us to Ian Simmons who is a younger donors who is trying to get the youth civic engagement up. Ambassador Alan Solomont and Ambassador Swanee Hunt are now also trying to do the same thing. The June 2014 First Lady Tea showed that Boston has the capacity to give at the Chairman’s Council level and I think that the next Director should try to build on this. Right now the city is mainly based on Speaker’s Cabinet donors. I think by dropping the price for events that Boston could be opened up next cycle to encourage new donors to come in.

The primary day-to-day responsibilities of the Northeast Finance Director is working with the donors and hosts to meet the monthly goals of your region. In doing this you will work with the consultant and your assistant. The Northeast is a little different than other regions because our region is so close to DC. The Chairman and the Leader are able to go to the Northeast very easily and travel to the region very often. Because of this the Northeast region has a lot of flexibility with events and have a lot of last minute events, meetings, and other events that are dropped on us constantly. This should be used to your advantage, but you must be organized to be able to keep up with this schedule. Communication is a key part to this and you must check in constantly with your consultant and assistant to make sure everyone is on the same page. I kept an up to date calendar that I had written out at my desk. I went over the calendar with my assistant on a daily basis of when briefings were going to be due and when they needed to be started. I tried to stress to the assistant that with the amount of events we had we needed to stay on top of all of our tasks. Going through the calendar and planning out when calls needed to be done, when briefings needed to be started, and when materials needed to be collected proved to be useful for us this year. Doing 4 or 5 two liners a day was a goal I tried to make sure got done so that we were never scrambling more then we needed to at the end. This proved to be very helpful in time management and made the task not so overwhelming.

Another key duty is the management of the DCCC New York based consultant, Jackie Brot Weinberg. Jackie has been in charge of New York based fundraising for many years and is very keyed into the areas donors. She has many clients, which can be a good thing because she knows and is aware of new donors that have burst onto the scene as well as when some donors are taking a break from giving before we hear of it. Use her as an asset as much as you can. She needs to be managed and worked with on a daily bases to check in on her progress and ideas. She will have a quarterly goal and you will be in charge of working with her to make sure she reaches it. This will not only help her, but will ensure that you reach each of your monthly and quarterly goals as well. Creating good and open communication with the New York consultant is a key part to the Northeast Director position.

The Northeast Director is responsible for the successful staffing of all fundraising events in the region. This typically entails coordinate staff, consultants, and Member of Congress Staff for an event. Making sure you have the contact information for all of these people the day of is very important so that if you have questions you can get in touch with them in a timely manner. You will be in charge or working with the hosts and making sure the speaking program works for them and where the registration table can be set up as well as staffing the registration table. If a seating chart is needed you will also be in charge of the first draft of that and then must keep up to date with all changes. I found that I liked to keep all of the emails and cell phone numbers of all my attendees for events in the guest list. This allowed me to get in touch with them easily to find out if they were running late or if they were no longer coming to events. Having all of the emails already collected also allowed me to easily send out reminder emails in the days before an event confirming attendance. It seems like a lot of extra work leading up to an event to keep all of this, but it is so helpful. Especially because I found that New York donors have a lot of scheduling changes.

In the 2014 cycle the Northeast Region raised a total of $8,272,320 for the DCCC out raising both the 2010 and 2012 cycles. A breakdown of the past 6 years of what the Northeast region has brought in can be found here: [S:\Northeast\Northeast 2013-2014\Lists\NE Money In 2009 to 2014.xlsx](file:///S:\Northeast\Northeast%202013-2014\Lists\NE%20Money%20In%202009%20to%202014.xlsx)

**July 2013 to December 2014 Northeast Events Recap**

*\*For events between January 2013 to June 2013 please refer to Megan Nashban’s memo, which can be found here:* [Nashban Exit Memo.docx](file:///\\d3cfile01\finance\Northeast\Northeast%202013-2014\Admin\Nashban%20Exit%20Memo.docx)

**July 25, 2013- DCCC Clam Bake hosted by Congresswoman Rosa DeLauro**

**Goal: $150,000**

**Dues: $25,000**

**Individual: $56,950**

**Total: $82,950**

Congresswoman DeLauro wanted to host an event in Southern Connecticut in the hopes of institutionalizing an annual event for the DCCC, in a similar fashion that Congressman Larson does in Hartford, CT each year. She came up with the idea of a clambake on the water in her district. Congresswoman DeLauro did most of the outreach for this event and had a goal of $150,000 to raise for the DCCC. Leader Pelosi made a handful of calls as well. This event proved to be much harder than expected. Thoughts were that this was because it was the summer and a lot of people were not around. The event ended up raising $82,950 for the DCCC. Congresswoman DeLauro thought she would be able to raise 3 key Speaker’s Cabinet checks from Richard Triebeck, Michael Stratton, and Pam and Richard Cantor, but none were able to attend or contribute. This made her $150,000 goal much harder to achieve. People were also starting to get called by the Larson team for his event in September and so many people said they would give and attend that event as it was easier for their schedule. This event I think could be tried again as the Congresswoman is always helpful and has the capacity to raise from Southern Connecticut. I think this could be tried every other year and if planning was done early I think this could be a successful event. You can find the folder here for this event here: [..\Events\2013\Q3\July\7.25.13 DeLauro Event](file:///\\d3cfile01\finance\Northeast\Northeast%202013-2014\Events\2013\Q3\July\7.25.13%20DeLauro%20Event)

**August 16-18 2013 Napa Valley Issues Conference**

Napa is never a very big showing for Northeast donors as it is on the other side of the country, but we do have a good amount of attendees every year. It is a great tool to use to ask people to renew their membership earlier in the year. You can always add the benefit to Speaker’s Cabinet donors in an ask, which I found that even if they were not interested in attending they liked that they were included and reminded of this event. Around 15 Northeast donors attend each year. You can find the folder for this event here: [..\Events\2013\Q3\August\8.16.13 - 8.18.13 Napa Retreat](file:///\\d3cfile01\finance\Northeast\Northeast%202013-2014\Events\2013\Q3\August\8.16.13%20-%208.18.13%20Napa%20Retreat)

**August 22, 2013- DCCC Cape Cod Cocktail Reception hosted by Elaine and Gerry Schuster with Congressman Kennedy**

**Goal: $150,000**

**Individual: $164,000**

Leader Pelosi met with Elaine in Florida in February 2013. As a result of that meeting Elaine agreed to renew her Speaker’s Cabinet membership (she contributed $10,000 towards that commitment at the meeting) and host a DCCC event at her and Gerry’s home in Osterville, MA. No hard goal was set for this event, but Elaine did an amazing job. She was insistent that Rep. Kennedy attend and be involved with this event and so he was asked to raise $50,000 for it, which he did. Rep. Kennedy has a large network and should be asked to raise and host his own event. Meredith DeWitt is Gerry and Elaine’s political advisor and most of the contact for this event went through her. She is great and knows all of the Boston donors. Elaine and Gerry should definitely be asked to host another event at their Cape Cod home. Osterville is a very republican part of Cape Cod and people liked that the Schusters were able to host a successful event for Democrats. Jack Hornor is a donor from Florence, MA who also has a home in Provincetown, MA. He enjoyed this event and was his first DCCC give. If done in conjunction with Rep. Kennedy again he should be asked to target David Belluck who is able to raise from Martha’s Vineyard and might be able to draw up some interest in an event on the Cape. He also has the capacity to give, but he says he is not giving as much since his recent divorce. He should continue to be asked for every Boston, Cape Cod, and Martha’s Vineyard event. You may find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2013\Q3\August\8.22.13 Kennedy Reception - Cape Cod](file:///S:\Northeast\Northeast%202013-2014\Events\2013\Q3\August\8.22.13%20Kennedy%20Reception%20-%20Cape%20Cod)

**September 13, 2013- DCCC Annual CT Lunch hosted by Congressman Larson**

**Goal: $150,000- $200,000**

**Dues: $114,000**

**Individual: $76,425**

**PAC: $16,000**

**Tribe: $10,000**

**Total: $216,425**

Lee Slater is Congressman Larson’s Chief of Staff Lee Slater and John Rossi was his In State Director. Please Note: John Rossi has left the Congressman’s office recently. Sad day! Congressman Larson hosts an Annual DCCC Luncheon on On20 every year in Hartford, CT. It is conjunction with his Bocce Tournament that is attended by many different elected officials from Connecticut. Leader Pelosi attends as often as she can as well. The Bocce Tournament is on Friday night of the weekend events and the DCCC Luncheon is on Friday at 12pm noon. There is a VIP reception for those people that contribute or raise $5,000. All elected officials will be invited into the VIP reception. Congressman Larson does most of the raising for this event and it is always successful. It is also always a lot of work because there are a lot of moving parts to this event as well as the Bocce Tournament and getting the Larson team to focus on the lunch can be difficult at time. Leader Pelosi will make a handful of calls for this event as well at the request of the Congressman. Congressman Larson will also raise dues from Members of Congress who attend the event and will also raise some Tribe moneys as well as PAC. I found that keep all of this in a Google Doc was very helpful because the Larson team was able to see where everything was as well as the DCCC staff. Checking in daily with them to make sure everything was updated was key to the success of the organization of this event. You will also have to work with the DCCC Tribe Lead as well as the PAC Lead to coordinate the money expected to come in through this event. As September is the end of the quarter everyone is constantly looking for where their money is and so keeping everyone in the loop is very helpful. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2013\Q3\September\9.13.13 Larson Luncheon - Hartford](file:///S:\Northeast\Northeast%202013-2014\Events\2013\Q3\September\9.13.13%20Larson%20Luncheon%20-%20Hartford)

**September 26, 2013 – LGBT Breakfast NYC (Cancelled)**

Please see Jeff Lewis’ exit memo for details about this event. It may be found here: [S:\Northeast\Northeast 2013-2014\Admin\Jeffrey Lewis Exit Memo.docx](file:///S:\Northeast\Northeast%202013-2014\Admin\Jeffrey%20Lewis%20Exit%20Memo.docx)

**September 26, 2013 – DCCC New York City Chairman’s Council Dinner (Cancelled)**

**Goal: $125,000**

**Total Raised Before Cancelling: $137,400**

**Total After Cancelation: $123,900**

This event is an annual event that Chairman Steve Israel hosted in New York for his Chairman’s Council donors with a ticket price of $5,000 and higher. Chairman Israel tried very hard to cater to the $5,000 donors from the New York region who maxed out at the campaign level, but were not engaged with the DCCC. He hosted these events to try to bridge the gap between the Chairman’s Council donors as well as the Speaker’s Cabinet donors in the New York region that he had relationships with. These events were usually pretty successful. This event was scheduled as a dinner at the end of September and was supposed to help with contributions before the end of the quarter. The government shutdown was looming during this time and votes were called at the last minute and we had to cancel this event the day of. We did a very good job of collecting all or most of the pledges, but it took a little bit longer and went into Q4. The folder for this event can be found here: [S:\Northeast\Northeast 2013-2014\Events\2013\Q3\September\9.26.13 Chairmans Council Dinner - NYC](file:///S:\Northeast\Northeast%202013-2014\Events\2013\Q3\September\9.26.13%20Chairmans%20Council%20Dinner%20-%20NYC)

**October 11, 2013 Reception hosted by Rep. Slaughter**

**Goal: $75,000**

**Dues: $30,000**

**Individual: $62,500**

**Total: $92,500**

Rep. Slaughter thought she would be able to get two Speaker’s Cabinet donors from her district to max out. This proved to be tougher then she thought, but she did well. This was a smaller event with only 18 people attending and many at a lower ticket price. She wanted to be able to have brothers Dan and Eli Futerman each max as well as Ursula Burns, and Tom Wilmot. Om Wilmot was the only one who contributed, but the others should be continued to be targeted. The Futerman’s are building houses in Paris and so if they are in the state they would be interested. Ursula said that she would be more interested in the “on year”, but was unresponsive in 2014. Maybe in the 2016 cycle she may be interested. The Lidestri’s were hosts of this event and should be reached out to as well. They only contributed at the Chairman’s Council level, but they have the capacity to be Speaker’s Cabinet members. I think if Rep. Slaughter was asked to do this event again I think her goal should stay around the $75,000 to $100,000 range. I don’t think she should be overwhelmed with a high ask or a large event, but this turned out well and I think with a little more time she could do well if the Leader was going to be in the area. The folder for this event can be found here: [S:\Northeast\Northeast 2013-2014\Events\2013\Q4\10.13.13 Slaughter Tea](file:///S:\Northeast\Northeast%202013-2014\Events\2013\Q4\10.13.13%20Slaughter%20Tea)

**October 25, 2013 NYC POTUS**

**Goal: $750,000**

**Dues: $60,000**

**Individual: $720,000**

**Total: $780,000**

This event went through a number of ideas for hosts before settling on Karen and Dennis Mehiel. Leader Pelosi met with Dennis and James Chanos and agreed to host an event for the DCCC. When we got word that the President was coming to New York, Karen and Dennis agreed to host. They have been hosting events for the DCCC at their home for many years. They secured Kathryn and Kenneth Chenault as the hosts for the reception and were able to get them to contribute for the first time as well. The Mehiel’s raised $159,600 for this event. They usually raise from within the Greek community. This event was good and we were able to get a few new donors for this event. I think the hard part was the timing as it was right after the government shutdown and many people were looking away from campaigns and politics. Many of our donors had also just attended the HSVF dinner with President Obama 5 months earlier and were not interested or maxed. I think that asking the Mehiel’s to host a dinner at their home is always a good idea, but maybe have them reach out to their network and have it be at a fun restaurant because we have used their space so much. If not, I think their home is lovely and always works well. The folder for this event can be found here: [S:\Northeast\Northeast 2013-2014\Events\2013\Q4\10.25.13 NYC POTUS](file:///S:\Northeast\Northeast%202013-2014\Events\2013\Q4\10.25.13%20NYC%20POTUS)

**October 30, 2013 Boston POTUS**

**Goal: $750,000**

**Total: $766,300**

Leader Pelosi met with Arnie Hiatt in March 2013. As a result of that meeting Arnie agreed to renew his Speaker’s Cabinet membership (which he did in May 2013) and host a dinner for the DCCC on a Sunday evening at the Four Seasons Hotel in Boston. When we were told that President Obama was coming to Boston we asked Arnie if he wanted to fold his event into the one with the President. He had a goal of a very soft $250,000. He went above and beyond and raised $301,600 by himself. Arnie is the best raiser in the Northeast and should be treated with the utmost kindness. He is on the older side and has some issues with technology and so the Director will need to use patience with him and his assistant Ellen Sahl. She is the gate keeper for him for the most part, but there will be times when you will interact directly with Arnie. He is the best, by the end of my time at the DCCC I spoke with both Arnie and Ellen on a regular basis.

Ambassador Alan and Susan Solomont had just gotten back from Spain and Alan had just finished his ambassadorship when we received word that the President would be coming to Boston. We had the Leader reach out to Alan about hosting the event. Alan and Susan both agreed to max out for this event. They did not want to directly raise, but did circulate the invite around to people in their network and did brainstorm ideas of people the Leader could reach out to for this event. They have a very large network and I think they should be reached out to about hosting an event at their home again. They go to the same Temple as many of our donors and prospects in Boston and are largely known in the community. Alan is now at Tufts and is about getting the youth involved. Ian Simmons who is also in Boston and a new donor in 2014 to the DCCC is also about youth engagement. The two of them may want to team up for some kind of event. My suggestion would be a higher dollar dinner where $16,200 or more gets you into a VIP reception and then at $5,000 you are able to sponsor a table of young people for a dinner with the Leader and electeds from Massachusetts. Ambassador Swanee Hunt may be interested in something like this as well. Rep. Kennedy may be interested in something like this as he just did a tour of College campuses around the state. Rep. McGovern joined him at some schools.

In regards to this event itself, it proved to be very successful. We got 8 new DCCC donors from it and they should be reached back out to this cycle. The weeks leading up to this event were during the government shutdown and so we were able to receive help from the Massachusetts delegation willing to make calls. They did not want to make money asks for their own campaigns during the shutdown, but many liked reaching out and talking to their donors and saying “look what they did. This is why your help is needed”. This proved to be effective in getting people interested in contributing for this event. The folder for this event can be found here: [S:\Northeast\Northeast 2013-2014\Events\2013\Q4\10.30.13 Boston POTUS](file:///S:\Northeast\Northeast%202013-2014\Events\2013\Q4\10.30.13%20Boston%20POTUS)

**December 10, 2013 LGBT Breakfast NYC (Cancelled)**

Please see Jeff Lewis’ exit memo for details about this event. It may be found here: [S:\Northeast\Northeast 2013-2014\Admin\Jeffrey Lewis Exit Memo.docx](file:///S:\Northeast\Northeast%202013-2014\Admin\Jeffrey%20Lewis%20Exit%20Memo.docx)

**December 10, 2013 SPC Holiday Lunch**

The holiday lunch was on a day of snow in DC. We had to confirm all attendance as we did not cancel it. All of the Northeast people still came even if some arrived late. Not all of the Members were able to attend as votes were called. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2013\Q4\12.10.13 SPC Holiday Lunch](file:///S:\Northeast\Northeast%202013-2014\Events\2013\Q4\12.10.13%20SPC%20Holiday%20Lunch)

**January 15, 2014 Chairman’s Council Conference Call**

Periodically Chairman Israel did conference calls for all Chairman’s Council members and higher about the what we were able to do in 2013 and where we are going in 2014. You can find the folder for this event here: [Y:\Northeast\Northeast 2013-2014\Events\2014\Q1\1.15.14 SJI Conference Call](file:///Y:\Northeast\Northeast%202013-2014\Events\2014\Q1\1.15.14%20SJI%20Conference%20Call)

**January 31, 2014 SJI Political Update in New York**

Chairman Israel did a political update in New York to expand on what he went over in the conference call. He gives a presentation and asks attendees to participate by asking questions. In New York this worked very well. People liked that there was no price tag on attending and they learned about how their money was being used. New York donors also have a better relationship with the Chairman and so they liked that he was coming to them and offering something like this for them. I think the new Chairman should keep doing these yearly updates. You can find the folder for this event here: [Y:\Northeast\Northeast 2013-2014\Events\2014\Q1\1.31.14 SJI Political Update](file:///Y:\Northeast\Northeast%202013-2014\Events\2014\Q1\1.31.14%20SJI%20Political%20Update)

**February 10, 2014 Himes Lunch in Greenwich, CT**

**Goal: $125,000**

**Dues: $40,500**

**Individual: $108,000**

**Total: $148,500**

Rep. Himes wanted to host an event for the DCCC this year. He had a lot of ideas about this event and what he thought he could do with it. The biggest issue I found was that the Himes team really just wanted to call the DCCC list and did not understand that the most successful events are the ones where Members reach out to their own network. He also got caught up in looking at max out donors and not figuring out that he could call people at $1,000 and $2,500 level and get them involved with the DCCC. By the end of the event this was a very successful lunch. We had a lot of lower and newer donors to the DCCC. I would think that this event could be done again, but a lot of hand holding needs to be done. We had a good amount of lead time for this event, but really the last 2 weeks were when most of the work was done, which was very frustrating. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q1\2.10.14 Himes CT Luncheon](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q1\2.10.14%20Himes%20CT%20Luncheon)

**February 27, 2014 Annual Meeting with Bill and David Harris with Leader Pelosi and Rep. George Miller at the Washington, DC Four Seasons**

**Raised: $100,000 for the DCCC**

This is the annual breakfast with Bill and David Harris. This year, even though the meeting was in the end of February the Harris family contributed their $100,000 in January to make sure we had a strong month. They raise from their family as well as from KidsPAC. With Rep. Miller retiring this year you will need to see if they want to meeting with someone else or if they just want to meet with Leader Pelosi. In 2014, the Harris family also contributed on top of this an additional $10,000 to the DCCC for the Women’s Bus Tour in May as well as $31,000 to candidates in September for the Hillary Clinton Luncheon. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q1\2.27.14 Harris Meeting](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q1\2.27.14%20Harris%20Meeting)

**March 21, 2014 Chairman’s Council Lunch**

**Goal: $150,000**

**Total: $165,645**

Chairman Israel was very good about hosting Chairman’s Council events in New York by himself. The event always had a goal of $150,000 and he usually outraised his goal. This was nice because Leader Pelosi did not have to do anything for these events and so she was able to use her time on other projects. For this event, we allowed those who contributed and RSVPed for last year’s event that had to be cancelled to attend. Chairman Israel really played well in New York since he is from there and so it was nice that he was able to host these events once or twice a year to engage donors at the lower level and not always at the Speaker’s Cabinet level. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q1\3.21.14 Chairman's Council Lunch](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q1\3.21.14%20Chairman's%20Council%20Lunch)

**March 21 to 2 2014 New York Issues Conference**

This event is an event that is mostly geared towards the PAC community, but because it is in New York some of our New Yorkers do attend as well as some of our other Members from the Region. Woody Kaplan from Massachusetts and Julia and Eugene Ericksen from Philadelphia like to attend each year. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q1\3.22.14 NY Issues Conference](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q1\3.22.14%20NY%20Issues%20Conference)

**March 30, 2014 New York Women’s Issues Host Dinner and March 31, 2014 New York Women’s Issues Conference**

**Goal: $350,000**

**Total Raised for Candidates: $93,100**

**Total Raised for DCCC: $400,035**

**Total Raised: $493,135**

This event is hosted by Sarah Kovner and Anne Hess every on year of the cycle. They are great and will be very particular about this event. They will create a host committee for event and there will also be a dinner the night before the conference for those people on the Host Committee, the guest speakers, and those that contribute or raise $5,000 or more. This year we held the dinner at Karen and Dennis Mehiel’s home. It was a lovely event and we invited all the Members and Candidates who were invited to attend the conference the next day as well. For the actual conference there will be a breakfast, the issues conference with panels, and then a lunch with a guest speaker. As you can see there are a lot of moving parts to this event. You must be organized and you must ask questions if you are confused about something. Anne and Sarah are very particular about everything when it comes to this event and so asking and double checking your work will be key. Things will go wrong of course, but if you are organized you will be able to work the problem much better. The lunch is a seated event and Sarah and Anne will want to decide the seating for it. Again they are particular about this. For reaching out to Members for this event I kept a spreadsheet and asked people to send me both the contact information for the Member themselves as well as the best staffer contact information for the day of. This was very useful to have all of the information in one place. It was a pain to keep updated as staff contacts changed, but it was very useful for the conference to have. This was a good event and everyone seemed to enjoy it. I think that the guest speaker’s at lunch were a little long winded and so if there was someone a little more exciting I think people would like that and stay. I thought a lot of people left by the time the lunch was because of this. This meant that we had to fill in holes at tables and the Leader’s table. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q1\3.31.14 Women's NY Issues Conferece](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q1\3.31.14%20Women's%20NY%20Issues%20Conferece)

**May 5, 2014 New York City Biden Lunch hosted by Paula and Jeff Gural**

**Goal: $200,000**

**Raised: $217,200**

Paula and Jeff Gural host this event each cycle in New York. This is the second time that Vice President Biden has been the special guest. This was a small lunch, which Jeff did all of the raising for. Jeff reaches out to his network of business associates in the real estate community as well as his family. Ticket prices were $32,400 per couple, $25,000 per couple, $10,000 per couple, and $5,000 per individual. All tickets received a picture at the lunch, but there was no formal photoline. Some of the candid pictures were nice, but some were not. I think if this event is done again I would try to make sure that everyone at least posed next to Vice President Biden for a photo to make sure that everyone was happy with their photo. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q2\05.05.14 NYC Biden Lunch](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q2\05.05.14%20NYC%20Biden%20Lunch)

**June 2, 2014 Boston FLOTUS**

**Goal: $450,000**

**Dues: $55,000**

**Candidate Money Raised: $13,400**

**DCCC Raised: $391,550**

**Total Raised: $459,950**

For this event we had a lot of ideas of what it could be and I was coming off a high of the October Boston POTUS event. We only had 3 weeks for a lead time so some things had to be changed and I had to be very organized. The event turned into a Women’s Tea, which actually was one of the best events I have ever worked on. Everything went very smoothly in the end. The Women’s Bus Tour used this event as on of the stops and so we had a lot of Women Members attend this event. It was actually really great to see and have the First Lady be with them. To manage all of the Members that were attending I made a spreadsheet again of all the contact information so that I could easily track everything. There were a lot of moving parts and so I cannot emphasize enough that if you take the extra time before to get yourself organized it will be so much easier later on. You just have to take a breath and take it step by step. We made the ticket prices for this event at the $5,000 level got you 1 picture with the First Lady and you were able to fill a table of 10 people for the lunch. This was actually one of the first times we have done a lower ticketed event in Boston and it worked really well. We did get a lot of new Chairman’s Council donors, which was nice to see. I think people liked that the DCCC was being accommodating to them like never before. I would say that we should try to do another low dollar event in Boston next cycle because people were responsive and this event proved that there is a market for it. Yes some of our Speaker’s Cabinet donors attended as guests or at the lower level, but I think it built a lot of good will in the city for the DCCC. Congresswoman Katherine Clark was very helpful with this event. She raised a new Speaker’s Cabinet contribution from Betsy Patullo who was unable to attend, but did fill a table of 10. Rep. Clark should be asked to host an event on her own next cycle. She will need a lot of help, but I think she could raise $100,000. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q2\6.2.14 FLOTUS Boston](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q2\6.2.14%20FLOTUS%20Boston)

**June 17, 2014 NYC LGBT Breakfast**

**Goal: $15,000**

**Total: $15,850**

The Northeast usually does two LGBT events a year. One is smaller and one is larger. Both are in New York and Mitch Draizin is our biggest asset. He is very well connected to organizations and young people in New York who are gay and so he reaches out to them for these events. The smaller events are a much smaller ticket price and we do not raise that much from them. They serve as a good will event and makes Mitch very happy. Mitch can be a tough nut to crack, but he is very useful so just keep trying with them. He will warm up to you eventually. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q2\6.17.14 NYC LGBT Breakfast](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q2\6.17.14%20NYC%20LGBT%20Breakfast)

**July 8, 2014 Comcast breakfast**

**Goal: $75,000**

**Total: $69,250**

David Cohen hosts an event with at Comcast in Philadelphia every on year. This year, it was a little bit smaller then in years past. We reached out to Rep. Crowley and Rep. Hoyer about attending as well as making a few calls that Comcast had asked them to make. With the 4th of July holiday, neither Member ended up making any calls. Most of the attendees are those people who work with or at Comcast. There are a few people who attended who are friends with David. This is a relatively low maintenance event and it is an easy train ride away. I would suggest not picking a date that is right around a holiday and really trying to get Reps. Crowley and Hoyer to make a few calls. I think with their help this event could definitely raise $100,000 to $125,000. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\July\7.8.14 Comcast Breakfast](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\July\7.8.14%20Comcast%20Breakfast)

**August 15 to 17 Napa**

Again, Napa is very big for the Northeast because it is on the other side of the country, but we have a good showing. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\August\8.15 - 8.17 Napa SPC Conference](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\August\8.15%20-%208.17%20Napa%20SPC%20Conference)

**August 29, 2014 RI POTUS**

**Goal: $350,000**

**Total: $249,200**

In the Spring of 2014 we thought that we were going to get Vice President Biden in Rhode Island and so we reached out Rep. Langevin and Rep. Cicilline to let them know and see what their thoughts were. They thought it would be hard to raise so much money, but that it was possible to get to around $250,000. They said that people were getting hit up by the Governor’s race and so were not focused on a lot of other things. We had a few possible dates for Vice President Biden and so The Varieka’s were reached out to as possible hosts. They were supposed to host an event with Vice President Biden in 2013 for the DNC, but he had to cancel at the last minute due to his son being ill. In the end the Vice President was unable to attend. In August we found out that President Obama would be able to attend an event in Rhode Island the Friday before Labor Day. So we went back to Rep. Cicilline and Rep. Langevin. It was decided that now that the Vice President was not coming, but the President was Rick Bready would be a better host for the event instead of the Varieka’s. This definitely did not make the Varieka’s happy. They feel like they have now been let down by the DNC and the DCCC. They only contributed $7,500 for both of them to attend. They were very insistent about a lot of things about this event and at the end of the day, the event fell short of even the original low goal. If the Vice President had come I think the amount raised would have been ok, but for a Presidential event I do not think it was worth anyone’s time or effort. I would highly recommend not doing an event in Rhode Island with these members. If the Leader wants to go back I think that we would need to find a host to raise the money. I found that a lot of people and donors are not the biggest fans of the Congressional delegation and I think that hurt us in the end because we had to play by their rules. Paul Garrido who is from Boston did attend and contribute $15,000. He is a new donor and should be invited to DCCC Boston events. He said he wanted to be stay involved. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\August\8.29 RI POTUS](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\August\8.29%20RI%20POTUS)

**September 4, 2014 Bill Clinton Dinner hosted by Jim Chanos and Dennis Mehiel**

**Goal: $400,000**

**Total: $416,000**

Jim Chanos met with Leader Pelosi and Karen and Dennis Mehiel in July of 2013. Jim as well as the Mehiel’s agreed to host events for the DCCC and raise $200,000. The Mehiel’s hosted the event with the President in New York at their home in October 2013. Jim Chanos offered to host an event at this home in March of 2014, but had to cancel as it was the same week as New York City School Spring Break and he found that no one was able to attend. He did say that he wanted to reschedule. When we found out that President Clinton was willing to do an event for us we asked Jim Chanos to host this event for us. This ended up being a very successful event and if President Clinton is ever willing to do an event for the DCCC it should be used as the biggest catch all. People were coming out of the woodwork to attend this event. People who ignored us for the rest of the year all of a sudden were interested. We only had 2 weeks notice for this event. I think if we had a longer time we would have been able to do even better. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\September\9.4.14 WJC Dinner](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\September\9.4.14%20WJC%20Dinner)

**September 12, 2014 Larson Luncheon**

**Goal: $200,000**

**Total: $227,851**

This event is the annual event that Rep. Larson hosts in conjunction with his Bocce tournament. The lunch is always at On20 in Hartford. This year John Rossi was not with the Congressman anymore as he left to go into the private sector and has a great job. John was the Congressman’s In State Director and knew everyone. Lee Slater is the Chief of Staff, but knows a lot of the DC people. This meant that Lee had to hire Geoff to help with the instate fundraising. A lot of different kinds of money come in through this event. Dues, Individual, PAC, and Tribe money. You have to stay in good communication with the DC PAC and Tribe Directors to make sure they know what to expect to come in for this event. You should also talk to the person in charge of Member Dues to make sure they are aware of the dues that will come in. At first I thought that having John not a part of the Larson team was going to be very bad for the event, but in the end Lee pulled it off and outraised last year’s event. You have to stay in daily contact with them about this event as a lot is going on with this weekend for them. Communication is key and I set up a google doc so that we could all see the pledges and money in for this event. This proved very helpful. I had a $65,000 goal for Individual money for this event that they fell a little short of. The Congressman should be pushed to keep trying to raise from his individual donors for this event. That part still needs to be worked on for next year. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\September\9.12.14 Larson Luncheon](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\September\9.12.14%20Larson%20Luncheon)

**September 14, 2014 Boston Dinner hosted by Arnie Hiatt and Marcia Morris**

**Goal: $250,000**

**Total DCCC: $440,000**

**Total Candidate: $91,000**

**Total: $531,000**

Arnie Hiatt is a very big fan of Leader Pelosi’s. If she asks him to host an event he will and so he hosts this event for us every year. He likes Sunday evenings in September. Arnie will do all of the raising for this event. He thinks of it as a challenge and tries to out due himself. This year he did great. He needs a lot of hand holding and so does his assistant Ellen. They are both wonderful, but you will interact with them constantly. They will have a lot of questions about their donors, but just know that it will all work out in the end for the better. Arnie is the best raiser in the Northeast and you should build a relationship with him from the beginning. He is the BEST! You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\September\9.14.14 Arnie Hiatt](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\September\9.14.14%20Arnie%20Hiatt)

**September 15, 2014 LGBT Reception hosted by Tim Gunn**

**Goal: $150,000**

**Total: $167,625**

The Northeast always hosts a larger LGBT Equality Council event in New York. This year we had Tim Gunn host the event again for us at his home in New York. It is a small apartment, but Tim is very easy to work with and will let us do whatever we want. He will also do a photoline with guests. He is honestly the nicest man ever. We invited all the Members of the Equality Council, but none were able to make calls this year. Many of them found that this event is cursed. Last year we had to cancel smaller events because of the Government Shutdown and then a snow storm. This event, votes were called for this Monday at the last minute, but most Members were still able to attend. Mitch Draizin is of course heavily involved. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\September\9.15.14 LGBT Reception](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\September\9.15.14%20LGBT%20Reception)

**September 29, 2014 Hillary Clinton Lunch**

**Goal: $500,000**

**Total Individual: $356,900**

**Total Candidate: $111,000**

**Dues: $130,748**

**PAC: $15,000**

**Total: $613,648**

This event was organized right after our President Clinton event with not a lot of lead time. There was also a candidate portion where certain candidates were able to raise for this event and invite guests to the either be a part of the photoline or a large reception. This proved to be difficult for us to sell tickets to our lunch because people could spend $2,600 and still be able to get a picture and go to the reception. With this being said, we did very well and the lunch was actually very nice with a very good group of donors in attendance. I think everyone was very happy about how intimate it was and Hillary Clinton even went around and spoke to everyone at each table before taking her seat. It was very nice and even though a lot of work and a lot of confusion for our donors it worked out in the end. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q3\September\9.29 HRC Luncheon](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q3\September\9.29%20HRC%20Luncheon)

**November 3, 2014 DCCC Boston Speaker’s Cabinet Appreciation Coffee**

This was a thank you event in Boston that was very last minute for Speaker’s Cabinet Members. Leader Pelosi was attending the funeral of Boston Mayor Menino and so wanted to host this coffee for people. Even with very little notice 17 people attended and it was a very lovely event. I think that if there is ever a time for these people to be in a room together and not have to pay is a good thing. There is a lot of knowledge amongst them and it was good to hear from them all. You can find the folder for this event here: [S:\Northeast\Northeast 2013-2014\Events\2014\Q4\11.3.14 Boston SPC Coffee](file:///S:\Northeast\Northeast%202013-2014\Events\2014\Q4\11.3.14%20Boston%20SPC%20Coffee)

**December 8, 2014 DCCC Debrief in New York City with Chairman Israel and Lujan**

Chairman Israel wanted to do a special political debrief in New York for Chairman’s Council Members and Speaker’s Council Members. This event has no cost to attend and was done in order to build good will. Incoming Chairman Ben Ray Luján was invited to attend as well. You can find the folder for this event here: [Y:\Northeast\Northeast 2013-2014\Events\2014\Q4\12.8.14 SJI Political Update](file:///Y:\Northeast\Northeast%202013-2014\Events\2014\Q4\12.8.14%20SJI%20Political%20Update)

**Speaker’s Cabinet and Chairman’s Council Members to introduce yourself to and know**

1. Ellen Poss (Boston)
2. Ellen is good friends with the Leader and will renew her Speaker’s Cabinet Membership each year.
3. If the Leader is in Boston she should be reached out to.
4. Betsy Patullo (Boston)
5. Betsy was a new donor this year for the Boston FLOTUS event. She was brought in by Rep. Clark.
6. She was not able to attend the event herself, but filled a table of ten.
7. She should be reached out to again so that she stays engaged.
8. Susan Livingston (Boston)
9. Susan was a new donor this cycle. She likes the bigger events and should be continued to be reached out to when the Leader is in Boston.
10. David and Bill Harris (New York and Boston)
    1. KidsPAC
    2. David and Bill established KidsPAC to shine light and attention on lower income inner city youth to make sure they have healthcare and education.
    3. They meet with Leader Pelosi at the beginning of the year and raise $100,000 for the DCCC from their family and KidsPAC.
    4. They like to attend events and will want to use their $100,000 from the beginning of the year throughout to attend Speaker’s Cabinet events. Most of the time we let them attend, but sometimes we ask that they either contribute another contribution, raise a contribution, or give to candidates.
11. Meredith DeWitt - Elaine and Gerry Schuster, Jonathan Lavine, Anita and Josh Bekenstein (Boston)
    * 1. Meredith is a wonderful resource in the Boston area. She has been doing fundraising there for many years and knows all of the major players. She handles Jonathan Lavine and Elaine Schuster’s political contributions. She also handles a lot of the contributions for those people who work at Bain Capital.
12. Ellen Sahl with Arnie Hiatt and Marcia Morris (Boston)
    * 1. Ellen is Arnie’s assistant. She is fabulous and is the gate keeper for the most part for Arnie. She usually works during the day, but in the morning or in the evening hours it may be hard to get a hold of her. Arnie is not the most tech savvy person and so Ellen and I work with Arnie to make sure that he is able to schedule, connect, or email the Chairman or the Leader. He is very close with Leader Pelosi and considers her a friend. If you for some reason you are having a hard time getting an answer, Leader Pelosi making a call or “email” can be very useful.
13. Andrew Wright with Vin Ryan and Carla Meyer (Boston)
14. Andrew is Vin Ryan’s political manager and is very responsive on phone and email. You will work with him to secure Vin and his families contributions for the year. If you are ever in need of anything from Vin or Carla you should reach out to Andrew because he may be able to get an answer faster from them then you will be able to.
15. Susan and Ambassador Alan Solomont (Boston)
16. Alan and Susan have a large network that they can raise from.
17. They hosted the Boston POTUS event at their home, but did not do a lot of outreach for it. I think they totally can and should raise for us.
18. Now that Alan is at Tufts he is more involved with youth civic engagement.
19. He should be asked to host an event and raise.
20. He may want to team up with Ian Simmons who is also interested in youth civic engagement to host a high dollar VIP reception and then a lower dollar dinner with the Leader. This way young people could be involved.
21. E. Brad Meyer (Boston)
    1. Brad is the son of Eugene Meyer the owner of the Washington Post and head of World Bank. He grew up in Baltimore and Leader Pelosi and he know a lot of the same family friends from back in the day.
    2. He is a new donor to the DCCC this cycle, but should be kept engaged. He likes the larger events such as ones with the President or Hillary Clinton and so if there is ever an event in the Northeast with a high level elected he should be invited. He is able to travel.
    3. Brad’s wife died in October 2013 and so he is now getting more involved with politics.
    4. If his phone is disconnected keep trying every so often. He turns it off for days and weeks. He also does not check his email all the time. Do not get discouraged. He will answer on his own time and then max out. It is glorious.
    5. Brad is very interested in campaign finance reform.
22. Nancy and Rein Beeuwkes (Boston)
    1. They usually pick up their home phone.
    2. Rein is pronounced “Rye-N” and their last name is “Bee-you-cuss” and rhymes with Lucus.
23. Mary Carol with George Krupp (Boston)
    1. George is the ring leader of his families giving. George’s mother is Bernice Krupp. George is married to Lizbeth Krupp. Lizbeth and George have two sons: Michael and Daniel Krupp. Michael is married to Liana Krupp. Liana and Michael Krupp have a baby girl who was born on George Krupp’s birthday named Frankie Selma Krupp on October 16, 2014. It is the first girl of the family. George is the brother of Douglas Krupp. Douglas is married to Judith Krupp. Judith and Douglas have two sons: Alex and Richard Krupp. Richard is married to Natasha and they live in NYC.
24. Ian Simmons (Boston)
    1. Married to Liesel Pritzker Simmons who is due to have the couple’s first child in December 2014. Ian is big on youth civic engagement.
25. Roma with Judy Scheide (New Jersey)
    1. Judy’s husband passed away in November 2014 at the age of 100.
    2. Roma is Judy’s assistant.
    3. Judy never changed her last name so if you see her in vetting sheets she is Judith McCartin. She goes by Judy Scheide.
26. Phil Munger (New York)
27. Phil is a little bit unreliable when it comes to communications, but he is a great donor and is very keyed into politics and what is going on. He is also able to give to candidates. He is close with a lot of our donors and Members from New York and will pop up at different events. Try to vet him for events just in case. Also, he uses text messages occasionally to get a hold of you. So if email or calls are not working. Try texting him. He will most likely respond.
28. Peter Thoren with Emily and Len Blavatnik
    1. All communication for the Blavatnik’s goes through Peter. Peter is married to Lisa. Lisa and Peter attend events on behalf of the Blavatnik’s. They have never given themselves. The Blavatnik’s usually give in October or November to be considered Speaker’s Cabinet Members for the next year.
29. Bruce Charash (New York)
30. Bruce is a doctor in New York. He has a dog name Scout who will attend Napa with him. Make sure that his room is dog friendly early. He does not mind paying more. Bruce is very nice and close with the Chairman.
31. David Hogan (good friends with Chuck Ortner) (New York)
32. David likes to be invited to everything, but can rarely attend. Keep inviting him though. He will always attend Napa at the very least. He is good friends with Bruce Charash and they should be seated near each other when doing seating for events.
33. Chuck Ortner (good friends with David Hogan) (New York/ Beverly Hills)
34. Chuck now lives in Beverly Hills, but Northeast still gets credit for him.
35. He gives in $2,500 monthly installments and then doubles up in December.
36. When pulling lists make sure he is always invited and added. You have to add him in separately because he is in California and will not normally pull.
37. Make sure he is invited to all New York events.
38. Mitch Draizin (New York)
    1. Mitch is very involved with the LGBT community. Mitch is married to Fritz who became a US Citizen in September 2014.
39. Lou Reese (New York)
    1. Lou goes by Lou, not Louis. He is married to Mei Mei Hu. They are young and donors of DCCC Chairman’s Steve Israel. They should be invited to “cool” events as that is how they like to give. They travel to Asia a lot, but their plans change often. Even if they say they cannot attend something make sure to invite them as sometimes they can attend at the last minute. They have the cutest kids! With Chairman Israel not being the Chairman anymore they should be kept in the loop and still reached out to.
40. Julia and Gene Ericksen (Philadelphia)
41. Julia and Gene have a lot of big ideas, but are not the best raisers.
42. They are very good about renewing their Speaker’s Cabinet Membership and will do so in the first quarter.
43. If the Leader is in Philly she should meet with them. We tried to have them have a small coffee with other prospects, but it did not go very well. I do not think we ask them this again and just say that the Leader would like to meet with just them for coffee. They seem to get overwhelmed very easily.
44. They attend Napa every year.
45. Michael Perik (Rhode Island)
46. Michael came back to the DCCC this year after taking a break when Rep. Patrick Kennedy left Congress. He renewed his Speaker’s Cabinet Membership and brought his wife and sons to the Rhode Island POTUS event.
47. He is good friends with Rep. Elect Mark Takai from Hawaii and has offered to host an event for him in Hawaii in January of 2015.
48. Carolyn and Malcolm Weiner (Greenwich)
49. Carolyn and Malcolm hosted the event in Greenwich at their home with Rep. Himes. They have the potential to be reoccurring Speaker’s Cabinet members. They like the Leader and should be reached out to again to either host or renew their membership. If an event is not able to happen then the Leader should try to see if she could do coffee at their home if she is near there.
50. Sarah Boles (Greenwich)
51. Sarah was a new donor this year brought in by Rep. Himes. She should be continued to reached out to in order to keep her engaged. She has the potential to be a Speaker’s Cabinet donor.
52. Paul Garrido (Boston)
    1. Paul is a new contributor from the Boston area and he should be continued to be reached out to. He is interested in events in both the Rhode Island and Boston areas. He is close with Rick Bready.
53. Kate Deyst and Ken Nickerson (Boston)
54. Kate and Ken have 2 daughters
55. They are usually very good about being Speaker’s Cabinet members.
56. This year they contributed $10,000 and said that they had some personal issues going on. I never found out what these were.
57. They should be reached out to anytime the Leader is in Boston.
58. Anne Hess and Craig Kaplan (New York)
59. Anne and Craig are very good organizers and are hosts of our Women’s Issues Conference.
60. Anne and Craig are very good friends with Sarah and Victor Kovner.
61. Make sure they are both always pulled for lists.
62. Sarah and Victor Kovner (New York)
63. Sarah and Victor are very good organizers and are hosts of our Women’s Issues Conference.
64. They are good friends with Anne Hess and Craig Kaplan
65. Make sure they are both always pulled for lists.
66. Daniel Simon (New York)
67. Daniel likes to attend DCCC events and he will also travel to events in DC. He is a Speaker’s Cabinet member every other year and then can do about $15,000 in the other year between candidates and DCCC.
68. Jack Hornor (Western Massachusetts)
69. Jack is a new donor to the DCCC this cycle. He was not aware of the limits in January of 2014 and so he maxed to the DSCC and then only was able to give us $9,800. He apologized and said that he would rather give to us and so he gave the remaining $22,600 to candidates to make up for it.
70. Now that the limits are gone Jack should be asked to renew his membership early in 2014.
71. He spends the winter travelling, but does have a home in Florence, MA and on the Cape. His family has a home in Osterville, MA and so he was very excited to attend the event hosted by the Schuster’s in 2013.
72. He does not like to travel for events outside of Massachusetts, but he should be asked about Napa. He did not want to attend this year, but make sure you circle back around with him just in case.
73. Don Migliori (Rhode Island/ Trial Lawyers)
74. Don is a Trial Lawyer, but does not usually come in with the Trial Lawyer money or through that event in the summer. Don is able to be a Speaker’s Cabinet Member and can raise a Speaker’s Cabinet check. He may be a good small coffee or dinner host because I think he could get to $64,800 with all the lawyers at his firm.
75. Woody Kaplan (Boston)
76. Woody has the capacity to be a Speaker’s Cabinet donor. He maxes to the DSCC and says that he is always thinking about doing the same to the DCCC. He is currently a Chairman’s Council member.
77. David Belluck (Boston)
78. David is very close with Rep. Kennedy.
79. He used to be very involved, but has cut back since his divorce.
80. He should be asked each and every time to max out and join the Speaker’s Cabinet that the Leader is in Boston.
81. Kristin Mugford (Boston)
82. Kristin works with Jonathan Lavine and has the capacity to be a Speaker’s Cabinet donor. She should be continued to be on the list. She also may be a good meeting prospect for the Leader.
83. Paul Donahue (New York)
    1. Paul is a donor that comes in through Rep. Jeffries. He is a $10,000 donor over all and usually gives in $1,000 and $2,500 chunks. If you can invite and include him in things you should try. He is great.
84. Susan Mandel (Greenwich)
    1. Susan Mandel is a Rep. Himes donor who does not like to be solicited. She also gives once per cycle not per year. She should be invited to Connecticut, Napa, and NYC events.
85. Faith and Dick Morningstar (Boston)
86. They are not as big as the once were in the political world, but just be kept on the list for Boston. They might change their minds. They also are reached out to by the Mid Atlantic team so check with them when you reach out.
87. Stephen Andrus (Boston)
    1. Stephen is hard of hearing and does not like to talk on the phone. All communication should be through the mail. He is very old, so asks should be made early in the year.
88. Heather and Chuck Campion (Boston)
89. Heather and Chuck have stated that they are interested in contributing to the DCCC and joining the Speaker’s Cabinet. They were not able to attend any of our Boston events this year and then Chuck had to have back surgery in the fall. They should be asked every time the Leader is in Boston and would also be a good meeting possibility in Boston.
90. Susan and Phil Ragon (Boston)
91. Their son got married in July 2014. They said they were sitting this year out because of that.
92. Cynthia Ryan (Africa)
93. Cynthia is the daughter or Vin Ryan and Carla Meyer.
94. She is currently living in Africa.
95. She sometimes gives to the DCCC herself and in 2013 she attend the Napa Valley Issues Conference and brought Rep. Tulsi Gabbard as her guest.
96. Gloria and Bud Rose
97. Gloria and Bud were new donors in 2013 for the Boston POTUS event. They were reached out to again in 2014 and Gloria said that Bud was not in great health and so they were cutting back on their giving to deal with it. I think that in 2015 they should be approached again, but not pushed too hard.
98. Cathy and Fritz Folts
99. Cathy and Fritz were new donors in 2013 for the Boston POTUS event. They were reached out to again in 2014, but were not responsive. I think we should keep trying in 2015 if we get another big event in Boston again. They seemed to like it.
100. Joanne and Paul Eggerman (Boston)
101. Paul and Joanne are raisers or could be raisers in Boston. They have not raised in a while for the DCCC, but are double maxers. They should be asked to host an event or raise for an event. They like the Leader a lot and if she called and asked I think they would have a hard time saying no to her.
102. Art Segel (Boston)
103. Art is married to a judge and so is unable to attend events with the President. Art likes to attend larger events and so he should be asked. He has the capacity to be a Speaker’s Cabinet Member, but usually gives less. You have to find the right event for him to give to. He is able to take his kids or sister to events if his wife is unable to. He is close with Rep. Kennedy and also knows Arnie Hiatt.

**Member of Congress staff you should introduce yourself to and know**

1. Julia Hoffman with Reps. Kennedy and Clark – Fundraiser

[hoffman@4cpartnersllc.com](mailto:hoffman@4cpartnersllc.com), 617-303-0346

1. Lee Slater – Rep. Larson – Chief of Staff

[slater.lee@gmail.com](mailto:slater.lee@gmail.com), 202-870-9542

1. Jen Frost with Reps. Meng and Lowey – Fundraiser

[jennifer@frostgroup.net](mailto:jennifer@frostgroup.net), 202-285-0966

1. Mike Iger with Rep. Maloney – Chief of Staff

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**Finance Plan**

The finance plan for 2013 may be found here: [S:\Northeast\Northeast 2013-2014\2013-2014 NE Master Money.xlsx](file:///S:\Northeast\Northeast%202013-2014\2013-2014%20NE%20Master%20Money.xlsx)

The finance plan for 2014 may be found here: [S:\Northeast\Northeast 2013-2014\2014 Master Money.xls](file:///S:\Northeast\Northeast%202013-2014\2014%20Master%20Money.xls)

**Feedback**

The new pod structure that was designed in January 2014 I do not think was useful for the finance department. I think that the best asset for finance is the other directors and assistants and I felt as though with the new pods I was very isolated from the rest of the finance department. We all work on a lot of the same events or events that are similar and so being able to talk to the different directors is very helpful at times to bounce ideas off of. The new pod structure did not make this easier and I found made it harder because everyone was so spread out. If I had a quick question I would gchat other directors instead of having a conversation in person, which I found to be not as effective. I also felt as though the pods did not have a lot to do with finance. It was nice at times to have all of the information about the goings on for the different campaigns and races, but for the most part it was very frustrating. The Northeast has a lot of older donors as does the rest of the country. The noise level in the Northeast pod was much louder than other pods due to specific work styles from certain members of the Northeast pod. A lot of people thought that it was funny how loud it was, but I found it to be very distracting and also very hard to hear my donors or talk to them when there was constant yelling. It was just disrespectful how their work style was laughed at and able to go on at the cost of everyone else in the pod and area. Sometimes people in South pod commented about how loud it got in our pod. I felt like this was an issue that was never taken seriously. I think that if the pod structure continues, which I am sure it will because I did see that it worked in a lot of cases, that conversations need to be made with the whole staff about noise level and being respectful of others working in your pod. By the end we had worked out a system where they would talk from the corner which helped, but it should never have gotten that far.

A separate issue I think is also in the structure of assistants. I came into the DCCC with an assistant already here. I think that my first assistant was good, but I think that he always had a chip on his shoulder that he was not made Finance Director. I tried many different ways of interacting, but I do not think we ever found a way to really both do our best work. I wish that if I had to do it again that I had sat him down and had a conversation saying that we either had to figure out how to make our situation work or that I would consider finding a new assistant. It was not fair for him, the DCCC, or myself. Everyone got cheated by the situation because I was not able to get him to focus on our daily tasks. I think that having an assistant that you can trust is a very key part of the Northeast region. There are so many events and meetings that constantly pop up that if you are fighting all the time on getting just the basic tasks completed you are not going to be able to be successful on the larger tasks or events as a whole.

I feel as though I should have spoken up more about both of these issues, but did the best I could at the time. Looking back I think I would have asked for help earlier to see if there were any other options then what I was able to do on my own.