Memorandum

11/14/2012 10:51 AM

To: Missy Kurek & Stella Ross

Fr: Dan Boysen, West Finance Assistant

Dt: November 15, 2012

RE: 2011-2012 Finance Assistant Exit Memo

**Position & Responsibilities**

Overview:

The 2011-2012 West team consisted of a Director, a Deputy Director and a Finance Assistant and was responsible for major fundraising in California, Arizona, New Mexico, Colorado, Idaho, Utah, Wyoming, Montana, Alaska & Hawaii. Midway through this cycle the Midwest Team took on all fundraising events and meetings in Washington & Oregon and Team South adopted Nevada. Team West continued to mail/email solicitations to these states but we did not work with the Members or fundraisers from these states.

The Finance Assistant’s main responsibility is to assist the Director and Deputy Director in the day-to-day operations and implementation of the finance plan as well as taking the lead on his or her own fundraising events. The assistant is focused on ensuring the accurate processing and tallying of contributions, data base and donor maintenance and call sheet updating occurs regularly to ensure optimal performance of the West Finance team. During the 2012 cycle, the assistant took on fundraisers and meetings in Colorado.

**Basic Operations of an event consisted of:**

* Confirming dates with the Leader’s Office, Hosts, Members of Congress and any applicable raisers
* Assuring that all pertinent event information be sent to the Leader’s office for the Longterm and confirming daily, that the information was put on the Longterm.
* Drafting and working on invitations and pushing them through the approval process
	+ Needed to get approved by Finance Dept, Legal, Leader’s Office, Hosts and Members
	+ Anyone’s name that appeared on an invitation needed to be vetted and also needed to approve their name as listed to avoid any major problems
* Creating the fundraising solicitation lists and sending out mailings, overnights, & emails
* Calling through members’ offices to engage them in raising for the events
	+ Making call sheets for any Members who agreed to help raise, including targeting out specific Members for specific donors based on issues, past giving history, location, previous outreach etc.
* Encouraging hosts to make calls to their networks, sending blank invites to have them put personal notes inside, getting any talking points/draft emails/DCCC email addresses
* Prospecting using CQ Moneyline & WealthEngine
* Creating call sheets for Leader Pelosi
* Calling through our donor lists to make sure they received the invitation and to give a personal invitation via phone to attend the event
* Sending personal emails & overnights to top contributors who normally don’t respond to blast email solicitations
* Prepare all talking point requests, background briefings (including donor capacity), financial spreadsheets, and thank you briefings
* Create nametags, place cards, seating arrangements, check-in lists, escort cards, contribution forms
* Follow up on any problem checks that come in at the door
* Conduct any follow up calls needed for checks that didn’t come in at the event
* Sending a thank you Orchid from Leader Pelosi to all hosts
* Any other necessary tasks that the specific event requires

**Quarterly Renewals:**

Every quarter the region does a quarterly renewal through a mass mailing. These have proven to be successful for the West Region, bringing in upwards of $30,000, especially as we got closer to the election. West mailings usually consisted of upwards of 1,500+ pieces each time. However, we also targeted out Speaker’s Cabinet renewals and sent these as overnights (using Next Day Air Saver). This proved to be fruitful with a follow-up phone call.

**Donor Maintenance**

As many of the West donors are close with the Leader or are influential members of their community, it is important to make sure the DCCC and the Leader acknowledges any substantial changes in their lives (birth of a child, marriage, death in the family, recipient of a prestigious award, etc). We usually send an Orchid with a note of congratulations, thoughts and prayers or any other message that fits the occasion. Also, for any event that the Leader comes to we always send an orchid plant to the hosts and any top raisers.

**States & Fundraisers**

**COLORADO**

The assistant is often asked to assist the Deputy Director in the managing of all fundraisers and meetings for individual donors in Colorado. As a whole, Colorado has a solid base of donors that consistently support Democrats but there are very few who consistently contribute at the max-out level to the DCCC.

Every year the DCCC hosts 4 events in Colorado and often during the Chairman or the Leader’s travel across the country multiple one-on-one meeting times arise to target high-dollar donors. Typically in March, the Colorado Democratic Delegation puts on an event in Denver, and the three members raise contributions from their Denver area donors. This event is usually augmented by meeting time for Leader Pelosi the day of the event. The combined event and meetings typically raises $100,000 for the DCCC.

The evening of the Delegation Lunch, Candy & Charlie Ergen, CEO’s of EchoStar put on a small intimate dinner organized by EchoStar’s Stanton Dodge. Stanton easily raises $100,000 for this event every year in a combination of individual and PAC contributions, including a max out contribution from the Ergen’s. Whenever the Colorado trip is scheduled the assistant should immediately call Stanton to see if he or the Ergen’s are available for their annual event, and Stanton essentially does the rest of the work.

In August, Congressman Polis hosts 2 events in Boulder for the DCCC, a low-dollar happy hour reception and a high-dollar dinner. Starting in 2010, the low-dollar event has been very successful at raising $20-30,000 from almost entirely low dollar donors. The 2010 & 2011 hosts Diane Rosenthal & Dan Friedlander were fantastic hosts that also contributed at the low-dollar level and the Leader became very close to Diane. In 2011, Dan was diagnosed with cancer, and in the summer of 2012 passed away. In 2012, Congressman Polis brought on new hosts, Catherine & Dr. Bob Murphy. They have a fantastic location, covered the event costs and expressed interest in contributing directly to the DCCC in the future. The Murphy’s had no political giving history but were extremely accommodating.

 The night of the low-dollar event, Congressman Polis hosts a high-dollar smaller dinner with his friends and family. Congressman Polis personally invites all attendees and usually asks for between $5-10,000 per person/couple. The event raises between $80-100,000 for the DCCC through PAC and individual contributions. There has been no set location for this dinner, in 2011 Congressman Polis hosted the dinner at his apartment and in 2012 Cathy Carlson & Tom Galloway hosted the dinner.

**Congressman Polis**: Congressman Polis is the strongest fundraiser in Colorado and has a both a significant base within the state but also a national network with hubs in San Diego (where his mother and father live) and in New York City. Mr. Polis is extremely goal oriented and when given a specific number to raise to he works extremely hard to hit that number. He also will call almost any person you put in front of him, including prospects. Generally, he likes to raise contributions into one of his Victory funds (Majority fund goes directly to the DCCC and the Victory Fund goes to Red2Blue candidates). Mr. Polis however does not like to work too far in advance, he often prefers to hold on calling donors until at maximum 3 weeks out from the event which often leads to a bit of last second scrambling. It is best for the assistant to request call time when he is in DC and push him to make as many calls as possible because often times he skirts his call time in Colorado. Oftentimes Congressman Polis seems hesitant to make a larger ask of an individual often settling on a $5,000 or lower target and promising to go back for more later. Pushing him to shoot a bit higher would make event goals easier to reach.

Congressman’ Polis’s staff is great to work with and extremely responsive. His Finance Director, Kate, has many Colorado connections and can be relied on to keep Mr. Polis on target and goal focused. Kate is very focused on keeping close track of all of Mr. Polis’s raising from a variety of different places so it is key for the assistant to be very careful with event totals and to be aware of what other regions Mr. Polis is also raising for.

**Congresswoman DeGette:** Congresswoman DeGette is based primarily out of Denver and has historically taken more of a lead for the Delegation event and Denver based fundraising. She has a very loyal fundraising base and has a large base of women donors in Colorado and has hosted a women’s breakfast for the DCCC in 2011. Historically, Mrs. DeGette has been difficult to motivate in the past two events and often refuses to make calls and raises in the area of $15,000 max. She has a revolving door of Finance Directors so it has been difficult to create a solid working relationship. Doing heavy prospecting and call sheet creation was the best way to keep the Congresswoman making calls.

**Congressman Perlmutter:** Congressman Perlmutter had an extremely close race this cycle and did very little raising for the DCCC. Historically he has been very helpful raising contributions and barring another strong challenge he should return to that. His fundraiser, Julie DeWoody is extremely helpful and easy to work with. She made calls for the DCCC Delegation Brunch despite the Congressman being unable to do so.

**Stanton Dodge:** The DCCC has typically asked Stanton to raise $100,000 for this event, but the assistant should push him to raise an additional $50,000 as he raised much more for President Obama in the 2012 Cycle. He is a straight shooter and will be very honest about it, but it’s definitely worth the ask. Stanton has been asked to personally contribute and has said that he doesn’t have the means, but this year he was a max out contributor to the Obama Victory Fund. I think it’s worth a meeting with Leader Pelosi or Chairman Steve Israel to get this contribution from him.

**Candy & Charlie Ergen**: Founders of EchoStar and DishNetwork and have supported the DCCC at the Speaker’s Cabinet level every year the past 3 cycles. They give through their private dinner each year and all correspondence should go through Stanton Dodge.

**Seeme & Dr. Malik Hasan**: The Hasan family is one of the wealthiest in Colorado and has supported both Republicans and Democrats historically. Congressman Polis brought them into the DCCC fold and his staff should always be consultant when dealing with the Hasan family. Typically they join the Speaker’s Cabinet yearly, meaning they view their contribution as going March 2012-March 2013. Their son-in-law Rehan has contributed at the Speaker’s Cabinet level in the past but supposedly does not have the capacity to do so at this point. The Hasan’s have been difficult at times to deal with and must be treated very cautiously, however they love Leader Pelosi.

**Gracie & Bill Carr:** Congressman Polis brought the Carr’s back into the fold in 2011 after they previously had not supported the DCCC since 2008. The Carr’s prefer a one-on-one meeting with Leader Pelosi and have always historically both write max-out contributions. In 2012, Congressman Polis reached out to Gracie who was initially interested in meeting but the Carr’s backed out due to a family obligation from a meeting. They should be the primary meeting target with the Hasan’s in any of Leader Pelosi’s trips to Colorado.

**Noey & Tom Congdon**: The Congdon’s have been long time supporters of the DCCC and typically contribute $10,000 yearly but have the capacity to max-out. For any events in Denver the Congdon’s should be one of the first calls and should always be seated near Leader Pelosi. They have also been receptive to one-on-one meetings with the Leader in the past and that has resulted in a larger contribution.

**Cathy Carlson & Tom Galloway:** Cathy & Tom have been long time supporters of the DCCC but have often backed out of commitments or take long periods of time to fulfill their pledges. Tom is very close with Congressman George Miller and Congressman Polis and one of those two usually solicits contributions. Cathy & Tom hosted the Polis high-dollar dinner after committing to write 2 max contributions but only ended up making 1. Cathy was very helpful in raising other contributions for that event and is very well connected in the Colorado donor network.

**Reuben Munger**: Reuben was a DCCC Speaker’s Cabinet member when he lived in Boston, but moved to Colorado in 2010. He has continued to give at the level to President Obama and the DSCC but dropped out of the fold for the DCCC. In 2012, Congressman Polis connected with him and he contributed $5,000. He should be courted to meet one-on-one with Leader Pelosi but he is difficult to get a hold of.

**Pat Stryker & Al Yates:** Pat is one of the wealthiest residents of Colorado and has supported the DCCC consistently throughout the past. She made President Obama her priority in the 2012 cycle so she only made a small contribution to the DCCC but she should be one of the first choices of calls for Leader Pelosi or meetings. Al Yates is her political advisor and handles all her contributions.

**Tim Gill**: Tim is one of the largest national LGTB donors and used to support the DCCC at the Speaker’s Cabinet level. He very rarely comes to event or does meetings and typically all fundraising calls needs to go through a member of his political affairs team.

**Merle Chambers & Hugh Grant:** Merle was a Speaker’s Cabinet level donor 8 years ago but have not been hear from for quite some time until 2012, when Congressman Polis solicited a meeting with her and Leader Pelosi. As a result of that call her husband, contributed $20,000 to the DCCC. She should be aggressively pursued for a Speaker’s Cabinet contribution in the next cycle.

**Patti & Greg Hueni:** Patti & Greg were new donors to the DCCC in 2011, and were introduced by Congressman Perlumtter. They met with Leader Pelosi and both contributed $10,000 and said they were hesitant to be Speaker’s Cabinet members because they were focused on as eating disorder foundation they had just started. Their daughter was diagnosed with an eating disorder, and now sits on the bored and is very active nationally for that cause. The Hueni’s met with Chairman Israel in 2012, and committed to contribute $20,000 again in 2 installments, and when prompted a few months later fulfilled that commitment. The Hueni’s are incredibly nice and very easy and upfront to deal with. However, any correspondence with them should be preempted by a call to Julie DeWoody with Congressman Perlmutter. They are very close with Perlmutter and usually drop off their contributions to the DCCC at his office and Julie mails them to DC. They expressed some donor fatigue at the end of the 2012 election cycle so waiting a bit to solicit them in 2013 should be best. Leader Pelosi is very aware of their work on eating disorders so if they ever attend events with her you must include their recent activities with their foundation because she will talk with them about it.

**Susan & Harry Frampton:** Harry supported the DCCC at the $5-10,000 level from 2005-2007 and then unexpected joined the Speaker’s Cabinet in 2010 as a result of a Napa mail piece. Otherwise he has stayed off the DCCC radar since then and has been unresponsive to all forms of follow up. He lives in Aspen which is a trip from the Denver area but closer to Boulder so only really consider him for Boulder events. Susan & Harry supported President Obama at the Speaker’s Cabinet level in 2011 and 2012 and should be considered a large target in 2013. Congressman Polis knows harry and is considering him one of his top targets for DCCC max-outs in 2013 and Mr. Polis should be reminded of this early on in 2013.

**Elena Amsterdam & Robert Katz:** Robert is the CEO of Vail resports and is one of the largest democratic donors in Colorado. He has historically always supported the DCCC at the $10-15,000 range. In the 2011-2012 cycle he notified DCCC staff that President Obama was going to be his focus this cycle and Elena made a contribution of $5,000 to the DCCC in 2012. He should be a top target for a meeting with Leader Pelosi whenever she is in Colorado and should be a max out ask.