interoffice memorandum

from: Dan Boysen, West DCCC Finance Director

date:

subject: End of Cycle Memo

**Overview:**

The West Finance Director position is the head of a three person DC based team (Deputy Finance Director and Finance Assistant) as well as 2 off site consultants based in California (San Francisco & Los Angeles) focused on raising high dollar contributions from the western region of the country for the DCCC. The states that fall under the “west” responsibility are: California, Colorado, Arizona, New Mexico, Oregon, Utah, Nevada, Idaho, Wyoming and Montana. Although all regions of the DCCC are vital and important to overall fundraising success the West has both the responsibility and privilege of raising contributions from the most fertile area for democrats. Many of the highest dollar California donors have been supporting Leader Pelosi and other members of House Democratic leadership for decades and are long time personal friends or business associates. While the sheer volume of donors with large capacity is a welcome sight it also comes with the task of managing, cultivating and paying special attention to donors that may in fact be Leader Nancy Pelosi’s neighbors or best friends of 30 years.

The primary day-to-day responsibilities of the West Finance Director center around the continued updating and implementation of the overall west finance plan for the month/quarter/cycle. The Director is expected to create and maintain a central document where totals are projected for all upcoming events that hit or exceed monthly and quarterly goals set by the National Finance Director. The west region is often not event heavy, but instead offers several large events each month or quarter where the bulk of money is raised. A copy of the most recent West finance plan is attached to this exit memo.

I typically liked to start my day by meeting with the West team and asking for progress reports on task began in previous days, disseminating updated to-do lists and discussing big picture items. To increase transparency and eliminate information gaps I tried to give the Deputy Director and assistant an idea of where we stood with outstanding pledges, upcoming events, potential call time, and distance towards goals. I felt that this increased the feeling of inclusivity amongst the team and provided context towards the bigger picture. A crucial responsibility of the west director is to delegate tasks, and in some cases, events, to other team members and continuously check in to make sure tasks are completed.

Another key duty is the management of the DCCC’s 2 California based consultants, Lisa Presta in San Francisco and Terri New in Los Angeles. Both consultants are fantastic assets to the DCCC and have worked with Leader Pelosi for years. They each have their own style are respond to different forms of outreach and motivation. The West director must keep in daily (and sometimes hourly) contact with the consultants as well as consistently track the contributions they raise and progress towards their individual goals. I will touch on best practices with each consultant below:

Lisa has worked with Leader Pelosi and the DCCC in San Francisco for almost 10 years and has very close relationships with some of the DCCC’s largest donors. Lisa is assigned quarterly goals by the National Finance Director and she negotiates those goals with the Director directly. Oftentimes Lisa liked to consult with me before negotiating her goal to get a feel for where we were for the cycle, outstanding pledges, upcoming events and how many normal max out donors with the ability to still contribute remained. I prepared scratch work estimates for her quarterly plan to assist with this process as well as to get her thinking about targets for the quarter. Lisa is responsible for following up on all of Leader Pelosi’s calls to Northern California donors, staffing the Leader at Northern California events as well as setting up finance meetings. She is very easy to work with, friendly and loves the DCCC team but requires vigilant follow up. She can sometimes forget to follow up with donors/pledges or drop off the grid entirely if the Director does not check in consistently. Although at first it may appear like you are badgering but Lisa has no problem with it and is always thankful for the reminder. Leader Pelosi and Lisa are also close and the Leader at some points will call her directly for questions and to check in on events. Therefore it is crucial for the director around the time of events to make sure Lisa has the most updated copy of an event tracker before the director leaves the office. I would strongly recommend the West Director keeping and updating event trackers and not off loading this to Lisa. In the past she has managed event spreadsheets, but due to the time difference/her other responsibilities and other factors I found it to be much safer to maintain it myself. Lisa is less conscious of her quarterly goal, however nearing end of quarter it is best to reminder her of how close (or far) she is from her goal as that will be a great motivator for her do another round of follow up or asks.

Terri has been one of my favorite people to work with at the DCCC and has been working with the Leader for over 13 years. Differing from Lisa, Terri has a multiple person team and handles numerous other clients, both local and national, and therefore can be at times very busy and not as responsive. In addition, Terri is the political director for Speaker’s Cabinet donor, Cindy & Alan Horn, and will handle facilitating their contributions each year as well as events at their home etc. Terri can tend to get very stressed out and extremely nervous about goals/end of quarter time/events. The best approach I have found towards best handling this situation is to walk her through all options, next steps and potential solutions to issues and then split how to accomplish those tasks. Terri is responsible for all call follow up from Leader Pelosi however I found it best to split this with her to ensure it all gets done. Terri is extremely goal conscious and will consistently ask for updates on her progress towards quarterly goal as well as a plan towards raising the remaining amount. I found it best to keep a separate tracker for quarterly money for Terri that listed money in, hard pledges as well as outstanding pledges that we are working on (and who is following up with them). This system usually answers most of Terri’s questions before they are asked as well as continuously prompts her to follow up with certain targets.

Another crucial role of the West Director is the targeting of high dollar donors and prospects for solicitation by DCCC staff and House Democratic Leadership. It is absolutely necessary to maintain an updated prospect list for both Northern and Southern California at all times for both event mailings/email blasts as wells as calls from Leader Pelosi. I often tasked the Finance Assistant will updating and adding to the prospect lists about a month out from an event. Typically we prospected from DNC, DSCC and SuperPAC donors to put together these lists. As events drew closer the Director is expected to coordinate with the appropriate consultant (if in California) to put together a series of call targets for Leader Pelosi or other Members. Once these tiers are created it is a team effort to get the call sheets (the majority of which already exist from previous events) updated/created and then submitted to the National Finance Director for review. These call sheets will go directly in front of Leader Pelosi so it is necessary for all information on any page to be 100% accurate, updated and the phone numbers to be checked for accuracy.

The West Director is also responsible for the successful staffing completion of fundraising events in the region. This typically entails coordinate staff and volunteers to understand event logistical flow, an efficient and hassle free guest registration and an on-time speaking program. The director will often work with the respective consultant on a seating chart of those events that have fully assigned seating, which often is a time intensive and cumbersome process that goes through several rounds of edits.

Due to the sheer size and volume of the work load for the western region, the West Director typically off-loads certain areas to the Deputy (and in some cases the Assistant). In the 2014 cycle, the deputy director ran events in Colorado, Arizona and Portland. In some cases, once proving capable and up to the challenge, the West assistant can take on events with supervision such as New Mexico.

The West region in the 2014 cycle hosted 35 fundraising events or days of meetings. Annual events were held in California, Arizona, Colorado, Oregon and New Mexico and in 2013 the DCCC expanded its base into Utah and established a collection of new Speaker’s Cabinet donors.

In the 2014 cycle the West Region raised a total of $13,420,776 for the DCCC and $404,764 for DCCC priority candidates. These totals represent a 139% increase in DCCC contributions raised from the 2012 cycle and made up 41% of the DCCC’s national fundraising team’s totals. On average, the West team raised 125% of its quarterly goals throughout the cycle.

**Regional Events Recap:**

**January 2013 Utah Finance Meetings**

Leader Pelosi’s daughter, Alexandra Pelosi, was doing a showing of her most recent documentary during the Sundance Film Festival in Park City, Utah and the Leader decided to travel to the area for the weekend, the first time she had gone to the state in several years. The West team prospected the area as First Lady Michelle Obama had hosted an event in Salt Lake City during the 2012 campaign so a small collected of high dollar donors existed. The west team set up 3 prospect meetings with Lessing Stern, Eric Kamerath and Donna & Michael Weinholtz. These meetings resulted in $129,600 for the DCCC in Q1 2013. Lessing Stern and Donna & Michael Weinholtz contributed $32,400 each to the DCCC in 2014 as well without a direct meeting with the Leader. If it can be fit into the Leader’s travel schedule, a return trip to Utah in early 2014 for a series of finance meetings would be ideal. Due to the small democratic donor pool in Utah a full fledged fundraising event would be difficult without a strong raiser to pull in support.

**Q1 California Political Updates**

In January and February of each year Leader Pelosi hosts Political Updates (along with the DCCC Chairman) in San Francisco and Los Angeles for Speaker’s Cabinet and high dollar donors in the area. These events have no contribution required and serve as a means to update the DCCC’s top donors on relevant races and the political climate nationally. The San Francisco Political Update is typically hosted a hotel and is usually a lunch. The Leader also sometimes likes to use this event as also a “thank you” event for Speaker’s Cabinet donors from the previous year. The Los Angeles Political Update is usually held in a donor’s home, hosts in the past have been Cheryl & Haim Saban and Lyn & Norman Lear. When scheduling begins for the Leader’s 2015 travel the West Director should find applicable dates for these events and work with corresponding consultants on hosts and outreach. Typically Leader Pelosi will host 4-5 finance meetings around these political updates to raise contributions from annual Speaker’s Cabinet donors as well as set up potential events/hosts later in the cycle.

**April 2013 Getty Dinner**

Leader Pelosi’s signature event of the year nationally is her Dinner at the home of Ann & Gordon Getty in San Francisco. This dinner is one of the highest raising events of the year and is attended by most of the largest DCCC donors in the Bay Area. The hosts, Ann & Gordon will be covered in a later section of this memo. In 2013, this event was slightly altered as President Barack Obama offered to headline the event, the first DCCC fundraiser he would attend since 2010. This event raised $1.87 million of the DCCC and had over 80 attendees. Typically the Getty dinner benefits the Nancy Pelosi Victory Fund but with the inclusion of President Obama no contributions could go towards Victory Funds. The event included a photo line with President Obama, dinner and a Q & A session with the President.

**April 2013 Reception at the home of Kat Taylor & Tom Steyer**

In conjunction with the April Getty dinner, President Obama agreed to also attend a reception on the same day to maximize his fundraising impact. Leader Pelosi reached out to Tom Steyer to ask him to host this event and raise contributions from his network. He agreed and actively reached out to his network of primarily environmentally focused donors. Kat & Tom will be covered more in-depth in a later section. This event offered a general ticket, a photo line as well as an intimate 30 person mix and mingle clutch with the President. Tom Steyer specifically reached out to targeted donors in his network and raised $32,400 from them individually to attend this clutch which focused primarily on environmental issues. This event raised over $1.15 million for the DCCC and had 100 attendees.

**April 2013 Dinner at the home of Cindy & Alan Horn**

This dinner was the first DCCC fundraiser in Los Angeles of the 2014 cycle. Leader Pelosi asked Cindy & Alan Horn to host this event and write/raise $100,000 for the DCCC. In addition, Congressman Xavier Becerra pledged to Leader Pelosi to raise $200,000 for this event in lieu of hosting his own event. This dinner raised over $740,000 for the DCCC. Congressman Becerra only raised $46,000 towards his commitment while Cindy & Alan Horn raised $107,300 for the DCCC. Cindy & Alan Horn will be covered more in-depth later in this memo.

**June 2013 Dim Sum Reception with Congresswoman Judy Chu**

Congresswoman Judy Chu offered to host a Dim Sum reception with her supporters and members of the Los Angeles Asian American community similar to an even she hosted in 2010. Congresswoman Judy personally raised all the contributions for this event and handled all of the outreach to the community. The event had over 500 attendees and the ticket prices went down to $150 per person. Logistically the event is very difficult due to the sheer size of attendees as well as tracking the consistent changes and pledges. The event raised over $150,000 for the DCCC from almost entirely new donors. Although this event is a significant amount of work for a smaller pay off, it should be a priority to get scheduled in 2015. The West Director should have the Chairman approach Congresswoman Chu about hosting the event early on in the cycle and raise $150,000 for the DCCC. The Congresswoman has previously expressed that she likes to do this event early in the cycle to hit her DCCC raise goal and is not interested in doing multiple versions of this event. Congresswoman Chu’s fundraising team is easy to work with, responsive and hosts several of these events each cycle for the Congresswoman’s re-election campaign so have familiarity with the difficulty in execution. Congresswoman Chu should be specifically asked to raise a max out contribution from Ding Hua Wang for this event.

**June 2013 Silicon Valley Reception**

Congresswoman Anna Eshoo hosts an annual DCCC fundraiser in the Silicon Valley area with members of the tech community and her long time supporters. Leader Pelosi typically reaches out to Congresswoman Eshoo personally to set up this event and asks her to raise as much as she can for the DCCC. Typically Congresswoman Eshoo raises between $200,000-$300,000 through this event from a mixture of individual, PAC and member dues contributions. Congresswoman Zoe Lofgren rarely assists the DCCC for this event despite requests from DCCC staff. This particular event was at the home of Liz & Rick Kniss, long time friends of Congresswoman Eshoo. Liz is a Palo Alto city councilwoman. Congresswoman Eshoo is very helpful for the DCCC and is willing to make almost any call but oftentimes takes a bit of prodding to get started on the event and usually raised a bulk of the contributions in the last 10 days.

**June 2013 San Diego Dinner**

Leader Pelosi hosts an event in San Diego typically once a cycle to raise contributions from supporters in that area. In 2013, freshman Congressman Juan Vargas offered to host a DCCC event and raise $100,000. He got Marcy & Jeffrey Krinsk to host the event however did not make many calls or hit his $100,000 raise goal. The event raised over $124,000 for the DCCC however several large chucks on those contributions were raised through calls from Leader Pelosi. Marcy & Jeffrey did not contribute personally for the event but instead in-kinded the costs. The local members were asked to help raise contributions for the event but only Congressman Scott Peters was able to do so.

**July 2013 Dinner at the home of Wendy & Barry Meyer**

Leader Pelosi asked Wendy & Barry Meyer (who will be covered in more detail later in this memo) to host the second Los Angeles fundraiser of 2013 at their home and raise contributions from the entertainment industry. Leader Pelosi also asked former Congressman Howard Berman to reach out to his network to raise contributions for the DCCC. He was able to raise $32,400 from Jane & Marc Nathanson. Wendy & Barry personally contributed $44,800 and raised $32,400 for this event. The Meyers are great hosts, easy to work with and love Leader Pelosi. Overall the event raised $550,000 for the DCCC.

**July 2013 Marin County Reception**

In early 2013 freshman Congressman Jared Huffman pledged to Chairman Israel that he would host a DCCC event in his district and raise $100,000 for the DCCC. He got Steve Silberstein (who will be covered later in this briefing) to host the event and actively put together a host committee to help in his raising efforts. The DCCC had previously hosted Marin County events at Steve’s home in previous cycles but most of those events were low raising and consisted primarily of Silberstein family members. The event raised a total of $176,000 for the DCCC from almost entirely new donors and supporters of Congressman Huffman. The Congressman’s team was very easy to work with, and he was very proactive in calling and raising contributions early and often for the event.

**Please Note:** Congressman Huffman committee to Chairman Israel in 2014 to host another event in Marin County in Q3. However as DCCC attempted to work on securing a date the Congressman’s staff informed us that Huffman had too much on his plate and his donor base was tapped out. The Congressman personally informed the Chairman that he was unable to fulfill his commitment and pledged to do another even in 2015 for the DCCC.

**September 2013 Sacramento Reception**

Congresswoman Doris Matsui hosts an annual fundraiser with her supporters and donors in the Sacramento area for Leader Pelosi and the DCCC. DCCC staff should reach out to Matsui’s Chief of Staff, Julie Eddie, early on in the cycle to get a feel for when they would like to host the event. They prefer to do the event in September or October. Congresswoman Matsui raises all the contributions for the event and works diligently to hit the $100,000 goal. Lisa Presta is friends with Congresswoman Matsui’s fundraiser so there is great communication and transparency. The usual hosts of the event are Tina Thomas & Bill Abbot. Tina is an attorney in Sacramento and a long time friend and supporter of Congresswoman Matsui. Tina reaches out to her network to help raise contributions for the event and usually contributes $10,000 personally. Depending on the proximity of the event date to the annual DCCC Ultimate Women’s Power Luncheon, Congresswoman Matsui may want to do a 2-for-1 with some of her donors. The 2013 Sacramento event raised $104,000 for the DCCC.

**Please Note:** The 2014 Sacramento Reception was folded into the 2014 DCCC Ultimate Women’s Power Lunch with Hillary Rodham Clinton due to the close proximity time wise. Congresswoman Matsui raised $90,000 for the DCCC for the HRC event and put together several tables of supporters from Sacramento.

**November 2013 Breakfast hosted by Congresswoman Karen Bass & Conway Collis**

Congresswoman Karen Bass and one of her close friends, Conway Collis have hosted several DCCC breakfasts since the 2012 cycle in Los Angeles. Collis is a former hospital chain executive that now runs the philanthropic arm of the St. Johns Wellchild and Family Center. Congresswoman Bass and Conway typically put together a small host committee of others from the health care industry, including Conway’s former boss, Jim Mangia. These events typically do not hit goal and often require the Leader to attend some official side component which takes up more of her time. I would suggest tacking on one of these breakfasts to an already existing trip to Los Angeles (a day of finance meetings for example) to provide a slight boost to the day. The 2013 event raised $60,000 for the DCCC, the vast majority of contributions coming from donors that only give through Conway or Bass. These events usually struggle to hit $50,000.

**November 2013 House Senate Victory Fund Events with President Barack Obama**

President Obama offered to host a joint event for the DCCC and the DSCC in Los Angeles in November 2013.We structured the evening into 2 separate events, a “low dollar” reception at one location and a “high dollar” dinner at a separate location. The DSCC got Cookie & Magic Johnson to host the reception, and Leader Pelosi got Cheryl & Haim Saban to host the dinner. The Reception was structured with low dollar, $2,500 per person tickets, $5,000 for a photo and $15,000 to attend a 20 person clutch with the President. The Dinner was strictly $16,200 per person for a seat at dinner and a photo. Both events sold out despite the close proximity to Thanksgiving and had significant member involvement. Congresswomen, Bass, Chu, Hahn and Roybal-Allard along with Congressman Becerra, Cardenas, Lowenthal, Schiff, Sherman and Takano all raised contributions for the DCCC. Magic Johnson agreed to host the event and contribute $64,800 to the HSVF, and eventually reached out to a few selected people in his network and raised $64,800 for the HSVF. Haim Saban was very hesitant to make calls or raise contributions for this event but made a few selected calls and raised $40,000. Cheryl & Haim contributed $32,400 to the DSCC for the event as they were both already maxed to the DCCC.

**\*Please Note:** Magic Johnson has one of the best networks in Los Angeles and should be approached to do another event for the DCCC. I would suggest having Leader Pelosi ask Maxine Waters to reach out to Magic to host an event as he is close to her and hosted a major fundraiser for her.

All contributions for the event were split 50/50 with the DSCC; however the DCCC did raise some contributions directly to the DCCC for the event from donors unable to attend. The event raised a total of $1,689,570, of which the DCCC received $839,985.

**January 2014 DCCC Women’s Lunch with First Lady Michelle Obama**

This event was previously scheduled to occur in September 2013 but was rescheduled due to the government shutdown as the First Lady would not attend a fundraiser during that time. This event is the annual DCCC Ultimate Women’s Power Luncheon that the Leader hosts every year in San Francisco. This event offers a lower ticket price ($500 seats, $5,000 tables) typically, and a core group of table hosts and raisers assist the DCCC for this event every year. With the First Lady attending we altered the format to include a photo line for $10,000 per person and a clutch for $32,400 per couple. The event also included a musical performance from Joan Baez. The lunch raised a total of $1,219,368 for the DCCC.

**April 2014 Getty Dinner**

The 2014 Getty dinner included special guest Vice President Al Gore and discussion focused heavily on environment issues. The event benefited the Nancy Pelosi Victory Fund, with a ticket price of $42,600 per couple. The breakdown of this contribution is $32,400 to the DCCC, $5,200 to Nancy Pelosi for Congress and $5,000 to PAC to the Future. Going forward DCCC staff should reach out to Beth Townsend, Ann Getty’s niece and house manager, to find open dates in the Getty’s calendar for April and begin proposing those dates to the Leader in late January or early February. Getting that invitation out and in circulation early makes raising Q1 contributions significantly easier as many annual Speaker’s Cabinet donors see that invitation as their cue to give. This event raised $1,320,800 including $1,063,500 for the DCCC, $83,200 for NP4C, $120,100 for PTF and $49,000 for DCCC priority candidates.

**May 2014 House Senate Victory Fund Dinner at the home of Cindy & Alan Horn with President Barack Obama**

President Obama again offered to host a joint DCCC/DSCC event in Los Angeles but declined to do a 2-part event due to logistical issues. Leader Pelosi had previously met with Cindy Horn earlier in January and asked her to host the DCCC Ultimate Women’s Power event at her home and raise $100,000 for the DCCC. The Leader asked her to instead host this event and raise $200,000 for the HSVF. Cindy agreed and also got Alan to make calls for the event. She and Alan raised over $300,000 for the DCCC including a personal $32,400 contribution to the DSCC (as they were maxed to the DCCC) and $20,000 from her children. This event raised $1,452,200 for the HSVF of which the DCCC received $927,900.

**May 2014 DCCC Lunch at the home of Joan & Irwin Jacobs with President Barack Obama**

President Obama offered to host a DCCC event in San Diego the day following the HSVF Dinner in Los Angeles. Leader Pelosi approach Joan & Irwin Jacobs (will be touched on in more detail below) to host the event at their home and raise $200,000 for the DCCC. The event offered a 20 clutch for $32,400 per person or $10,000 per person for a photo and a seat at lunch. The Jacobs family contributed over $250,000 for the event, including $64,800 personally from Joan & Irwin. The Jacobs also raised over $150,000 for the DCCC. Christine Forester, one of President Obama’s largest bundlers in the 2012 cycle, also raised over $250,000 for that event. In total the event raised $841,921 with over 70 attendees.

**June 2014 DCCC Lunch hosted by Congresswoman Dina Titus**

Congresswoman Titus’ staff reached out to DCCC staff to express interest in hosting an event with Leader Pelosi in Las Vegas. The event was schedule for June and the Congresswoman agreed to raise $75,000-$100,000 for the DCCC. The Congresswoman made a series of calls for the event as well as reaching out to several Casino’s for PAC contributions however only raised $52,000 for the DCCC. The Congresswoman’s staff expressed to DCCC staff that the climate for Democrats was not favorable for fundraising and lack of competitive races (this was pre-Horsford jumping onto the map) was not inspiring many to contribute. The next DCCC Chairman should be asked to ask Congresswoman Titus to host another event and raise $100,000 for the DCCC through an event and high dollar meetings. In follow up DCCC staff should stress that the day needs to raise $100,000 or the Leader will not attend.

**July 2014 DCCC Lunch at the home of Judy & George Marcus with President Barack Obama**

President Obama offered to host a DCCC event in the Silicon Valley area for the DCCC and Leader Pelosi called Congresswoman Anna Eshoo to ask for potential host ideas. Congresswoman Eshoo suggested and reached out to Judy & George Marcus (to be covered below) who agreed to host. The event had 2 ticket levels: a $32,400 per couple 20 person clutch and a $10,000 per person photo line. Congresswoman Eshoo raised over $250,000 for the event, and Judy & George Marcus raised over $250,000 including $64,800 from them personally for the DCCC. Several new DCCC donors where brought into the fold such as Drew Houston (Dropbox), Asena & Nick McKeown (investors and Professors at Stanford) and Anne Wojcicki (23andMe). This event raised a total of $1,140,450 for the DCCC.

**August 2014 DCCC Lunch with the Iranian American Community**

Leader Pelosi met Dr. Ashraf Zadshir at an Iranian New Year event in Washington, DC and at that event Ashraf told NP that she would like to host a DCCC fundraiser with the community in the Los Angeles area. The event was scheduled on a trip to Los Angeles for a series of finance meetings and was held at the Riviera Country Club (one of the contributors was a member). The group asked that NP speak on the US policy with Iran, women’s issues in Iran, the Iranian refugee camp in Iraq and the role of women in politics. They group also showed a short video presentation during the event. I worked exclusively with Ashraf in putting together the event, and members of the community raised all the contributions. The event raised $61,500 from entirely new donors to the DCCC, some of which have capacity to make $10,000 + contributions. Ashraf said the group really enjoyed meeting NP and would love to host other fundraisers. The West Director should reach out to Ashraf early on in January 2015 to try to set up a date. The group most likely can’t get to $100,000 but held in conjunction with a series of meetings or another event would be a good boost to a Los Angeles swing.

**October 2014 DCCC Cocktail Reception at the home of Ann & Jim Ginaopulos**

Leader Pelosi began reaching out to Jim Gianopulos in the summer of 2014 to ask him to host an event for the DCCC, which he agreed to do so. However, he went out of the country to Greece for a family vacation and was hard to reach. DCCC staff also coordinated with 21st Century Fox Lobbyist, Rick Lane, on event details but never received a hard date. In late August, Leader Pelosi spoke directly with Jim again and soon after a date for early October was decided upon. In late September, Vice President Joe Biden was also added to the event. The reception was structured with several ticket levels, $32,400 or $10,000 per couple for a photo, and $2,500 per person for the reception. Jim reached out to his network in the entertainment industry and raised over $180,000 for the event. In total the event raised $521,950, including $370,450 for the DCCC, $50,000 in Member Dues and $101,500 for DCCC priority candidates.

**October 2014 DCCC Ultimate Women’s Power Lunch with Hillary Rodham Clinton**

Secretary Clinton offered to attend a DCCC fundraiser for the DCCC in San Francisco, and NP decided to make this event the annual San Francisco Women’s event. Similar to the event with the First Lady, this was structured with general tickets ($500), a table for $5,000, $10,000 per person for a table and a photo, and $32,400 per couple for a table and 2 spots in the clutch. The event saw unbelievable response rates, and due to the size of the response we had to cut off $500 tickets/$5,000 tables and began selling $1,000 tickets and $10,000 tables.Susie Tompkins Buell also actively reached out to her network and raised over $150,000 for the event including a personal $32,400 contribution. The event had over 830 attendees and the ballroom of the Fairmont Hotel was packed. The lunch raised $1,390,675 including $997,675 for the DCCC, $163,500 in Member Dues and $229,500 for DCCC priority candidates.

**Speaker’s Cabinet Donors (that require notes):**

**Tayyaba Farhat & Kareem Ahmed**

Kareem can on to the political giving scene in 2012 and was a huge donor to Priorities USA and the DNC and eventually the DCCC. He renewed his Speaker’s Cabinet membership in 2013. **However, his company was searched by the FDA and he is currently under a federal indictment. DO NOT SOLICIT.**

**Elizabeth & Wylie Aitken**

Wylie has not contributed to the DCCC since the 2010 cycle but routinely supports other committees at the max out level. He is very close to Loretta Sanchez and the ask should come from her to contributed $32,400 to the DCCC.

**Yoko & Dr. Bruce Allen**

This couple is one of the more mysterious donors to the DCCC. They have only maxed through renewal solicitations and never respond to calls or other forms of outreach. I would suggest sending a targeted over-night solicitation to them near end of quarter with a fake Pelosi signature.

**Sloan & Roger Barnett**

Essentially a lost cause to contribute to the DCCC. NP will not call any more as he has said no so many times.

**Anne Bartley & Larry McNeil**

Anne has been a long time DCCC donor at high levels (her husband does not make political contributions) however dropped of the grid for some time. However she is very close to Congresswoman Donna Edwards (Maryland), who raised $32,400 from her in 2014. **Congresswoman Edwards should ask her to max to the DCCC.**

**Laurie & Bill Benenson**

Laurie & Bill were new donors to the DCCC in the 2014 cycle and are now fully incorporated in the DCCC fold and will be helpful next cycle. Terri New has become close to Laurie and will be able to follow up on renewing their membership. Terri said that she recently spoke to Laurie who told her that they have “recently come into a lot more money” so in the 2016 cycle they should be asked to double max.

**Ralph Bernardino**

Do no waste an NP meeting or call on Ralph. He is not trustworthy to contribute or follow through on his pledges. He should be solicited by other members or staff only.

**Justin Berns**

Justin contributed to the DCCC for 2 events with the President. In both instances his checks bounced and then he would drop off the grid. **Do not solicit.**

**Steve Bing**

Steve informed DCCC staff in 2013 that he was now a Federal contractor and unable to contribute to the DCCC by law.

**Cynthia Birmingham**

Cynthia is a personal friend of Leader Pelosi and Mr. Pelosi as well as their daughter Christine Pelosi. She has contributed $20,000 or $25,000 to the DCCC in the past but should be treated as a Speaker’s Cabinet member.

**Edythe & Eli Broad**

The Broads are long time personal friends of the Leader and are some of the largest national Democratic donors. Although Eli and NP are close Eli has not maxed out to the DCCC in several years, instead sending in $5,000 or $10,000 contributions sporadically (he contributed through POTUS events in 2013). NP still values Eli highly and will go out of her way to attend events he invites her to and drop by his office. In the 2016 cycle my advice would be to try to set up a sit down meeting with Eli and NP so she can ask for a max out check face to face.

**Jim Brooks**

Jim is a long time friend and support of NP and maxes to the DCCC yearly. He often is unable to attend events due to his schedule but should be on the list for finance meetings on the Leader’s first trip to Los Angeles. Although he usually takes a long time to contribute he will always honor his commitment. Jim’s political director, Elaine Shamir, handles his contributions and all follow up/event invitations should all go through her.

**Susie & Mark Buell**

Susie has maxed out to the DCCC sporadically throughout the years mainly due to her other commitments as she is one of the more active fundraisers and donors nationally. She is very closely tied with Secretary Hillary Clinton and should be one of the Leader’s first calls for any events with HRC in the future. She raised over $170,000 for the DCCC from her network for the October 2014 Women’s event with HRC in San Francisco.

**Shawn & Brook Byers**

Brook is one of the early venture capitalist pioneers in Silicon Valley and has been a long time Speaker’s Cabinet donor to the DCCC. He is very close with Congresswoman Anna Eshoo and she should reach out to him for any Silicon Valley events.

**Marcy Carsey**

Mary is a longtime supporter and friend of Leader Pelosi and one of the largest national donors to Democrats. She is also close friends with Terri New and in many cases ignores all other invitations and asks except that come from Terri. Meeting requests, invitations or ask should go to her through Terri.

**Joe Cotchett**

Joe is one of the most successful trial attorneys in the country, and a very long time supporter of the DCCC and Leader Pelosi. In the past he used to write contributions personally and raise contributions from his firm but has stopped raising checks in recent years (Niall McCarthy at that firm should be asked to do so). In 2014, Joe was quoted in a New York Times article citing how donors should give to the DSCC instead of the DCCC due to the importance of the Senate. This did not go over well with NP and since she has been a bit hesitant to reach out to him.

**Ann & Gordon Getty**

Ann & Gordon are long time friends of Leader Pelosi & Paul Pelosi as well as large social scene names in San Francisco. Gordon’s father is the Getty Oil founder and the Getty family is known nationally for the philanthropy. Ann & Gordon have hosted an annual April dinner for NP and the DCCC for almost 10 years. This event is the largest raising event of the year nationally and attended by almost all max out level Bay Area donors. Ann & Gordon don’t personally contribute to the DCCC but pay for all the costs for the event which usually adds up to $20,000 each. They should be treated as Speaker’s Cabinet members and be invited to all events, in particular Napa Valley, New York City Issues Conference and any events with high level surrogates.

**Lynn Gorguze & Rep. Scott Peters**

Congressman Peter’s wife, Lynn, has in most years maxed out to the DCCC to attend a particular event. These contributions are “raised” by Congressman Peters and are a means to include him in events nationally. For events in San Diego and Los Angeles earlier in the cycle the West Director should approach Congressman’s Chief of Staff to discuss Lynn supporting the DCCC during the cycle.

**Amb. Kathryn & Craig Hall**

The Halls host the Friday night dinner of the annual DCCC Napa Valley Weekend in August. The Halls usually in-kind the cost of the wine for that evening and are extremely close with the Pelosis and many of our Bay Area based donors. The Halls also typically double max to the DCCC yearly. In some years they don’t quite hit that total as they are constantly traveling and hard to get a hold of. They like to split up their contributions over the course of the cycle, into $12,500 or $25,000 chucks at a time. All solicitations and invitations should be sent through their political and philanthropic advisor Whitney Jacobson. Whitney can be very hard to reach and totally unresponsive at times. She requires repeated follow up.

**Cindy & Alan Horn**

Cindy & Alan are extremely close friends of the Leader, large supporters of the DCCC and DSCC and frequent event hosts. The Horns typically double max to the DCCC every year in addition to supporting House candidates and raising contributions for the DCCC. Cindy has hosted several events at her home over the last 4 years, and usually requires a direct ask from Leader Pelosi to do so. Cindy often asks Alan to reach out to his contacts in the entertainment industry, and when he does so he often races several max out contributions from other studio heads, agents or actors. Terri New is the Horn family’s political director and filters information to her.

**Valeria & Agustin Huneeus**

Valeria & Agustin host the Saturday lunch during the annual August DCCC Napa Valley Weekend. They at times contribute personally to the DCCC but often do not. Leader Pelosi is very close with them and considers them Speaker’s Cabinet members and asks them to be invited to all events if they are in town. They are extremely nice people and very easy to deal with. They don’t often attend events but at times can be drawn in by high level surrogates. DCCC staff should not approach them directly with any money asks unless approved by Leader Pelosi.

**Joan & Irwin Jacobs**

Irwin was the Founder and longtime CEO of Qualcomm, a telecom based in San Diego and he and his wife Joan are fixtures in the community in San Diego/La Jolla. The Jacobs are the largest philanthropists in the area and across the country, on top of being one of the largest political donors. Joan & Irwin have also been close friends of Leader Pelosi for several decades. They were not engaged with the DCCC in the 2012 cycle due to their commitments to President Obama but surfaced again in 2014. Leader Pelosi also targeted them to host our event in San Diego with the President and they were exceptional hosts. They were focused on raising money not taking care of their friends, and made numerous calls, emails and follow up. Their family also contributed a total of a quarter million for the event, which is extremely uncommon for hosts. The best way to reach the Jacobs is through their home assistant, Kaye, who is extremely friendly, helpful and responsive. Any time the DCCC is interested in doing an event in San Diego the Jacobs should be the first host call. They are also close to all the local members, in particular are heavily invested in keeping Congressman Scott Peters in Congress.

**Suzanne Nora Johnson & David Johnson**

Suzanne & David were brought into the DCCC fold by Congressman Becerra and have since become annual donors. The best way to get their contribution is to set up a finance meeting with the Leader when she is in Los Angeles. Typically the Johnsons will double max following the meeting although they usually take some time to send in their contributions. They travel constantly so rarely are able to attend events so it is best to “give them something” for their contribution (ie a meeting, call, another event nationally). **Please note:** Suzanne is unable to pass White House vetting due to her connections and Board membership with AIG.

**Cookie & Magic Johnson**

Cookie & Magic hosted the HSVF Reception with President Obama in November 2013 following a call from Senator Michael Bennet. Leader Pelosi has tried reaching out to Magic in the past to get him to a DCCC event but his schedule is extremely busy. He is close with Congresswoman Maxine Waters and I would recommend early in the cycle asking NP to ask Congresswoman Waters to ask Magic to host an event for the DCCC in Los Angeles.

**Danielle & Bob Klein**

Danielle & Bob are long time friends of NP as well as large DCCC and House Majority PAC donors. They give to the DCCC every cycle, and typically double max but in the 2014 cycle were more focused on Senate support. They should be solicited early on in the year to contribute and then NP can call later in the year for another check. It is best to copy Bob’s assistant (that deals with political matters) Elizabeth Tafeen on all emails.

**Amb. Eleni & Markos Kounalkis**

Eleni is the daughter of Sofia & Angelo Tsakapoulos and was appointed by President Obama as ambassador to Hungary in 2007 and served until the end of 2012. She immediately came back onto the scene with the DCCC and over the course of the cycle contributed over $40,000 to the DCCC and maxed to Leader Pelosi’s committees. She is also very well connected in the donor community in the Bay Area and could raise contributions if motivated. In addition she helped get her father back into political giving this cycle. She is a huge fan of Leader Pelosi and is rumored to have bigger political ambitions so wants to stay in the loop with NP, donors and well as high level surrogates.

**Marcy & Jeffrey Krinsk**

Marcy & Jeffrey are former DCCC Speaker’s Cabinet members from San Diego that we have seen reduce their giving in recent years. Important to note that they agreed to max for the May 2014 POTUS event in San Diego however declined to do so and expressed frustration when Michelle & Bill Lerach where blocked from attending by the White House. Bill Lerach was convicted and went to jail for a kickback scheme in the 2000s but prior to that was a huge democratic supporter and large name in San Diego. Bill and Jeffrey are close friends and the Krinsks have been trying for several years to get Bills conviction pardoned. Leader Pelosi left a message for them apologizing but highlight that it is a White House policy and we have no ability to negotiate.

**Lyn & Norman Lear**

Lyn & Norman are two huge names in Democratic circles and have been close friends of the Leader for several decades. Norman has stepped back his political giving in the last few years due to frustration with what is going on in politics. Lyn however still likes to support the DCCC to support NP and has maxed the last few years. Terri can solicit a contribution through their political director Lara Bergthold. NP also likes to do sit down meetings with Lyn or Norman if their schedules overlap.

**Judy & George Marcus**

George is the founder of Marcus & Millichap Real Estate, and is one of the wealthiest Greek-Americans. He and Judy have been close friends of the Pelosi’s for several decades and he is one of the best supporters of the DCCC in the country. He and Judy have double maxed to the DCCC every cycle as well as on occasion raised money from his children. George has already inquired about the dates for the August 2015 Napa weekend so he can clear his schedule. They will most likely renew their Speaker’s Cabinet membership early on in 2015.

**Wendy & Barry Meyer**

Barry is a studio executive that recently stepped down from Chairman of Warner Brothers to run a consulting firm that is still very closely associated with Warner Bros productions and films. Wendy is an extremely active professor, physiatrist and advocate for a variety of social causes, primarily orphans. Wendy & Barry are close friends of Leader Pelosi and contribute to the DCCC every year. They are very passionate about environmental issues, choice and gun control and have expressed frustration over the DCCC supporting candidates that don’t line up on those issues. They still max to the DCCC but sometimes prefer supporting candidates directly. They host events every cycle for the DCCC and will probably do so again if asked by the Leader.

**Nicola Miner & Robert Mailer Anderson**

Nicola & Robert are annual Speaker’s Cabinet members that typically attend NP’s events in the Bay Area and double max to the DCCC each year. They are living for the next year in France so are unlikely to contribute in 2015.

**Vivian Soren-Myers & Steve Myers**

Steve is a large supporter of Leader Pelosi and has been very helpful to the DCCC in the past in the OC area. He has hosed OC events for the DCCC twice, raising over $100,000 each time. In the 2013 cycle, he offered to host another event along with Congressman Lowenthal and Congresswoman Loretta Sanchez. However he eventually informed DCCC staff that he was moving into Los Angeles and unable to host an event. He met with the Leader and contributed $20,000 to the DCCC. Next cycle the West Director can reach out to Steve in March and ask him to renew his Speaker’s Cabinet membership and attend Napa and he usually does so.

**Ann & Mike Parker**

Mike is a long time DCCC donor and friend of the Leader. He is very into the specific policy details and legislative information on all current debates in DC. He contributed $20,000 to the DCCC at the end of 2014 but was unable to make any events this year. Mike has requested a meeting with the Leader to discuss a letter he wrote her in 2012 that covers specific economic policy proposals he would like her to consider.

**Marsha Rosenbaum**

Marsha had been a consistent Speaker’s Cabinet member up until the 2014 cycle when she informed DCCC staff that she has been having money problems and was unable to contribute this cycle. She said that once her money issues have been resolved she would be back to contributing again.

**Cheryl & Haim Saban**

Cheryl & Haim are extremely close to NP and are some of the largest donors to the DCCC in the last decade. They typically max to the DCCC each year, but were unable o in 2014 as they were federal contractors. Haim’s central issue is Israel and has numerous contacts and connections in Israel. The Leader often likes to host events at this home during the cycle although he is often very hesitant to raise. Cheryl & Haim are also very close with the Clintons and should be the first call for any event with Hillary or Bill in Los Angeles. They would be very motivated to host an event and raise contributions.

**Herb Sandler**

Herb is one of the Leader’s closest friends and their families have known each other for decades. The Leader raises contributions from Herb personally and he typically maxes to the DCCC each year either through a call or a meeting. Everyone in the Sandler family should be considered an extension of Herb and taken care of as well as possible by DCCC staff. Herb no longer raises contributions from his children directly.

**Kat Taylor & Tom Steyer**

Kat & Tom are large DCCC donors and Tom was the largest donor regardless of party in the 2014 cycle. Tom is very close to the Leader and was a guest speaker during the Saturday Issues Conference of the Napa Valley Weekend. Tom also has the ability to raise large contributions from numerous individuals in his network that only contribute at his request. He is very focused on environment issues, specifically climate change. Tom declined to contribute to the DCCC and HMP in 2014 despite multiple requests from NP.

**Mary & Steven Swig**

Mary and Steve are very large DCCC supporters and are actually NP & Mr. P’s best friends. They double max to the DCCC every year as well as support DCCC priority candidates at the Leader’s request. They typically are sat at the Leader’s table for any events they attend, and the West Director should be extremely attentive to their needs and requests. Lisa Presta is close to Mary and Steve and communicates asks to them on behalf of NP. They are currently very focused on student loan issues and are spending most of their time in Boston completing a Masters program at Harvard.

**Sofia & Angelo Tsakopoulos**

Sofia & Angelo are long time friends of the Pelosi’s and at one time were some of the biggest democratic donors in the entire country. Angelo founded a very successful real estate and development company based in Sacramento. However after the bursting of the housing bubble had a drop in money flow and had to hold of political giving for some time. Following the loss in the Republican primary of his son in law, George Demos, Angelo re-engaged with the DCCC and he and Sofia contributed $50,000. He should be a call for the Getty dinner in 2015 and asked to double max to the DCCC and potentially raise from his children.

**Michelle & Paul Zygielbaum**

Michelle & Paul are former DCCC Speaker’s Cabinet donors. However, Paul had a reoccurrence of cancer in 2013 and is focusing on that at this time. He requested to still be kept in the loop for events and would be back to contributing when he is healthy and able. NP likes to be kept aware of his treatment and progress.

**Feedback:**

It was a fantastic challenge to be able to be the West Finance Director this cycle. The position is demanding but can really be what you make of it and is a great way to build relationships with consultants, some of the largest donors in the country and important Members of Congress.

I enjoyed the restructuring of the office to create the pod system. I felt that really improved the synergy of the unit as well as communication on relevant races and candidates. It was also an excellent way to meet new people at the office that in past cycles I would have never really interacted with.