Exit Memorandum

To: Hayley Dierker

Cc: Missy Kurek, Stella Ross, Dan Boysen

Fr: Grace Gaylord

Dt:

RE: 2013-2014 West Finance Assistant End of Cycle Memo

**OVERVIEW**

The Finance Department at the DCCC is one of the larger departments in the organization. The 2013-2014 West team consisted of a Director, a Deputy Director and a Finance Assistant, as well as two off-site consultants based in California (San Francisco and Los Angeles). The West team is tasked with raising high-dollar contributions from the western region states, which for this cycle included: California, Colorado, Arizona, New Mexico, Oregon, Utah, Nevada, Idaho, Wyoming and Montana.

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. The responsibilities are primarly linked to 1) daily administrative and organizational support (e.g. processing contributions, database management and donor maintence) and 2) development and execution of all fundraising events in the West region.

**The West region raises money for a few different recipients:**

1. DCCC
2. DCCC Recount Fund
3. Nancy Pelosi for Congress (NP4C)
4. PAC to the Future (PTF) – Leader Pelosi’s PAC
5. Nancy Pelosi Victory Fund (NPVF) – which includes DCCC, NP4C and PTF – this is usually just raised for Leader Pelosi’s annual event in April at the home of Ann & Gordon Getty in San Francisco

Something to note about the Finance Department is that we function as one big team. You will notice that during certain times of the month, different regions are busier than others. If team South (or team Midwest, Northeast, Mid-Atlantic, etc.) has a Texas swing coming up in a week or an even with POTUS, and team West is simply prepping for events that are 6 weeks away, you will be expected to help team South with whatever they may need. When team West has back-to-back POTUS events (which has happened) and/or several events happening in close succession, you CAN and SHOULD ask for help from regions that are not busy with time sensitive responsibilities. Do this so that you meet deadlines ahead of schedule. Additionally, if you need assistance with procedures of any kind, don’t hesitate to ask for help from any finance staff member (especially those who were around the previous cycle). They will all be more than happy to help you!

**Important roles to note at the DCCC (other than the West team):**

* Finance Operations Director (currently Amy Soenksen): This is the liaison between the Finance Department and other departments within the DCCC, as well as Leader Pelosi’s official office.
* Deputy Executive Director of Finance (currently Missy Kurek): The most senior position in Finance, Missy is also Leader Pelosi’s Political Director. Missy has final sign-off on everything.
* National Finance Director (currently Stella Ross): Stella shares the responsibility of staffing Leader Pelosi at Finance events with Missy and also shares responsibility of signing off on materials.
* Lisa Presta: NorCal consultant. We consider “NorCal” any zipcode above 93500. Lisa works by herself and has been working with Leader Pelosi for a very long time.
  + Lisa email: lisapresta@yahoo.com
  + Lisa cell phone: (415) 515-5452
* Terri New: SoCal consultant. We consider “SoCal” any zipcode below 93500. Terri has also worked with Leader Pelosi for a long time. She has a small team of her own at Capital Strategies. Her assistant, Elizabeth Tauro, is the only other team member you might be in contact with.
  + Terri email: Tnew@aol.com
  + Terri cell phone: (310) 345-2668
  + Elizabeth email: elizabethrtauro@gmail.com
  + Elizabeth cell phone: (310) 795-3977
* DCCC Staff Writer (currently Katie Mulhall): Katie is the DCCC staff writer in the communications department, which means that she writes all of the Leader’s talking points, renewals letters, thank you letters, etc.
* Finance Events Director (currently Krista Jenusaitis): It is our responsibility as the regional team in Finance to fill the room and raise the money; it is Krista’s responsibility to actually execute the logisitics of the event. She orders the flowers, catering, coordinates with the Secret Service (if a White House event), etc.

It is also important to note that the majority of the West team’s time and focus is spent in California, which is where most of the West’s contributions come from and is also Leader Pelosi’s home state. It is very satisfying to have a constant large flow of contributions from California (particularly at the Speaker’s Cabinet level), but since many of the donors in California are long-time friends of Leader Pelosi and because of Leader Pelosi’s own heavy focus in the state, this raises the bar significantly for the West team to be on point at every level of fundraising for the region. (It is important to note that the majority of these kinds of donors are found in California, but there are a smattering of this type in other West states, such as Cantey & Charles Ergen in CO).

A couple of examples of this high bar can be found with orchids and thank you notes. In terms of donor maintenance, Leader Pelosi’s signature gift to donors is a white orchid – these are sent for happy occasions (birthday, award, birth, thank you) and sad occasions (death, illness) – and unlike the other regions in Finance, all orchid language (the notes included with the orchid) must be approved by the Finance department’s senior staff (currently Missy Kureka and Stella Ross) and the appropriate consultant (if the donor is in California) before they can be sent. It is crucial that everything in the note is correct (i.e. spelling of the name) and that the West Finance Assistant is proactive about sending birthday orchids (long-time donors have come to expect Leader Pelosi’s white birthday orchid). Another example are thank you notes – a thank you note is sent to every donor after they make a contribution to the DCCC. It is important to keep up with sending these thank you notes – Leader Pelosi sees the West region donors somewhat regularly and it is very embarrassing if the donor mentions to the Leader they did not receive a thank you yet from the DCCC for his or her contribution. For this reason, thank you notes should be sent every 1-2 weeks depending on the flow of contributions at the time. There are more detailed descriptions of these procedures later in the memo.

**ADDITIONAL MEMO COMPONENTS**

1. **Money Processing**
2. **Donor Maintenance**
3. **Thank You Notes & Renewals**
4. **Visa Process**
5. **Scheduling Requests & Long Term Updates**
6. **Call Sheets**
7. **Prospecting**
8. **Event Materials & Briefings**

**Money Processing:**

Tracking the money that comes in each day is one of the most important parts of the Finance Assistant job. All money that comes in is tracked on our Money In spreadsheet, which is saved here: **S:\West 2013-2014\Money Spreadsheets.**

ALL checks, credit card and online contributions that are received VIA fax, mail, UPS, FedEx etc. will be scanned and emailed to you from the Finance Operations Director as PDFs. All PDFs of money will have the same title path: “LAST Name, First Name, Date, Region” [Example: “Ordway, Edwin 12-19-13 WEST”]

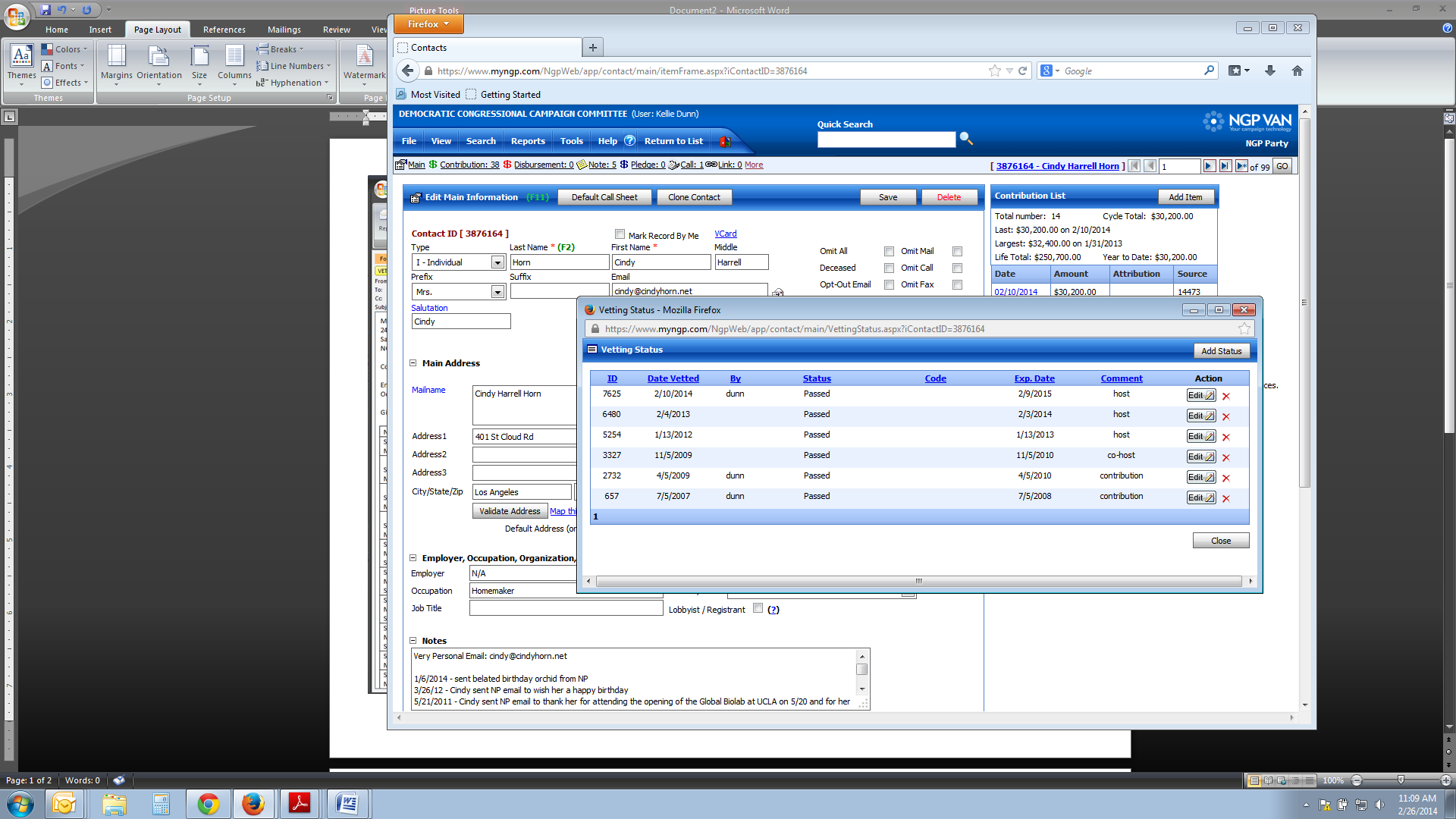
You will be sent a High Importance email with the subject line “New Money” as online contributions come in, and after UPS/FedEx and daily mail has been received. In the body of the email, you will receive a listing of the money received (name and amount), as well as any notes if it is a problem check.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

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

1. Save a copy of the contribution PDF in the Money in folder. It is broken down by quarter and month received. So if you receive a contribution in November 2014, you would save it in S:\West 2013-2014\Check Copies\DCCC\2014\11 November
2. Log the money into the “Money In” spreadsheet. The 2013-14 money in spreadsheet is saved here: S:\West 2013-2014\Money Spreadsheets
   1. **Money In:** any NEW money that came in that day and is not a problem check
   2. **Hard Commits (HC):** any NEW hard commits you have for that day. Hard commits are specific monetary commitments received that have not yet come in the door. For example, if Megan is at an event and says I have X, Y, and Z checks in hand, that is a hard commit. John Doe telling you that he will “drop a check in the mail sometime this week” is NOT a hard commit. John Doe giving you the tracking number for an overnight package with a check in it could be considered a hard commit – once you verify that the tracking number is legitimate.
   3. **Problem Checks (PC):** any NEW problem checks you have for that day. Problem checks are checks that have some sort of processing issue. This issue may be signature verification, verifying addresses, personal funds verification, or any other issue. Kellie will notify you when a check becomes a problem check, and help you through the process of resolving it.
3. Send an update to the monthly money in email chain
   1. Reply ALL to the money chain
   2. Include: 1) name of donor; 2) amount; and 3) whether it is IN, HC or PC resolved
   3. Note: If you receive a contribution that was already on the chain as HC, you do not need to update the chain.
4. Log the money in NGP by making a transmittal
   1. Search for the donor’s record in NGP. If they are not already in NGP, you will need to create a new contact record.
   2. Once you’ve found or entered their record, make sure that all information (address, phone, employer/occupation) matches information on their check and on their contribution information.
   3. Enter a new contribution.
   4. You should enter the:
      1. Date Received
      2. Amount
      3. Source (each event has its own source code, which you have to ask the Finance Operations Director to create)
      4. Method (check, credit card, wire, etc.)
      5. Check number (if applicable)
      6. Tally Members (this is who gets credit for the contribution—always Finance West and Nancy Pelosi, and other members(s) if applicable)
   5. Make ONE copy of the transmittal and give it to the Finance Operations Director
   6. When you print out your transmittals you must include the following
      1. Your initials in the “Processed By” Section
      2. Check off that the addresses and the employer/occupations on the transmittal match what is on the check or credit card receipt
      3. In the Note Section- please include the Vetting Status
         1. If the donor’s vetting is already passed, just write “Vet Passed”
         2. If you just sent a vetting email for the donor, please write “Vet Sent: Date”

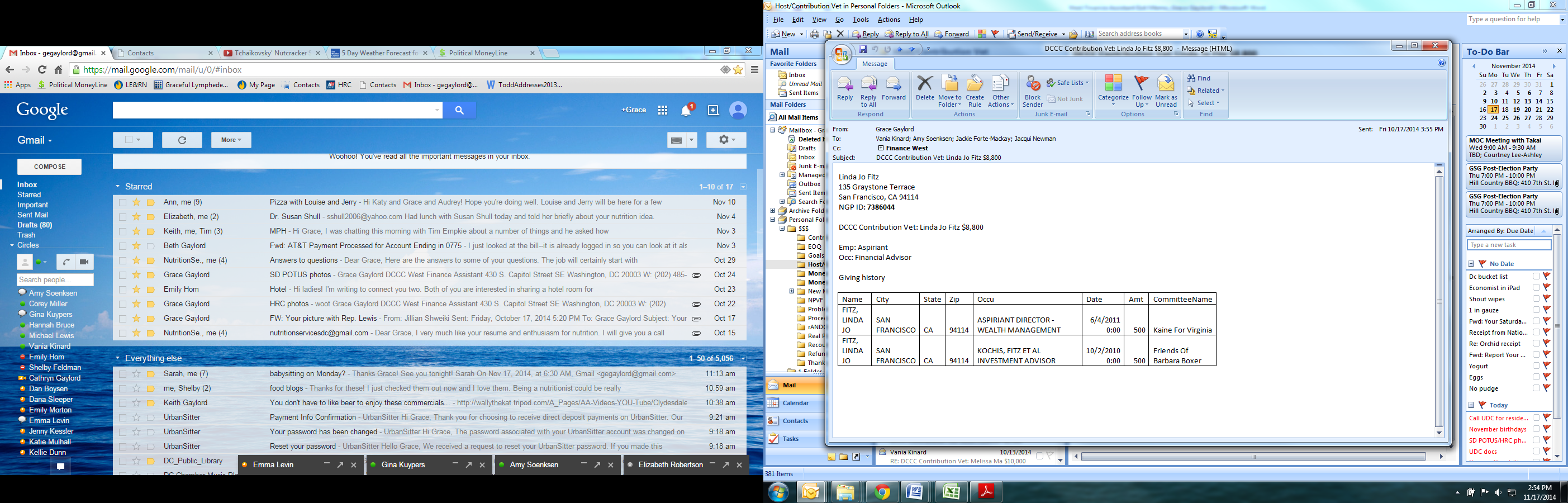
**Contribution Vetting:**

* Any individual who contributes $5K or more in a calendar year MUST be vetted
  + Feel free to send contribution vetting emails for your hard commits before the $ walks in the door
  + Note- Accounting CANNOT PROCESS A CONTRIBUTION until it has passed vetting
* Any individual who hosts an event (whether at their home or part of a host committee) MUST be vetted
* Host Vetting trumps Contribution Vetting-
  + If an individual was vetted to host an event, then later contributes $5K, they won’t need to be vetted again
  + This sadly does not work the other way around- they need to go through host vetting to host even if they’ve already passed contribution vetting
* Vetting lasts a full year from the date vetting passed, so if they contributed $10K in September of 2013 and were vetted at that time, when they contribute $5K in January of 2014, they don’t need to be Vetted again
* A donors vetting status can be found on their NGP page, right below the email box.
  + Vetting status will list either “passed,” “expired,” “not vetted,” and “failed” (I’ve attached a PDF of all of these highlighting where on the page it can be found)
  + You can click on the “update” box next to the Vetting Status to see what type of vetting the donor has:



Vetting emails:

* Need to be sent to the following people: Jackie Forte-Macay, Jacqui Newman, Amy Soenksen and Vania Kinard. Your regional team should be cc’d
* Subject line of the email “Contribution Vet: Donor Name and Amount IN or HC” OR “Host Vet: Donor Name and Event ”
* In the body of the email please include the following:
  + Donor Name, Address and NGP ID
  + Contribution Amount- whether it is IN or a Hard Commit
  + Employer/Occupation
  + Giving History dating back two election cycles (that is currently back to 2009)

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**Problem Checks:**

On occasion, new contributions will be classified as “problem checks”. This means that for some reason we cannot deposit the check immediately (or if it is a credit card contribution, it is technically unlawful to have the contribution in our bank account). If this happens, we need to send a form for the donor to sign. Different problems have different forms. Examples of the different types of problems are below:

1. Signature Form – The signature on the check is illegible or it is signed by someone else.
2. Entity – When the check is from a firm (ie Smith and Smith LLC). This form ensures that the contribution is from a partnership and is not an illegal corporate contribution.
3. Trust – when the check is from a trust fund (Smith Family Trust). We only need a form when the account name and signer are not the same. A check from the Tom Smith Trust signed by Tom Smith is OK.
4. Earmarked – When a donor writes something in the memo line. Often times they will put Leader Pelosi or the member that hosted the event. These checks can’t be cashed into the general DCCC fund. The donor needs to sign a form saying that they intended the funds for the DCCC rather than a specific candidate

\*All of the forms and the explanations for each form are found at: S:\Finance 2013-2014\Problem Checks\2013-2014 Problem Checks

\*Note: It is not your responsibility to flag a contribution as a problem check – this is done by the Finance Operations Director and noted in the New Money email that is sent.

*The resolution process for problem checks is as follows:*

1. Identify the correct form to be completed.
2. Save over the template to make a customized verson of the document to be saved here: S:\West 2013-2014\Problem Checks – this is where you plug in their name, address, check amount, date, etc.
3. Send the PC form either directly to the donor or to their assistant. If you do not know for sure the best way to contact the donor, call the donor (or their assistant) and ask for the best email to send the form to.
4. We do not need the original returned – it can either be returned via fax (202-478-9499) or scanned via email.
5. Resolving PCs can take some serious persistence – depending on the donor (and how close it is to the end of the month/quarter), it is important to follow up in the form of email and/or phone every couple of days.

**Sending Money In:**

Every evening, the Finance Operations Director will ask that you send “money in and commits”. This means she wants you to send in any NEW money that you received that day. Your Money In goes into the daily *SNAP*: This is a daily ‘snapshoot’ of fundraising intake. It is critical that your Money In is accurate because DCCC leadership uses the ‘SNAP’ to gauge where we stand financially. The Money-In spreadsheet is saved here: S:\West 2013-2014\Check Copies\DCCC\2014\11 November.

When you send money in, you send to:

1. Finance Operations Director
2. National Finance Director
3. Finance West

You copy and paste the following sections from your money in spreadsheet:

1. Money In
2. Hard Commits
3. Problem Checks
4. NPVF Money In/Commits (if applicable)
5. Recount Money In (if applicable)

**Donor Maintenance**

For a variety of events, occasions and as “thank you” gifts, you will send orchids from Leader Pelosi. As mentioned above, the orchid process for the West region is slightly different than for the other regions.

*First, all of the orchid language must be approved before an orchid can be ordered.*

* Approval is done by the senior leadership in Finance (currently the Deputy Executive Director of Finance-Missy and the National Finance Director-Stella).
* In addition, if the orchid is sent to California, the appropriate consultant must be included on the email (NorCal-Lisa Presta; SoCal-Terri New) – it is important that they be kept in the loop, but the ultimate approval is needed from either Missy or Stella.
* The orchid tracker, with all of the language that has been used to send orchids (to provide you with inspiration and an idea of Leader Pelosi’s voice), can be found here: **:\West 2013-2014\Donor Maintenance**

*Second, for California we have a florist that we call for NorCal and as a SoCal florist. For all other states, we use TeleFlora (like the other regions do).*

* SoCal: Fred at Tree Frogs – (310) 858-929 – this is Fred’s cell phone. He will pick up anytime after 9am PST. You can also email him the order at [FWGibbons@aol.com](mailto:FWGibbons@aol.com). He answers this even earlier in the day. Fred is very accommodating, especially when it comes to last-minute (same-day) orchids. He appears to be the florist for the stars, so he has been to pretty much everyone’s house and knows addresses for celebrities that not even we have.
* NorCal: Deidre at Rosebowl Florits – (415) 474-1114 – this is the work number for Deidre. She is usually at the flower market at 9am PST, and her shop doesn’t technically open until 10am PST. Deidre does MUCH better with as much heads up as you can do, especially if it’s an order in San Francisco. Sometimes it can take awhile to get orchid language approved, so I’ve started emailing Deidre ahead of time giving her a heads up that I will be making an order. Her email is [deidra@rosebowlflorist.com](mailto:deidra@rosebowlflorist.com). NOTE: she does not check this email all that often.
* Teleflora: The standard order is a white “Opulent Orchid” from Teleflora. Use the Finance Director’s DCCC Visa Credit Card to process the payment. Create a new log-in with your email address and saved the credit card information. Once you have created an account, you will be able to access receipts and other information from previous orders.
* For every order you need:
  + Address of delivery – home or work
  + Contact number of recipient
  + Date of delivery
  + Message
  + And you request a WHITE orchid – Fred and Diedre know the deal; the Opulent Orchid from Teleflora is supposed to be white, but I find it useful to also make a note in the order that the orchid must be white.
  + AND, make sure you save a receipt for all of these orders. Fred and Diedre will email scanned copies of the receipts to you.

*Donor maintenance spreadsheet:*

Starting this cycle, a donor maintenance spreadsheet was started to keep better track of all of the orchids that are sent (currently this is the only place this is tracked; nothing is tracked in NGP) and also to keep better track of birthdays (so that we can be proactive instead of reactive when it comes to birthdays).

* The Orchid and Birthday Tracker is found here: **S:\West 2013-2014\Donor Maintenance**

*Keeping track of birthdays:*

* Some of the SoCal donors are famous enough that their birthdays can be found on Google (i.e. they have their own Wikipedia page).
* For everyone else, the best way to gather birthdays is through the vetting information that we get for events with the White House (vetting to attend a White House event requires at minimum birthday and social security number).
* NOTE: The birthdays on this version of the tracker are not 100% comprehensive. The birthdays on this version were last updated mid-2014 and it is important to periodically update with new birthdays.
* NOTE: Also important to note that there are more birthdays on this tracker than we would want to send orchids to. There is a column notating which people we sent orchids to in 2014. It is up to the discretion of the West Finance Director to decide who we want to send orchids to. Generally, though, it is to Speaker’s Cabinet members, the occasional longtime donor that is not a SPCB member and the occasional famous prospect that we are trying to get.

*Examples of orchid language:*

1. Thanking for hosting an event *–* ***Thank you for hosting us in your beautiful home. It was such a lovely event and a pleasure to see you. Your longtime support and friendship mean the world to me. Best, Nancy Pelosi***

2. Wishing well after surgery/illness – ***I wish you all the best for a speedy recovery. Look forward to seeing you and Josephine in a couple of weeks. Best, Nancy Pelosi***

3. Condolences after death – ***My most sincere sympathies and condolences for your loss. Keeping you and all your family in our prayers. Best, Nancy Pelosi***

4. Birthday - ***Happy birthday. Sending you best wishes. Hope to see you and Bill soon. Best, Nancy Pelosi***

5. Birth - ***Congratulations on the newest addition to the family. Bennett must be thrilled to be a big brother. Happy to hear Carson was born healthy and happy. Best, Nancy Pelosi***

***FEEDBACK: Be on top of this! It is your responsibility to make sure we are sending orchids for birthdays and events; the other types of situations will be flagged by someone else. Always been one step ahead to make sure you can get the language approved in time to order.***

**Thank You Notes & Renewals**

**Thank You Notes:**

Each region is responsible for sending thank-you notes for contributions they have received. Make sure to send thank you notes in a timely manner. A good rule of thumb is to try to complete all thank you notes approximately every two weeks.

The actual thank you note language is updated every quarter by the DCCC speechwriter. This cycle there was no clear delegation about who requests from the speechwriter that a new letter be written – usually it was one of the Finance Assistants. The note is drafted by the speechwriter and approved by the Finance leadership.

*Thank you note process:*

1. Thank yous are saved here: **S:\West 2013-2014\Thank Yous**
2. Pull the updated list from NGP. Search for all contributions that are tallied to the West region within the specified date range. You will be able to tell when the last batch of thank you notes were sent based on the latest date on the list of recipients. For example, the last batch was sent for contributions made through October 30, 2014 and the list is saved as “ 10.23.14-10.30.14 TYs”.
   1. NOTE: It is important to cross reference the list you pull from NGP with the thank you note column on the money in spreadsheet. This is for a couple reasons. 1) Sometimes there is a lag when accounting processes the money, so the record may not pull. 2) NPVF contributions are not going to pull. 3) Sometimes ActBlue contributions that are supposed to be credited to the West region do not always get properly marked in NGP.
3. After pulling the list, make sure the materials are available. The envelopes and letterhead are stored in the front cabinets. Use “Nancy Pelosi, Democratic Leader”, paid for by the DCCC letterhead and envelopes with the DCCC return address.
4. Make sure you have the most updated thank you note template. After each quarter, the communications department approves new versions of thank you notes. It is very important to have the correct language.
5. Mail merge the exported list onto the letters and make sure that they are properly formatted for the letters.
6. Mail merge the address info onto labels for the envelopes. Again, Microsoft Office has a step-by-step mail merge wizard that guides you through the process.
7. Stuff the letters into the envelopes. Leave the envelopes unsealed and “nested” in one another. Then, head over to the mailer machine and feed through the postage machine.
   * Choose our department, Finance 606 (which will track the postage amount)
   * Choose “sealer on”
   * Remember that the mail is picked up at 3:00PM everyday (the front desk receptionist takes the mail down at 2:30PM). If you are sealing and postmarking your letters after 3:00PM, choose tomorrow’s date so that you don’t risk having the postal worker not pick your mail up.

NOTE: Leader Pelosi always wants the woman’s name first. Ex. – Mary and James Smith. This applies to any letter/ renewal/ note on an orchid that is being sent from NP.

**Renewals:**

Each quarter we do a renewal mailing. Renewals are sent by region to donors who meet certain criteria (including date and amount of contributions).

Renewals are saved here: **S:\West 2013-2014\Renewals**

The renewal list is going to change every quarter, based on who the West Finance Director wants to target. These letters include a specific ask and the easiest way to do this is just to create a new column in excel so you can just merge it into the letter.

The process of creating the letters is the same as creating the thank you notes. And like thank you notes, the communications department creates a new renewal letter each quarter.

***FEEDBACK: As mentioned above, it wasn’t clear whose responsibility it is to reques that the thank you note and renewal letter be updated each quarter. It may make most sense to have the Finance Operations Director or the National Finance Assistant request them.***

**Visa Process**

The West Finance Director has a DCCC authorized VISA Credit Card. This card is used for travel, donor meetings, orchids, and any number of other work related expenses. You will have her number on file, and will regularly book her travel, buy and send orchids, etc.

Each month, the accounting department will bring you a physical spreadsheet as well as an electronic copy of the credit card purchases for the previous month. It is your responsibility to fill out the excel spreadsheet with the allotted fields (source, description, account, amount, address, etc), and compile hard copies of each receipt to give to the accounting department. Accounting keeps track of what each department spends per month, and they also subtract event expenses from the overall fundraising event total to ensure that we are within our budget. For reference, you can look in the below folder to view previous month’s completed CC statements.

***S:\West 2013-2014\Visa***

It is very important that you keep all of your receipts!!

If you do lose a receipt, you will need to a missing receipts memo. Examples missing receipts memos are found here: S:\West 2013-2014\Visa

***FEEDBACK: My best piece of advice for the Visa is 1) make sure to keep receipts along the way and 2) go through the Visa as soon as you get it to make sure you have all the receipts. Sometimes it can take time to get a missing receipt from a hotel or one of the orchid vendors.***

**Scheduling Requests & Long Term Updates**

**Scheduling Requests:**

For new events that Missy has signed off on, you have to complete a scheduling request which is sent up to the Leader’s official office. This has the event details which include date, time, location (if applicable), hosts (if applicable), purpose, size, etc. Scheduling requests are saved here: **S:\West 2013-2014\Scheduling Requests**

**Long Term Updates** **“LT Update”:**

The Finance Operations Director keeps track of the Leader Pelosi’s Long Term Schedule. This document should never leave her area, as it is a security risk for Leader Pelosi should that information be released. It is important to check the Long Term calendar regularly for accuracy and to make sure that all event details are accurately reflected.

Process:

* Email Amy and cc Missy and Stella, and your entire team
* Subject: **Long Term Update** 
  + This is important. It should say nothing more and nothing less than this.
  + Body: Relevant info only. They need to be able to read this quickly and pick out only what needs to send up. The changes need to be made clear- highlight them or put them in red, it’s important to clearly indicate what exactly the update is.
  + Your job is to fill in the holes as you have the information!
* Every event needs the following details:
  + Location (Name of location, Room, Floor, Suite #, exact address and zip code)
  + Details:
  + -Attendees (Total # and VIPS (Members, candidates etc) confirmed to attend)
  + -Reservation information (# and name it is under)
  + -Event run time (for events, not meetings)
  + Timeline that is exactly what you put in your briefing)
  + Staff (Missy, Stella, etc, with cell phone number)
  + Site Contact - this is the SITE contact- someone at the office, hotel, event space that can give details to NPs security team. This is the person the security detail will call to do the walk-thru of the event. This is important.
  + Contact- For finance meetings only, a contact number for the person NP is meeting with

**Shell of Event:**

TIME: TITLE

Location:

Details: (Tic Toc)

- Event Run Time =

- Attendees = TBD/Reps. X, Y, and Z

Staff:

Site Contact:

Contact: (if a finance meeting)

This is how it will look completed on the Long Term:

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

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

95818

Details:

Event run time: 5:30p – 7:30p

- 5:30p = Event begins

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

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

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

- 7:30p = Event concludes

- This event will be outside on grass

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

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

Site contact: Tina Smith, (999) 999-9999 w

***FEEDBACK: For Team West this cycle, it wasn’t always clear whose responsibility it was to send Long Term updates. In short, we all would send them. The lack of coordination was mostly present when either two of us sent the exact one at the same time or we forgot to send an update for something. I would recommend making it more clear where the responsibility lies for the next cycle. For example, maybe it should always be the assistant’s responsibility.***

**Call Sheets**

Call sheets provide a clear and accurate summary of donor information and giving history. The West team makes call sheets either for Leader Pelosi or for the MOC who is hosting the event. Call sheets need to be as accurate and as thorough as possible. The West saves call sheets in the corresponding event folder; an example is: **S:\West 2013-2014\Q3 2014\140723 SV POTUS\NP Calls**

Call sheets always need to include the following:

1. **Contact Information**: make sure you have accurate contact information for each call sheet. You will need to verify this by calling each number before it is sent for approval to Missy. Leader Pelosi will be very unhappy (understatement) if she dials a wrong number.
   1. ***NOTE: It is the Finance Assistant’s role to check ALL numbers for call sheets before Leader Pelosi makes these calls. It is absolutely crucial that the numbers on these call sheets are correct.***
2. **Ask**: This will have the main ‘ask’ for the call. The call might be for a renewal, an end of quarter ask, or an event invite. Chris (Regional Director) will let you know what this should be.
3. **Background/Notes**: This provides context on the relationship between the person and the DCCC and/or member making the call. Here you will add information regarding how long they have been engaged with the DCCC, which events they have attended, and if/when NP or the MOC has met them before. This helps the MOC remember the person they are calling. You will also add in all DCCC giving history in this section, and note whether the person attended a specific event and what amount they contributed on what date.
4. **Biography**: This is the bio of the person you are calling. Most of the time, this information can be found on the person’s work website. Make sure the information is accurate and to-the-point. Make sure you don’t just copy and paste from a website or Wikipedia. You should edit the information to make sure it’s relevant and that it makes sense.
5. **Giving History**: Other than confirmed contact information, this is the most important aspect of the call sheet. This information needs to be very accurate and up to date in order for the Member of Congress to have an appropriate ask. You can look up and export the person’s giving history via CQMoneyline. Once you have imported the giving history, calculate how much that individual has federally remaining to give to Federal Committees. Additionally, you will need to list giving history for an individual from the last three election cycles (2011-2012, 2009-2010, 2007-2008).

NOTE: You will need to list giving history by year, largest to smallest. DCCC contributions are in **bold** and with the contribution source in parenthesis.

An example of a call sheet is below:

**Leader Nancy Pelosi**

**DEMOCRATIC CONGRESSIONAL CAMPAIGN COMMITTEE**

*Staff: Lisa Presta (415) 515-5452*

*11/21/2014 10:14 AM*

*Name:* Marc Benioff *Work Phone: (415) 901-8423 asst. Joe Poch*

*Spouse:* Lynne

*Employer:* SalesForce

*Occupation:* Chairman/CEO

*Assistant:*  Joe Poch

*Address:* One Market St

Landmark Ste. 300

San Francisco, CA 94105

**Ask: Please ask Lynne & Marc to contribute $64,800 to the DCCC for the Monday, October 20th DCCC VIP Receptions and Lunch with special guest Hillary Rodham Clinton in San Francisco.**

**\*Please Note: Marc agreed to host a Nancy Pelosi for Congress event along with other executives from Salesforce on October 27th in San Francisco.**

**Event Details:**

**DCCC Lunch with special guest Hillary Rodham Clinton**

**Monday, October 20th, 2014**

**Fairmont Hotel**

**950 Mason Street**

**San Francisco, CA**

**Guest Call Time: 11:00am**

**Chair - $32,400 per couple**

*(2 tickets to VIP Reception, Photo and 1 table of 10 to luncheon)*

**Co-Chair - $10,000 write/raise per person**

*(1 ticket to photoline and 1 table to 10 to luncheon)*

**Ticket - $1,000 per person**

*(1 ticket to Luncheon)*

**Notes:**

**September 2013:** An orchid was sent to Marc on your behalf to wish him a happy 50th birthday on September 25th.

**July 2014:** You left message for Marc inviting Marc to be a special guest speaker for the August 2014 Napa Valley Weekend. Marc was in Hawaii and unable to attend the weekend.

**April 2014:** You left a message for Lynne & Marc on April 12th inviting them to attend the Nancy Pelosi Victory Fund dinner at the home of Ann & Gordon Getty, but they were unable to attend that event.

**January 2013:** Lynne & Marc contributed $50,000 to the Nancy Pelosi Victory Fund and Lynne attended April 3rd Dinner at the home of Ann & Gordon Getty with special guest President Obama with their 2 daughters.

**January 2013:** You attended Marc’s Tech event during the Presidential Inaugural Weekend in Washington, DC.

**June 2012:** You left a message for Marc with his assistant, Joe, on Friday June 1st inviting him to the Nancy Pelosi 25th Anniversary Celebration and Concert on June 25th in honor of your 25 years of leadership in the House of Representatives.

**April 2012:** You left a message for Marc with his assistant Joe on April 10th. Lisa Presta has followed up via email and phone.

**April 2011:** Marc & Lynne hosted a fundraiser for President Obama in their home in San Francisco.

**Giving History:**

**Marc:**

**2014:** DNC $32,400

**2013: DCCC $15,000 (4/11 Getty)**

**Pelosi $5,000**

**PAC to the Future $5,000**

Americans for Responsible Solutions $500,000

Ready for Hillary $25,000

DSCC $32,400

NRCC $25,900

Booker $10,400

Ro $2,600

McCarthy $1,000

DNC $16,200

**2012:** Obama VF $30,000

**2011:** Obama Victory fund 2012 $35,800

Khanna $2,500

Lingle $5,000

**2010:** DNC $30,400

Fiorina, Carly $2,400

**2009:** DNC $30,400

**2008:** McCain Victory Fund $28,600

POTUS $28,500

Coleman $2,300

McCain $2,300

**2007:** McCain $4,600

Obama $2,300

Allen, Tom $2,300

Romney $2,300

**2006:** Akaka, Daniel $2,100

Thielen $2,100

Akaka $2,100

Forward Together PAC (Sen. Mark R. Warner, D-VA) $5,000

**Lynne:**

**2014: No Giving History**

**2013: DCCC $15,000 (4/11 Getty)**

**Pelosi $5,000**

**PAC to the Future $5,000**

DSCC $32,400

Ready for Hillary $25,000

Booker $10,400

Ro $2,500

**2012:** Obama VF $40,000

**2011:** Obama Victory Fund $35,800

**2010:** DNC $30,400

**2009:** No Giving History

**2008:** No Giving History

**2007:** Obama $4,600

**2006:** No Giving History

***FEEDBACK: Keeping track of which call sheets/numbers have been checked can sometimes be confusing. At the very end of the cycle, we started marking the file name with a @ when the numbers were checked. An example of this is found here: S:\West 2013-2014\Q4 2014\141020 HRC SF Women\NP Calls\Tier 1. This is not necessarily the best way to do this, but is an option.***

**Prospecting**

Prospecting is an on-going project to identify new donors and those who have capacity been contributing to the DCCC significantly below their giving capacity.

Prospecting is based on researching individuals who have a high likelihood of contributing significantly to the DCCC based on demographic and giving history and strategizing the best way to reach out.

[Political MoneyLine](http://cqmoneyline.com/tr/tr_MG_IndivDonor.aspx?&sMP=1&sText=LastName,%20FirstName&sCycle=2012) is an online database of political contributions based on FEC filings and publically available information and great resource for prospecting. It has search functions for individuals, campaigns, parties, PACs, committees, zip code and other variables. It is a great tool to pull lists of donors to a MOC campaign to get ideas for call sheets, to see who was contributing to certain races and looking at a donor’s previous giving as a way to gauge their capacity.

A good page to use is the Find Donors page on Political Moneyline: <http://www.politicalmoneyline.com/tr/tr_MG_IndivDonor.aspx?&tm=3>

Good recipients to search:

* Democratic National Committee (DNC)
* Democratic Senatorial Campaign Committee (DSCC)
* House Majority PAC (HMP)
* Senate Majority PAC (SMP)
* Emily’s List
* Priorities USA
* League of Conservation Voters
* Americans for Responsible Solutions
* American Bridge 21st Century
* Ready for Hillary
* Obama for America

***FEEDBACK: The West team does not have a particularly organized way of prospecting. Some prospects lists can be found here: S:\West 2013-2014\Prospects. Others are saved in respective event folders. Prospect lists are usually created on an ad hoc basis for some events, but not others. This is probably partly because there are already a well-established base of West donors. Other regions, such as the South, have a very intense all-inclusive prospect spreadsheet that gets updated regularly. This may be a beneficial direction for the next cycle.***

**Event Materials & Briefings**

Every event starts out differently. Some events are hosted annually and others are events that are completely new. You will work with the West Director to ensure the hosts are happy, that they understand their raising obligations, and have realistic expectations about what an event with Leader Pelosi entails.

While the regional director will work on bigger-picture aspects and host/member coordination, it is your responsibility to take care of the following items:

1. Fill out a scheduling request

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

1. Create a source code

Each event gets a source code. This source code is used to track the money raised for that event and any expenses related to that event. All source codes are 5 digits – for example 14838. The first two digits are for the year, the last three are the event. For recurring events, use the same last three digits and just update the year. For the source code 14838 – this is the code for the recurring women’s event in San Francisco.

1. Host Vetting

If the event is hosted at someone’s home you will need to send a host vet. This is the same as the contribution vet shown above.

1. Website request

Amy will send to the digital team who will create an RSVP page for attendees to contribute online. The request needs to include the following:

URL: [www.dccc.org/LAwomen14](http://www.dccc.org/LAwomen14)

Header: October 6th DCCC Ultimate Women’s Cocktail Reception with Leader Nancy Pelosi

Description Text: Please join House Democratic Leader Nancy Pelosi, members of the California Democratic Delegation and Candidates, and Ann & Jim Gianopulos for a special **cocktail reception** on Monday, October 6th at the Gianopulos home in Los Angeles.

Monday, October 6th, 2014

6:30PM Co-Chair & Co-Host Reception

7:00PM Cocktails

Location:

The Home of Ann & Jim Gianopulos

Address provided upon RSVP

Contribution Levels:

Co-Chair: $32,400 per couple **Pre-Reception and cocktails**

Co-Host: $10,000 per couple **Pre-Reception and cocktails**

Sponsor: $5,000 per couple

Ticket: $2,500 per person

Needed By: ASAP

Contact Info: For questions or additional information, please contact Terri New at (310) 345-2668 or by email at [tnew@aol.com](mailto:tnew@aol.com) or Dan Boysen at (202) 485-3448 or [boysen@dccc.org](mailto:boysen@dccc.org).

Email for Contribution notifications: [Boysen@dccc.org](mailto:Boysen@dccc.org) , [tnew@aol.com](mailto:tnew@aol.com) , [bruce@dccc.org](mailto:bruce@dccc.org), [Gaylord@dccc.org](mailto:Gaylord@dccc.org)

NOTE: For events with the White House where you need to collect vetting, in the pop-up window you’ll want to include information on contacting you for vetting.

1. Create invite

Follow the protocol very carefully when sending invites and/or changes to invites. There is a multitude of people and departments who must approve the layout, language, order of Members listed, etc. Follow the protocol outlined in the DCCC Finance Training manual to ensure that this is done correctly. NOTE: The sooner you get your invite approved (and this can take up to a couple of days), the sooner you can start promoting your events and raising money.

1. Target your attendees based on location and audience size

The West Director will give you direction on this. You will pull a list from NGP for whom you want to send the invite to. You will also want to include prospects on this invite.

1. Send out invites by email, and where applicable, by ground mail

Depending on the event you will either print the invites yourself, or you will work with a third-party printer. Invites are printed on 5x7 paper and the reply card on 4x6. Make sure to include an envelope for the reply card.

1. Call through invite lists

Calling through the list can depend on where the invite is in terms of goal. If the event is going really well, calling through the list is not always necessary. However, if the progress toward goal is slow, calling through the list is crucial. And sometimes, you will need to call through twice. This can be one of the more time-consuming parts of event prep and is an easy task to ask for help from other assistants.

1. Keep RSVP spreadsheet up-to-date with attendees and money in

As it stands right now, this is the responsibility of the West Director.

1. Talking points request

Anytime you have an event that involves Leader Pelosi or Chairman Israel, you need to request talking points for the event. This should be done when the event is approximately two weeks out. This gives Katie (DCCC Staff Writer) enough time to draft the talking points, and also allows her to look ahead at what will be politically relevant at the time of the event. You will need to give her a snapshot of the event, noting any Members of Congress, Candidates, VIP’s and event hosts so that she can write in acknowledgements, as well as the issues of interest to the audience. An LGBT event should focus on the legislative initiatives dealing with civil rights and marriage equality, for example.

An example of a talking point requests are found here: S:\West 2013-2014\Q2 2014\140507 LA POTUS.

It is best to get something to Katie 2-3 weeks ahead of the event. Even if you only have very basic information, it’s better to send her something with holes and fill them in later. Katie works on a lot of different talking points at one time; it is important that she knows what is needed so she can prioritize.

1. Briefings for Leader Pelosi and Members of Congress in attendance

This is a shared responsibility. Before every event, you will have to go through a checklist and make sure you have the following briefings completed: a Main Briefing, an Attendee Briefing, an Event Card, and a Thank You Memo.

Examples for these materials can be found here: S:\West 2013-2014\Q4 2014\141020 HRC SF Women\NP Materials

*Main Briefing:* For a “Main Briefing,” the event information is listed in detail. This includes the background of the event, why the particular Member who the briefing for is attending, and specifics about the layout and timeline of the event. It will also include a detailed biography of the hosts, notes of their past involvement with the DCCC, and their giving history from 2007-present. Additionally, the biographies of each Member attending will be in the briefings that go to the Leader or the Chairman, and this will also include any information about their DCCC Dues giving for the cycle.

*Attendee Briefing:* For an “Attendee Briefing,” which includes a brief biography and giving history of each attendee, two liners need to be updated and approved for each event and they also provide a helpful snapshot of donor’s activity in past cycles. Also be sure to pair together an individual and their partner, so whoever reads the briefing will know that they’re together. An example of a two liner is below:

**Dorine & Jon Streeter**

Jon is a partner with Keker & Van Nest LLP in San Francisco, CA. He specializes in complex commercial civil litigation. Jon is currently serving as a member of the Head Royce Board of Trustees, vice chair of the California Commission on the Fair Administration of Justice, and is member of the board of directors of SFJazz, a non-profit presenter of jazz music in the San Francisco Bay Area. Dorine is Jon’s wife. Dorine is the executive vice president of real estate investment management at the James Campbell Company. ***Dorine & Jon contributed $32,400 to the DCCC for this event. In April 2013, they contributed $32,400 to the DCCC and attended the DCCC Dinner at the home of Ann & Gordon Getty with special guest President Barack Obama. Dorine & Jon attended the February 2013 DCCC Political Update Luncheon in San Francisco. Dorine attended the Ultimate Women’s Power Luncheon in San Francisco in October 2011 and contributed $2,500 to the DCCC for that event. Dorine and Jon attended the DCCC Dinner at the home of Ann and Gordon Getty in April 2010 and contributed $30,400 to the DCCC for that event. Dorine & Jon contributed $28,500 to the DCCC in January 2009. They also contributed an additional $30,400 to the DCCC in December. Dorine and Jon attended the 2009 Inaugural events through the DCCC and also attended the 2009 Napa Valley Issues Conference. Dorine and Jon contributed $28,500 to the DCCC in the 2008 cycle and attended the Democratic National Convention with the DCCC.***

NOTE: All updated two liners for Speaker’s Cabinet members have been saved in NGP under Additional Contact Information 🡪 Biography.

*Event Cards:* “Event cards” will be different sizes depending on whether they’re for the Leader or the Chairman. These cards usually include a timeline of the event and the names of anyone they are going to need to acknowledge, such as VIPs or Members in attendance.

*Thank You Memo:* The “Thank You Memo” is a memo only used for Leader Pelosi. This lists any hosts and Members that the Leader will want to thank for their participation in an event. Make sure to list the individual as well as their partner or spouse so the Leader can also thank them too. Also be sure to list more than one number, if possible, and to verify each number before it’s listed. This is also where you let the Leader know who will be receiving an orchid and when.

NOTE: There will be a deadline for when these materials need to be completed AND approved by. This deadline is set by Leader Pelosi’s office and can be anywhere from 1-4 days before an event. The Finance Operations Director will send around these deadlines as soon as she is aware of them. You must do your very best to have all of the materials approved by this time, at which point you send the final versions to the Finance Operations Director, who then “sends them up” to Leader Pelosi’s office. You can still send updates to the materials after they are “final”.

1. Event Materials

A couple of days prior to your event, you will need to organize certain items to ensure the event runs smoothly. It is your responsibility that event materials are gathered and prepared. Use a check list to make sure you don’t forget anything. The Event Checklist is found here: S:\West 2013-2014.

*The event materials that you are solely responsible for creating are the following:*

1. Name tags
   1. We always use clip name tags for events
   2. If it is a very large event, we will use clip name tags for the clutch/photoline and sticky name tags for general guests
2. Table tents/place cards
   1. Only if you are doing a seated meal – this allows for assigned seating
3. Escort cards
   1. “You are seated at table 1”
   2. Only if there is more than 1 table at a seated meal – if the event is small it will be done around one large table and therefore does not )
4. Table numbers
   1. For the smaller, seated events – we provide the table numbers

*Use a check list to make sure you don’t forget anything. The Event Checklist is found here: S:\West 2013-2014. Below is a copy of the event checklist:*

Briefings:

* NP Main Briefing
* NP Attendee Briefing
* Member Briefings
* Event Cards
* Remarks (2x)
* Event Spreadsheets (2-3x)

Accessories

* Name tags
* Name tag inserts (plus extras)
* Name tag holders (plus extras)
* Escort cards (2x)
* Click cards
* Table tents
* Table Numbers
* Extra NP card stock

Misc/Additional Supplies

* Extra pack of note cards
* Remit/contribution forms
* Big white envelops (3)
* Problem check forms
* Sharpies, Pens & Pencils
* Zip drive with all files
* Any specific literature/materials that NP/leadership wants to have at the event

**Nametags:**

**Excel**

In the Excel document, you will have two columns. In the first column, you just write everyone’s first name. In column 2, you write their last name. You can just copy and paste from your event spreadsheet. \*It is very important that you make sure that to write the proper title for the guest in column 1. All elected officials are “Hon.” The only exceptions are “Chairman” Steve Israel and “Leader” Nancy Pelosi. For non-elected officials – the most common title is “Dr.” (we don’t use “Mr.” or “Mrs.”).

**Word**

Then just plug this spreadsheet into Word and merge using the wizard. The style of name tag we use is Avery 5390. Each name tag should be in ***Book Antiqua***, bold and italics, 36pt font, and centered into the middle of the name tag. In wizard, there is a button for “update all,” when you’re arranging the name tag—this works for updating the font but not for making the tags centered. You have to highlight the columns and under the layout tab, you have the click the center picture. Then just finish the merge and make sure you click edit individual tags. Then print out the name tags on regular paper first and have Liz check them over to make sure names are spelled right and titles are correct.

***Just a few quick pointers***

\*Always print a name tag for the spouses of your elected officials.

\*If you have guests that aren’t from your region attending the event, have the regional director look over the name tags for spelling and title things.

\*Usually you should only print name tags for those on the spreadsheet who have said they are coming, but on occasion it’s better to print everything in case there are people who might just show up.

\*For certain donors we will do multiple name variations – either because we know they prefer the option or they are a new donor and we don’t know whether they prefer to go by Mike or Michael (for example).

**Printing**

Wright is the easiest to use for name tags. All you have to do is check that the tray is set to MPF and click print. Make sure that you feed name tag sheets into the printer correctly.

**General Event Tips:**

* SAVE EVERYTHING – keep organized folders in your outlook for each event. I had mine organized by state, and then subfolders for the event. It’s an easy way to keep everything in one place so you can find it quickly. You also want to keep everything saved in the correct folder on the shared drive. Create a new folder for each new event.
* Materials – a couple weeks before the event make sure that you have all of the extra materials that you need – in particular, NP card stock and name tags (holder and inserts).

**SPECIAL: White House Events**

When doing events with principles from the White House – President Obama, First Lady Michelle Obama, Vice President Biden – there are few different protocols that are different.

*Protocols that are different for these events:*

* Vetting – This is by far the biggest difference from all other events and honestly, the biggest pain. For events with POTUS, FLOTUS and VPOTUS that are less than about 150-200, everyone attending needs to be vetted. This means guests and all staff (DCCC staff and also catering, security, valet, etc.).
  + The different offices have their own spreadsheets and way of doing it, but they usually require at minimum: full legal name, social security number, date of birth and employer/occupation.
  + Vetting docs for the last POTUS event: S:\West 2013-2014\Q3 2014\140723 SV POTUS\Vetting
  + Vetting docs for the last VPOTUS event: S:\West 2013-2014\Q4 2014\141006 LA Fox Event\Vetting
  + Tips:
    - Before moving forward with collecting vetting, it is best to double check what format is needed this round. Krista will generally do this with whomever she’s been working with at the White House.
    - Create a column on the master commit sheet for the event to keep track of vetting.
    - Call guests immediately after they RSVP to ask for this information. Often, you will get incomplete vetting and will need to follow-up to get everything.
    - You CANNOT submit incomplete vetting for someone.
    - The final deadline for vetting is usually 72 hours before the event. The White House always says this is a drop-dead deadline, but we have always snuck people past afterward (we only do this for either people who are maxing out, very longtime friends of Leader Pelosi or for special friends of the hosts…and we do not want to piss the hosts off).
    - No, it does not matter if someone has been vetted by the White House before. They have to be vetted for each event no matter what.
    - Vetting is sent to the White House in rounds. The first round is usually sent up to a week out from the event. Krista will ask for the rounds when she/the White House has expressed they want them.
    - You usually need to keep two separate vetting docs – one for staff and the other for guests. The information required for the two is sometimes different. Again, it all depends on what the POTUS/FLOTUS/VPOTUS staff decide they want to do this time around.
    - Vetting rounds are always sent to Krista, cc’ing Missy, Stella and Team West. Krista is the liaison between the White House and the DCCC.
    - It’s very important to double, triple, quadruple check that you have everyone vetted that you are supposed to vet. If you do not vet someone who was supposed to be vetted and the show up to the event, the Secret Service will not allow them into the event.
    - Yes, sometimes guests do not pass vet. There are a couple old donors that we have that we already know do not pass vet (i.e. Bill Lerach – his wife is Michelle Lerach). It is your responsibility to make sure we have passed along the vetting information to the White House. However, the West Director will take over telling the guest they did not pass vet and therefore are not allowed to attend the event (we emphasize this is per the White House, not the DCCC). This is definitely one of the most awkward, if not the most awkward, conversations we have to have with donors.
* Stickers – For events where there are different groups for clutch and photoline, we will use stickers on the name tags to differentiate who is in the clutch and photoline. This is so that it is obvious to everyone who should be where. It also helps the Secrete Service know who to look for.
* Baggies – For events with the President that have a Q&A portion, we are required to take cell phones from everyone attending. Yes, everyone! (But not staff.) To keep track of the phones, we put sticky name tags on zipper lunch bags and place the phones in them. Then, when the event is over, people can easily grab the correct phone.

**SPECIAL: Annual Women’s Event in San Francisco**

This event is always the largest West region event and is one of Leader Pelosi’s favorite events. It is usually held in the largest ballroom at the Fairmont Hotel in San Francisco, which accommodates 600-800 people, and has a big-name female as the guest speaker. It is an event that celebrates women members of Congress and candidates. And because it is so large and one of Leader Pelosi’s favorites, there is a lot of pressure to execute everything perfectly.

The 2013 event with First Lady Michelle Obama was originally supposed to be in October 2013, but because of the government shutdown was rescheduled to January 31, 2014. This event had about 600 people.

The 2014 event with Hillary Rodham Clinton was held on October 20, 214. This event had roughly 800 attendees. This was by far the largest event.

*Protocols that are different for this event:*

* Vetting – this is only required if done with someone from the White House. For the event with the First Lady, traditional vetting was just done for those in the clutch and photoline. For the event with Hillary Clinton, a more relaxed version of vetting was done also for the clutch and photoline. The vetting process is explained above.
* Name tags/Escort cards – For such a large event, we only use the clip name tags and escort cards for the clutch and photoline. For everyone else, we use sticky name tags. For these we also put their table number on the name tag. Much easier than clib name tags for everyone!
* Stickers – Like the White House events, we use obvious stickers on the name tags to denote who is clutch and who is photoline.
* Signage – For an event this large, we will have somewhere between 10-20 large signs created to post around the hotel. These signs will mostly be directionals for guests.
  + See here for examples of posters for the last event: S:\West 2013-2014\Q4 2014\141020 HRC SF Women\Signage
  + For this event, I have always used the FedEx located at 585 Kearney Street in San Francisco. They have always been very accommodating.
  + Use the posters from the last event as a guideline for what kinds of language we’ll need on the signs. Check with Krista that this is everything she needs (sometimes it changes slightly depending on which rooms we’re able to secure for the event).
  + At the very, very latest get this order approved one week before. This is a large poster order for them, so it will take them some time.
  + I always ask for: portrait, 24” x 36”, black & white, stretched to fit the page, and mounted on foam board

**FEEDBACK**

**Lessons learned:**

* Details. Details. Details. Working in Finance at the DCCC, you work very closely with Leader Pelosi, in particular on the West team. Leader Pelosi has high standards for all of her staff, which goes down to the most minute details. You cannot double or triple check things enough!
* Working at the DCCC is like working with your family. You spend a tremendous amount of time together and loyalty is everything.
* Do not succumb to the GOTV weight gain! No but really, that pizza in the kitchen might sound like a good idea, but not when you’ve had pizza already almost every day for the last week.

**Feedback on the position this cycle:**

I think that the West team worked very well together this cycle, at least since I started in January. I think three people is the right number for the West region to cover the workload. This position is definitely heavy on administrative work, so it is best for an entry level position. One aspect of having a three person team in Finance is that the work disseminated to the Finance Assistant was a much more narrow scope of types of work than how it is structured for a two person team. This is not necessarily anyone’s fault or a bad thing, it is just how the work gets easily divided when there are three people tasked with the same kind of work (at a greater volume). As a result I felt ill-prepared to take on more responsibility.

**Tools used that were really helpful:**

* Exit memo – This is the first organization I have worked out that consistently uses an exit memo for departing employees. This is definitely one of the best tools the DCCC can give to their employees.
* Coworkers – This may not be the tool you were thinking of, but honestly my coworkers at the DCCC were probably my biggest resource. Not just my team and the other Finance Assistants, but my coworkers in other departments. So many of the people that work at the DCCC are the best at what they do and they know so much about what they do. For example, I found that those in Targeting are really goo at Excel. In short, the people who work at the DCCC are incredibly smart and are an absolute resource.
* Political Moneyline – Other than NGP and Google, I would say this is the website I used the most to do my work at the DCCC. I used it when doing contributions vets, prospecting, verifying information about a donor, etc.

**Interaction with other departments:**

This is an area of the DCCC that has improved and could probably still use improvement. I started right after the interior of the offices were remodeled, but from what it seems, putting the pods together was helpful to interaction at the least between the regional pods. My desk is an overflow desk for the West pod, so I sit next to the South Finance Assistant and the Midwest pod. As a result, I got to know the Midwest pod a lot better than my non-Finance West pod members. In terms of getting to know other departments, if it wasn’t for being deployed for GOTV for the special election in FL-13 I wouldn’t have as many friends in other departments as I do. As difficult an experience it was, it was a tremendous bonding experience. I made friends on that trip that I’ve kept throughout my time at the DCCC.