FROM: Megan Nashban

DATE: 11.30.2012

SUBJECT: Northeast Finance Director Cycle Memo

**Job Title and Overview**

This position is responsible for leading the day-to-day fundraising operation of the Democratic Congressional Campaign Committee focusing on raising money from New York, Pennsylvania, Connecticut, Rhode Island, Massachusetts, New Jersey, Vermont, New Hampshire, and Maine.

This position is responsible for ensuring that the DCCC staff in this region is effectively working with the MOCs from the region as well as the donor/raiser communities. This is also responsible for overseeing all events that are conducted in this region.

The Northeast Region was compromised of several different staffing structures throughout the 2011-2012 election cycle but ultimately finished with this position overseeing a Northeast Finance Assistant in Washington, DC and a New York City area consultant.

***General Overview***

The following states comprise the Northeast Region:

Maine

Vermont

New Hampshire

Massachusetts

Rhode Island

Connecticut

Delaware

New Jersey

New York

Pennsylvania

Traditionally the northeast region is the second largest fundraising region of personal contributions, behind the West for the DCCC.  The most important and most active areas of fund raising in this region are New York City and Boston, Massachusetts.  Connecticut, New Jersey, Rhode Island and Pennsylvania are also active, while Maine, Vermont, Delaware and New Hampshire produce very little.  Throughout the 2011-2012 cycle New Hampshire produced more than it had in the past and should continue to grow if prospecting is thoroughly executed. Also throughout the 2011-2012 cycle the Northeast Director worked to further develop a fundraising presence in Vermont which was met with resistance but is feasible if relationships can continue to grow.

Many of the region's Members are active, and with Chairman Israel now leading the DCCC he has been very active in the New York City area. An added benefit that Chairman Israel brings is his ability to raise in the New York City area without Leader Pelosi.

New York City brings in the most contributions and presents a special challenge due to the large amounts of fundraising from other parties, organizations and candidates, making competition for attention and funds in NYC fierce.  Many of the major donors in the city feel that they have a personal relationship with the Leader and respond best to her directly. We have worked this cycle to transition some of the Leader’s relationships in New York City onto the Chairman so that he can continue to grow his own network as well as take some of the time necessary off of the Leader.  New York City high dollar donors generally respond best to 1:1 meetings with Leader Pelosi- which is the method of solicitation they have most become accustom with. In regards to $1,000-$10,000 donors we did best when engaging these donors in niche and targeted events such as Women’s Event’s or New York candidate focused events. New Yorkers care about New York but also how New York plays into the National Picture and we had a lot of success in the 2011-2012 cycle discussing New York as a part of the National Picture.

The Leader will travel to New York at least twice a quarter.  Her daughter Alexandra lives in NYC with her husband Michiel and her two grandchildren, and will likely want to see them on any trip she is there.

Boston is a smaller yet powerful area for us that has only continued to grow throughout the 2011-2012 cycle.  We have a handful of supporters who both write and raise, and base most events around these raisers, whom we have been able to go back to time and again, while expanding our base as well.  Congressman Ed Markey is also very involved with DCCC events in Boston. He helped raise for all events in Boston this cycle and will make any calls asked of him. Congressman Markey is very number focused and responds well to hitting goals and the encouragement of Leader Pelosi. We tend to go to Boston about once or twice a quarter.  While the events are in the mid range of raising, they are usually solidly successful. On Leader Pelosi’s trips to Boston we try to fill 3-5 meetings and an event as the general structure for the trip. Also, we do a quarterly Political Update gratis event in Boston that Chairman Israel has generally lead. The DCCC had an event with President Obama in Boston in March , 2011 which raised over 1 million dollars. Throughout the cycle the DCCC raise 1.7million total from Boston. This Presidential event made it clear that Boston responds well to high profile surrogates.

Overall in my 2011-2012 fundraising experience the Northeast Region worked very hard this cycle to prospect and grow new donors which we did exceptionally.

***Regional Structure***

The 2011-2012 Cycle had several different structures to the Northeast Region.

The region started the cycle with a DC based Northeast Finance Director/Deputy National Finance Director and a DC based Northeast Deputy, a New York area Consultant and a New York office consisting of a New York Finance Director and a New York Finance Assistant.

The region finished the cycle with a DC based Northeast Finance Director and a DC based Northeast Finance Assistant and was rounded out by a New York area Consultant.

My recommendation for structure is that there is no need for several hands in the pot, however because of the size of the region and the pockets of money and new money to be found and cultivated there is a need for strong fundraisers in all positions. As such I recommend a Northeast Director, a Northeast Deputy and a NY consultant.

***July 2011-Dec 2012 events***

**2011**

**July 10, 2011- DCCC Hamptons reception at the home of Mort Zuckerman**

This event was executed by DCCC consultant Jackie Brot-Weinberg and NYC Finance Director and as such I was not involved

**July 24, 2011- DCCC New Haven Reception hosted by Rosa DeLauro**

This event was excuted by NYC Finance Director and as such I was not involved

**July 19, 2011- DCCC Political Update with Chairman Israel and Congressman Markey**

**RAISED: $5,000**

This event was the DCCC’s first trip back to Boston since the huge success of the Boston Presidential Event at the Boston Museum of Arts that raised $1million. Chairman Israel is very impressive during political updates and this was the first chance our donors go to really get to hear from him. This was a gratis lunch healed at the Liberty Hotel which is owned by former Speaker’s Cabinet Member Dick Friedman.

Congressman Markey made a few $2,500-$5,000 calls to members of the MA government affairs community and also made asks of specific donors at this event to host events later in 2011.

The DCCC should continue to do these Political Updates in Boston and use them as a chance to prospect and allow donors to get to know other members of DCCC Leadership so that these Members can then make asks of Donors down the road.

**August 3, 2011- DCCC SAAF event in Washington, DC**

**Raised: $100,000**

This event was executed by NYC Finance Consultant and NYC Finance Director.

After discussing with the NYC Finance Consultant if this event was realistic for 2014 it seems that SAAF has mostly disbanded as the majority of these donors have moved oversees since 2011- however, if there was a time that could coordinate their schedules and the Members they want it would be a great way to continue to get contributions we would not otherwise have access to.

**September 16, 2011- DCCC Congressional Leadership Annual Lunch hosted by Congressman Jim Larson**

**September 29, 2012- DCCC Congressional Leadership Annual Lunch hosted by Congressman Jim Larson**

**Raised 2011: $175,000 ($90,000 Individual)**

**Raised 2012: $225,000 ($75,000 Individual)**

This event is Rep. Larson’s annual event which traditionally raises between $150,000-$200,000 for the DCCC- it also traditionally does better in the on year than the off- which was also evident in this cycle’s events. This event is held in coordination with Rep. Larson’s annual bocce tournament and as such the date will be scheduled several months in advance and the DCCC should reach out early April to ask what the date will be and flag for Leader Pelosi’s schedule.

Rep. Larson’s staff will do much of the heavy lifting for this event and will ask Leader Pelosi to make a limited number of calls. Rep Larson also has a number of untapped Jewish donors who he feels Chairman Israel could be helpful in engaging support from so it would be ideal to include Chairman Israel in this event moving forward. Please note this event tends to raise heavily in PAC $$s and in 2012 raised more PAC then individual.

**September 19, 2011- DCCC Biotech Roundtable lunch hosted by Bob Coughlin and Ed Markey**

**Raised: $50,000**

DCCC staff and Congressman Ed Markey approached Bob Coughlin about hosting this event at the Political Update in July 2011. This event was attended by several members of the MA Congressional delegation and Leader Pelosi/Chairman Israel did NOT attend. Bob Coughlin did all raising for this event while asking a few of the Members to make targeted calls. This is not an annual event and raised several new PAC contributions while being low in individual contributions.

A similar event was hosted by Bob Coughlin and Nick Littlefield in 2009. Nick has a larger network then Bob and a relationship with Leader Pelosi who he is very fond of . My suggestion is that if this event is asked of in the 2014 cycle, that Leader Pelosi asks Nick to be involved and is given a goal of $75,000.

**September 19, 2011- DCCC Speaker’s Cabinet Boston Dinner**

**Raised: $32,000**

Leader Pelosi wanted to host a thank you dinner with Speaker’s Cabinet members in Boston to thank them for their early support through the March 2011 Boston Presidential and to prospect new donors. This event was not an easy event to solicit new cycle money from- however we did a day of meetings prior to this event with Leader Pelosi which was VERY successful in securing new contributors and money.

**November 20th, 2011- DCCC Roundtable lunch with Bill Daley and Chairman Steve Israel**

**Raised: $95,000**

Speaker’s Cabinet members Jack Bendheim and Peter Joseph did all raising and contributing for this small event. There was no invite or set contribution level they were just given a goal of $100,000. They executed this very impressively and should be engaged again this cycle in a niche event.

**October 9, 2011- DCCC Cocktail Reception hosted by Rep. Jim Himes at the home of Francisco Gonzalez and Jeannette Baez in Greenwich, CT**

**Raised: $55,000 ($15,000 Himes Member Dues)**

This was a small DCCC cocktail reception hosted by Congressman Himes. Congressman Himes asked that Chairman Israel and Congressman Barney Frank attend this event as he felt it would aid to the success. Congressman Himes did all raising for this event and while the initial goal was $75,000 it was not met with the success we would have hoped. Congressman Himes invited many people to the event as his guests in order to fill the room. However, through this event Congressman Himes was able to secure the Speaker’s Cabinet contribution of $30,800 from Susan Mandel.

**October 12, 2011- NYSAFAH DC Cocktail Reception**

**Raised: $100,000**

DCCC Speaker’s Cabinet Member Ron Moelis asked Leader Pelosi and Chairman Israel to be involved in his organizations DC conference and in return they asked him to host a DCCC clutch event following the conference and committed to raise $100,000 for the DCCC. These were mostly all new DCCC donors who came through NYSAFAH.

When Ron was approached about doing this event again, he made note that he wanted to do a California based event for 2012. NYSAFAH has decreased its staff and as such Ron was concerned that he himself would have a hard time raising this necessary contributions on his own- something to consider if asking to do this event again.

**October 31, 2011- Bob Crowe Boston Roundtable Lunch**

**Raised: $55,000**

Chairman Israel and Congressman Markey met with Bob in July 2011 and asked that he host an event and join your Speaker’s Cabinet. Bob asked for Leader Pelosi to be the special guest at that event. Bob raised $55,000 total through this event which included DCCC, PAC to the Future and Pelosi for Congress contributions. Bob has a large network of Boston donors that he has the capability to raise from, however sometimes he over commits himself and as such is not able to do as thorough as a job of necessary.

**November 1, 2011- DCCC Women’s Breakfast at the home of Ambassador Swanee Hunt**

**Raised: $75,000**

DCCC staff reached out to Ambassador Hunt to ask her to host this event and raise $75,000 – the Ambassador agreed but asked that others be included in raising for this event. Congresswoman Niki Tsongas and Leader Pelosi made calls for this event and this brought in a large number of new DCCC donors and close friends of Ambassador Swanee Hunts. This event has the potential to grow especially if Rep. Allyson Schwartz is looped into it- as she has a large network in Boston as well. Also with two Democratic Women Members in New Hampshire they should be looped into this as well and asked to raise.

**November 9, 2011- Cocktail Reception with Mayor Mike Bloomberg hosted by Rep. Joe Crowley**

**Raised: $80,000**

Congressman Crowley offered to host this event for the DCCC and his staff arranged for Mayor Bloomberg to be the special guest. All contributions were raised by Congressman Crowley and Chairman Steve Israel. This event was at the home of Ara and Rachel Hovnanian who have the capacity to be Speaker’s Cabinet members and also raise from members of the Hovnanian family and the Armenian community. Congressman Crowley raised California based donor- Peter Lowy’s Speaker’s Cabinet membership through this event. Lowy committed to contribute towards this event and an additional $30,800 in 2012 – the additional contribution did not happen but DCCC staff should ask Rep Crowley to secure these two checks for the 2014 cycle.

**December 11, 2011- DCCC Boston Dinner hosted by Arnie Hiatt and Marcia Morris**

**Raised: $250,000**

Arnie offered to host this event with Leader Pelosi as the special guest, Arnie did all raising for this event and recruited 5 new Speaker’s Cabinet members and engaged 3 Speaker’s Cabinet members who had not given to the DCCC in 2+ years.

Arnie is a close relationship of Leader Pelosi and has a phenomenal network. Arnie feels VERY strongly about campaign finance reform and it is his passion- he also feels very strongly about Leader Pelosi and wants to be as helpful as possible to her. Arnie should be kept aware of all DCCC going ons and will prove to be helpful on his own but Leader Pelosi should meet with him in Q1 or early Q2 of 2013 to discuss how he would like to be helpful to the DCCC. Keep in mind Arnie usually approaches the DCCC when he’s ready and is also very generous to candidates and will seek the advisement of the DCCC and Leader Pelosi in which candidates need help at times that he is ready to contribute.

**Jan. 19, 2012 NYC Dinner hosted by Karen and Dennis Mehiel and Vin Roberti in New York, NY**

**RAISED:$123,400**

Vin Roberti introduced the Mehiel’s to Pelosi and the DCCC and ever since 2006 they have hosted a DCCC Dinner with Pelosi at their home. The home is beautiful and is an ideal location for a renewal New York dinner. They often use the dining room for cocktails (to the right of the main entrance) and then the living room for dinner (to the left of the main entrance). Vin Roberti always helps raise for this event. The Mehiel’s are Leader’s Cabinet members and usually max for their event, but do not raise. Besides Vin’s friends and colleagues, most of the attendees for this event are renewing Leader’s Cabinet members.

I would suggest doing a meeting with Dennis and the Leader and securing his and Karen’s max out contribution and then asking if they WANT to host their annual event. Since Dennis doesn’t really raise for this annual event (although he has a network he COULD raise from and should possibly be asked, separate from Vin to raise) I think a renewal dinner at a different location could bring in other money rather than the traditional immediate checks who will contribute wherever the event is held.

**March 5 2012- Womens Issues Conference and Power Lunch hosted by Sarah Kovner and Anne Hess**

**Raised: $325,000**

Sarah Kovner and Anne Hess approached the DCCC about hosting an issues conference and lunch to highlight the women democratic congressional candidates and to raise funds for the DCCC. Anne and Sarah felt very strongly that they needed to offer their network more than the usual womens event and wanted it to be a conference with substance and policy discussions and as such they had 3 planning breakfasts of a host committee that grew to 40+ women who flushed out how they wanted this event to look and be structured. This event had 3 components a breakfast, an issues conference and a luncheon and had a range of low dollar to high dollar contributions. This event logistically was not easy but the outcome was beautiful and very successful . The spirit of these women and this unofficial group should be retapped in 2013 and a roundtable of what theyd like to see in 2013-2014 should happen to engage their support early on. They deliver immensely when allowed to be apart of the process and not just seen as a check.

Anne and Sarah are a HUGELY valuable asset to the DCCC and just great ladies. They are very passionate about Democratic Politics and have been raising and involved in the process since the ‘80’s. They usually approach the DCCC with ideas they have and see how we can execute it. They are also heavily involved in the DSCC and as such it is important to make sure they are treated well and want to stay involved with the DCCC.

 **March 14, 2012- Rep. Velazquez Brooklyn event**

**Raised: $35,000**

Rep Velazquez approached the DCCC and Chairman Israel about this event and did all raising herself without seeking or asking for DCCC approval or involvement. The DCCC has a limited presence in Brooklyn and Rep Velazquez has a phenomenal network. In the future this event should be better organized and if a clear conversation can be head with the Congresswoman a goal of $75,000 should be asked.

**May 3, 2012- Boston Cocktail Reception hosted by O’Neill and Associates**

**Raised: $50,000**

This reception was the result of a meeting between DCCC Chairman Steve Israel, Congressman Ed Markey and O’Neill and Associates VP John Cahill in Jan 2012. O’Neill and Associates raised several PAC contributions for this event but did not have an easy time raising individual contributions. O’Neill and Associates has a DC office and together the two offices have the capacity to raise $75,000-$100,000 in a year if done strategically- it might be worth meeting with their DC office early in the cycle to see how they want to be helpful to the DCCC early on- several of their clients are looking to grow their DC presence and approaching them early in the cycle might prove useful to us.

**June 11, 2012- CT Women’s Event**

**Raised: $125,000**

After the success of the NYC Women’s Issues Conference on March 5, 2012 Kristan Peters-Hamlin approached the DCCC about organizing a similar event in Connecticut. DCCC staff asked Congressman Himes and Congresswoman DeLauro to Chair this event and aid in raising contributions for the DCCC through this event. This event did not get much support from the Member’s involved even though they were excited- it could have potential to work but the women involved need to have more capacity to reach out and solicit hosts and there needs to be more pressure put on the Members to help with this event.

**June 13, 2012- DCCC Lunch in Princeton NJ hosted by Congressman Holt**

**Raised: $125,000**

This is the first time since 2009 that Congressman Holt has hosted an event for you and the DCCC. He hosted a joint event benefitting the DCCC and his re-election committee on February 29, 2008 which raised $100,000 for the DCCC and a second event on November 14, 2009 that raised $75,000 for the DCCC. The goal for this event was $100,000 and Rep. Holt far exceeded that goal. While he was nervous with the goal to begin with he ended up doing a phenomenal job. Rep Holt responds really well to callsheets and his finance director Annie O’Toole does will going through lists line by line and discussing a plan for each donor. She also likes the idea of DCCC donors who are not in Rep Holt’s immediate universe being reached out to by Rep Holt and while getting him to do call time is tough, when he does it he does a great job. Annie also holds many of his personal relationships and as such can make up from the lack of call time he is able to do. Congressman Holt’s district has several big hitters and he has the capacity to raise beyond this- it would be worthwhile to get other members of the delegation involved in a larger NJ (central NJ or North NJ) event and to make this bigger then this years.

**June 15, 2012- DCCC NYC Equality Day**

**Raised: $100,000**

Chairman Israel met with Charles Myers and Mitch Draizin in 2011 and discussed the idea of hosting DCCC Equality Day events in New York City. Sean Eldridge and Chris Hughes hosted LGBT events with Mitch and Charles at their home in New York City on June 6, 2011. That event raised $100,000 for the DCCC. Charles and Mitch wanted to host Leader Pelosi and the LGBT Members of Congress for a similar event in 2012- Chris and Sean were not able to be involved bc they were getting married a few weeks later.

Mitch and Charles have a phenomenal network but were spread VERY thin this year due to the Obama campaign. This event should happen again (especially because of all the new members) but Sean and Chris should be engaged and perhaps a Host Committee should be formed earlier- and the commitment of the Members to raise even a smaller amount should be asked.

**June 25, 2012- DCCC Comcast Philly Breakfast**

**Raised: $100,000**

This event was a buffet breakfast reception composed of new and renewing DCCC donors that Whip Hoyer was the surrogate of this event and Schwartz and Fattah also attended. David Cohen hosted a DCCC meet and great roundtable discussion in December, 2011 at Comcast Headquarters to prospect for this event. Congressman Crowley, Chairman Israel and Congresswoman Schwartz attended that breakfast. Comcast is an important relationship for the DCCC and more importantly their Executive- David Cohen holds a lot of keys to the Philadelphia donor base. This event was not as successful as it could have been because of David’s reluctance in hosting the event- pushing it off several times and hosting several DNC/Obama events before our event hence limiting their network. The DCCC should continue to grow this relationship as it is delicate and important. A strategy with the DC team should be developed early on for how to court and engage Comcast and David Cohen in a successful manner.

**July 17, 2012- DCCC Vice President Biden NYC Dinner hosted by Jeff Gural**

**Raised: $150,000**

This was the easiest event we ever had to do- Jeff is a godsent and raised all contributions- this is his shtick and he needs no help from us- a niche event should be found for him again and if he commits he does great

**August 23, 2012- Joe Kennedy Victory Fund reception and dinner hosted by Ethel Kennedy in Hyannis Port, MA**

**Raised: $160,000 (DCCC)**

Joe Kennedy III offered to host a joint event between the DCCC and Joe Kennedy for Congress. Joe reached out to his grandmother Ethel Kennedy (widow of Bobby Kennedy) to host the cocktail reception and to his aunt and uncle Kiki and Ted Jr. to host the VIP dinner at their homes in Hyannis Port, MA. All contributions for this event went to the Joe Kennedy Victory Fund or if guests chose to, for the cocktail reception only, they could contribute to candidates, such as Congressman John Tierney’s re-elect campaign. The Joe Kennedy Victory Fund is set up so that the first $5,000 of every contribution goes to Joe Kennedy for Congress and the remainder goes to the DCCC.

Rep. Elect Joe Kennedy III will be a great asset in Mass to the DCCC and a plan should be discussed with his team to see how he wants to be most helpful. We have had trouble securing Cape, Nantucket, MV $$s and he could prove very valuable there and also within Boston (which is right next to his district) his name alone attracts and then he has lots of loyal (R and D) Kennedy donors who he can call to ask for DCCC. He should be asked to do 2 events for the DCCC – a summer event and then a Boston based event.

**September 27, 2012- DCCC Philadelphia Lunch with special guest Sec. Albright**

This event was personally my most successful event- the DCCC has had trouble raising, in the ways that it could, in Philadelphia and this event was able to grow donors we had never seen before. It was tremendously aided by Rep. Schwartz, who while she dragged her feet , coming up with several excuses into the original date and success of this event, ended up being phenomenal and Gov Ed Rendell who has been hesitant to fully commit to the DCCC also proved very helpful in a way he previously hadn’t been

Philadelphia is a gold mine, but what I have learned is that Philadelphia takes a LOT of hand holding and babysitting- the donors want a relationship, not just one check, and need to know that their contribution has more value than the single event they will be attending. Philadelphia will need attention and relationship building and a plan should be brought up with and executed from the beginning of the cycle.

Also Rep. Fattah and Brady have large capacity but weren’t engaged with the DCCC this past cycle- they should try to be engaged as they have loyal donors who could prove new for us.

**October 4, 2012- Battleground NY Victory Fund**

**Raised $750,000 (total)**

Another Anne Hess and Sarah Kovner IMPRESSIVE success. Anne Hess, Craig Kaplan, Sarah and Victor Kovner approached the DCCC about forming the Committee for Battleground NY to draw attention, volunteers, and financial resources to the 8 competitive NY congressional races and bring awareness to the fact that NY is a battleground state for the House in 2012. Leader Pelosi asked Vice President Al Gore to be the special guest for this event.

The Battleground NY has the capacity to be another Anne and Sarah branded idea that grows- if it is possible to harness these donors into another event in 2013 and then a joint candidate/DCCC event in 2014 I highly suggest it- this brought a ton of new donors and hopefully the NY Delegation can be further involved and looped into this event from the beginning.

**October 22, 2012- Boston Paul Sagan Cocktail Reception**

**Raised: $75,000**

Congressman Ed Markey asked Paul Sagan to host a DCCC event with you as the special guest at his offices in Cambridge, MA as he had done previously in March of 2008. Paul agreed to host the event and contribute $15,000 to a combination of DCCC priority candidates and the DCCC Recount Fund. Congressman Markey and Congresswoman Tsongas made calls for this event. Paul has an enormous and loyal network but was feeling exhausted by this time in the cycle and wasn’t able to commit to raise in a means that he wanted to. That being said, from the simple emails he was sending we were able to secure new contributors solely through him.

Paul should be reached out to Q2 of 2013 and have a meeting with Congressman Markey and Leader Pelosi to see if he will rejoin the Speaker’s Cabinet ( as he has done previously) and raise from his family across the country (which he has also previously done). Paul has the capacity to raise $100,000 but quickly commits to the DSCC traditionally. Without the competition of the Presidential in 2014 he might be willing to be even more helpful to the DCCC.

**October 24, 2012- CT Susan Lehman cocktail and lunch**

**Raised: $75,000**

Following the DCCC Connecticut Women’s Issues Conference, Susan reached out to DCCC staff asking to host a prospecting cocktails reception and a fundraising dinner at her home in Greenwich, CT with a focus on women. Susan is a close friend of the Pelosi family, Nancy Corrinne Pelosi- was one of Susan’s bridesmaids in her wedding. Susan raised all contributions for this event from her personal network and they were ALL new DCCC donors and mostly new political donors.

A conversation should be had on how to keep these donors engaged with the DCCC and with Susan to see if she wants to be more continuously helpful.