memorandum

11/25/2014 9:40 AM

To: Kelly Ward

Cc: Missy Kurek, Stella Ross, Liz Robertson

Fr: Adam Blackwell, Midwest Finance Assistant

Dt: Tuesday, November 25, 2014

RE: Midwest Finance Assistant End of Cycle Memo

**OVERVIEW**

The Finance Department at the DCCC is one of the larger departments in the organization. For the most part, each region is made up of a Finance Director, Deputy Finance Director, and a Finance Assistant. The Midwest Finance Team is currently made up of a Director and an Assistant. The Midwest Finance Assistant reports directly to the Midwest Finance Director.

The Finance Department functions as a team. You will notice that during certain times of the month, different regions are busier than others. For example, if team West has a San Francisco, LA, and San Diego swing coming up in a week, and team Midwest is simply prepping for events 6 weeks away, you will be expected to help team West with whatever they may need. When you and the Midwest Finance Director have a swing, you **can** and **should** ask for help from regions that are not busy with time sensitive responsibilities. This is important to make sure 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. They will all be more than happy to help you.

The Midwest Finance Assistant’s primary responsibilities include:

* Assist the Midwest Finance Director in the day to day fundraising operations for the Midwest region, Native American Tribal Program, and the Muslim American Program *(explained in greater detail below).*
* Assist in the development and execution of all fundraising events.
* Prepare donor meeting and event materials and other reports, as necessary.
* Process all contributions for the Midwest region.
* Manage the NGP donor database for the Midwest region.
* Manage regional donor maintenance – thank you notes, orchids, etc.
* Other duties as needed.

*DCCC’s Native American Tribal Program*

The Midwest Finance team is responsible for fundraising from Native American Tribes. Tribes can contribute up to the same federal max as individuals, (currently $32,400). Tribes who contribute the federal max are members of our Tribal Council. The program is currently undergoing changes, but you will assist the Midwest Finance Director with the Tribal Program. You should continue to do research on members of our Tribal Council periodically. Oftentimes, elections and other occasions will occur. This is important to donor maintenance, discussed later in the memo. All files pertaining to the tribal program are in the Midwest Finance Drive, under the folder “Tribal Program.”

*DCCC’s Muslim American Program*

The DCCC’s Muslim American Program was founded by Congressman Keith Ellison and now also includes Congressman André Carson. Because both members are from Midwestern states, Minnesota and Indiana respectively, the program falls under the Midwest Finance team. Congressman Ellison began the program in 2009, and it is an annual event. You will assist the Midwest Finance Director in planning and executing the event. All past files for the event are in the Finance Drive, under the folder “Ellison Leadership Summit.”

The Midwest Finance Assistant position is a valuable one in that you often have the chance to take on additional responsibilities. Because the region does not have a Deputy Director, during busy times, you may have the chance to gain additional finance experience and take on more responsibilities that are not always offered to assistants. At other times in the cycle, the Midwest region will be quieter than others. Of course, you should help other regions that need it, but also consider asking the Midwest Finance Director for additional work or projects. There is always something you can do or learn.

*\*Please note: All 2013 – 2014 Midwest Speaker’s Cabinet donors have updated two-liners (biographies and contribution information) in their NGP record. The spreadsheet copy of this can be found in the Midwest Finance Drive under the “Lists” folder. The spreadsheet is named “2013-2014 SPC Bios.”*

**ADDITIONAL MEMO COMPONENTS**

* Processing Contributions
* Donor Maintenance
* Thank You Notes
* Talking Point Requests
* Call Sheets
* Prospecting Process
* Events
* Visa Processing

**Processing Contributions**

It is the assistant’s responsibility to process all contributions. When you receive new money, follow the below outlined steps immediately:

1. You will receive an email with a copy of the check and any accompanying documents. If it is a credit card contribution, you will receive an email with all of the contribution information.
2. Log the money into the “Money In” spreadsheet (found in the Midwest Finance Drive).
3. You should note the source of the check – ex. VPOTUS Chicago, NP Meeting
4. You should also note which members to give credit to or “tally” in NGP and on your spreadsheet.
5. Log the money into the daily money chain (only if the money is NEW – a new Hard Commit or a surprise)
6. Log the money into NGP – steps written below.
7. Save a copy of the check and a copy of the transmittal in the Midwest Finance Drive.
8. Print one copy of the transmittal for the Finance Operations Director.
9. On the transmittal, you should check boxes to verify the address and employer/occupation. You should also initial in the appropriate spot. If the donor needs vetting, you should write “vet passed” or “vet sent (date)” in the notes section of the transmittal.
10. Send donors who give $5,000 or greater to vetting (directions below)

Logging money into NGP – creating 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: **date, amount, contribution type, source** (a certain event, meeting, etc), **method** (check, credit card), che**ck number, account,** and then **“Tally Members”** to give Members and the Midwest region credit for raising the contribution.

Vetting process for contributions of $5,000 or greater:

1. In an email, include full name, address, employer/occupation, amount contributed, and NPG Contact ID.
2. Pull the most recent giving history from Political Moneyline.
3. The Finance Operations Director will notify you of who these emails should be sent to. You should also copy the Midwest Finance Director.

*Vetting Notes:* All White House vetting supersedes DCCC vetting. So, if a donor is vetted by The White House either to attend an event or to host an event, then there is no need to send their information to DCCC vetting. You should, however, write in the notes section of the transmittal, if the donor was sent to White House vetting and what the conclusion was.

**Donor Maintenance**

For a variety of events, occasions, and as “thank you” gifts, we send white orchids from Leader Pelosi.

Orchids are ordered through <http://www.teleflora.com>. The standard order is a white “Opulent Orchid.” You will set up your own log-in and use the MW Finance Director’s credit card to process the payment. It is easiest to save the credit card information in your Teleflora account. Once you have created an account, you will be able to access receipts and other information from previous orders. Make sure to confirm details of the order with the MW Finance Director.

Each order has specific language. For orders from Leader Pelosi, each message closes with: “Best, Nancy Pelosi” You should check with the Midwest Finance Director and the National Finance Director, as well as Missy, Deputy Executive Director, on the appropriate message for each orchid. The most commonly used messages are written below. Of course, at times, you will need more specific language.

After sending gifts, you should record it in the Donor Maintenance Spreadsheet in the Midwest Finance Drive. This is a new tracking spreadsheet that was created this cycle. You should also consider including any non-DCCC events that Leader Pelosi attends at the request of or with a donor. This is helpful to reference back to when making briefings and call sheets.

*Message Text:*

**Thank You:** “Thank you for your continued friendship and support and for hosting us in your lovely home. Best, Nancy Pelosi”

**Illness/surgery:** “Wishing you the best of luck for a quick recovery. My thoughts are with you. Best, Nancy Pelosi”

**Condolences:** “My most sincere sympathies and condolences for your loss. Keeping you and all your family in our prayers. Best, Nancy Pelosi”

**Birth:** “Congratulations on the newest addition to the family. Happy to hear Mary was born healthy and happy. Best, Nancy Pelosi”

**Birthday:** “Dear Ann, Best wishes on your birthday! Thank you for your friendship and support. Best, Nancy Pelosi”

**Thank You Notes**

Each regional assistant is responsible for sending thank you notes for contributions they have received. Thank you notes should be sent in a timely manner, either bi-weekly or monthly.

*Thank You Note Process:*

1. Pull the updated list from NGP. Search for all contributions that are tallied to the Midwest region within the specified date range. Make sure to Household the list and mark Thank You sent in NGP. You will be able to tell when the last batch of thank you notes were sent based on the latest dates in the Midwest Finance Drive. You can find past thank you note pulls in the MW Finance Drive. You should also keep a column in your Money In spreadsheet for TY (Thank you sent) to mark as you send thank you notes, as well.
2. After tallying how many letters to send, make sure the materials are available. Use “Nancy Pelosi, Democratic Leader” letterhead. **Make sure it is the letterhead that says “Paid for by the Democratic Congressional Campaign Committee” at the bottom.** Also use the envelopes with the DCCC return address.
3. 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.
4. Mail merge the exported list onto the letters and make sure that they are properly formatted for the letters.
5. Mail merge the address info onto labels for the envelopes. The labels and letters are easily printed from Wright or Garner. When you have a large batch of letters to print, you will want to use Speaker.
6. Stuff the letters; leave the envelopes unsealed and nested in one another. Then, feed the envelopes through the mailer machine. The mailer machine should be marked for our department (606), and choose to have “sealer on.”

**Talking Point Requests**

Anytime you have an event that involves Leader Pelosi or Chairman Luján, you need to request talking points for the event. Leader Pelosi and Chairman Luján will always need talking points at events. On some occasions, other Members of Congress will need Talking Points as well. You should follow the same format outlined below for them, as well. This should be done approximately two weeks before the event. This gives the DCCC Staff Writer enough time to draft the talking points, and it 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 she can write in acknowledgements, as well as the issues of interest to the audience. You can find past Talking Point Request forms in the Midwest Finance Drive in the different event folders.

**Long Term Updates**

The Finance Operations Director keeps track of Leader Pelosi’s Long Term Schedule. This document should never leave the Director’s area for an extended period of time, as it is a security risk for Leader Pelosi should that information be released. It is important to check the Long Term Schedule regularly for accuracy and to make sure that all event details are accurately reflected. You should send updates as changes occur, such as new Member RSVP’s, location change, etc. **Changes should be indicated in red.** Send this update in an email to the Finance Operations Director and copy the MW Finance Director, National Finance Director, and Missy. The format is below. **Each email should include the entire form, even if only one item has changed.** I found it easiest to copy/paste the last Long Term Update I sent for an event and make changes from that. That way, all of the details for the Long Term are consistent and uniform.

Date

Event Title

Event Run Time: Start - Finish

Location

Details

Attendees: # of attendees/ MOC or VIPs

Staff: DCCC Staff, (555) 555-5555 (c)

Site Contact: Name, (555) 555-5555 (w)

Confirmed?

**Call Sheets**

Call Sheets should provide a clear and accurate summary of donor information and giving history. We generate them in Microsoft Word and provide them on a regular basis for Leader Pelosi, Chairman Luján, and Members. Call Sheets for Leader Pelosi will go through an editing process before being sent up. There are thousands of examples in the Finance Drive. There are five main portions of a call sheet.

1. *Contact Information*: Make sure you have accurate contact information for each call sheet. This includes all possible phone numbers for the individual. **For Leader Pelosi and Chairman Luján, you will need to verify this by calling each number before it is sent for approval.** Often times, you can use SlyDial (267-759-3425) to confirm a personal cell phone.
2. *Ask:* This will have the main “ask” for the call. The call could be for a renewal, end-of-quarter ask, or an event invite. Confirm the ask with your Director.
3. *Background/Notes*: This provides context on the relationship between the person and the DCCC and the principal. Here, you will add information regarding how long they have been engaged with the DCCC, which events they have attended, and if/when Leader Pelosi or the Member has met them before. You will also add in all DCCC giving history in this section, and you’ll note whether the person attended a specific event and the amount they contributed. These notes should be in chronological order.
4. *Biography:* Make sure the information is accurate and relevant. Depending on who you are calling, you may want to include/exclude certain information to tailor to the principal calling.
5. *Giving History:* Other than confirmed contact information, this is the most important aspect of the call sheet. Export the individual’s giving history from Political MoneyLine. You will need to list giving history by year, largest to smallest. DCCC contributions should always be in bold. Any contributions related to the caller should also be in bold. *For example, if you’re preparing a call sheet for Leader Pelosi, and someone’s giving history included Nancy Pelosi for Congress or PAC to the Future, those contributions should be in bold.*

*Example of approved Call Sheet on next page:*

**Democratic Leader Nancy Pelosi**

 **DEMOCRATIC CONGRESSIONAL CAMPAIGN COMMITTEE**

 *Staff: Missy Kurek, (315) 373-9560 c*

**Name:** Jim Roush **Home Phone:** (425) 454-9005\*

**Spouse**: Cynthia Wayburn **Address:** Bellevue, WA

**James’s Employer**: Self **James’s Occupation:** Investor

**Cynthia’s Employer**: Self **Cynthia’s Occupation:** Conservationist

**ASK:** Please ask Cynthia and Jim to contribute $10,000 to the DCCC and join you and members of the Washington Delegation for a brunch in Seattle on Saturday, September 27th.

**Note:**

**November 2013:** Cynthia and Jim were unable to attend the DCCC Dinner with President Obama at the home of Jon Shirley. Jim conveyed to staff that they do not contribute to committees until the on-year, so to call them back in 2014.

**October 2010:** Jim and Cynthia contributed $10,000 to the DCCC through the Seattle Microsoft reception.

**October 2006:** Jim and Cynthia contributed $15,700 and $26,700, respectively, through a DCCC event with you in Seattle.

**September 2005:** They also contributed $5,000 to the DCCC in 2005 through a DCCC dinner.

**DCCC Brunch with you, Congressman Denny Heck, Congressman Rick Larsen, & Congressman Derek Kilmer**

**Saturday, September 27th, 2014**

**10:00 AM**

**The Washington Athletic Club**

**Seattle, WA**

**Host - $10,000 per couple**

**Sponsor - $5,000 per couple**

**Bio:** Jim Roush and Cynthia Wayburn are active in the philanthropic communities in both Aspen, CO and Seattle, WA. Jim is a retired investor and Cynthia is an active conservationist and currently serves as vice chair of the Earth Justice Legal Defense Fund.

Cynthia is the daughter of Edgar Wayburn and Peggy Elliott, two prominent Conservationists from San Francisco. She is the sister of Laurie Wayburn, Co-Founder, Co-CEO and President of the Pacific Forest Trust. Edgar died at the age of 103 at his home in San Francisco in March of 2010.

**Jim Roush’s Giving History:**

**2014** No Giving History

**2013** $1,500 Transportation Intermediaries Association'S Tiapac

**2012** $2,500 Elizabeth For Ma Inc

 $2,000 Delbene For Congress

 $1,400 Friends Of Chris Murphy

 $1,000 Montanans For Tester

 $1,000 Kaine For Virginia

 $1,000 Friends Of Sherrod Brown

 $1,000 Carmona For Arizona

 $500 McCaskill For Missouri

 $500 Duckworth For Congress

 $500 Denny Heck For Congress

 $200 Transportation Intermediaries Association'S Tiapac

**2011** $1,000 Transportation Intermediaries Association'S Tiapac

 $2,500 Friends Of Maria

 $250 Susan Bysiewicz For Connecticut Inc

**2010 $10,000 Democratic Congressional Campaign Committee**

 $5,000 PAC To The Future

 $2,400 People For Patty Murray

 $2,400 Markey For Congress

 $2,400 Friends Of Barbara Boxer

 $1,650 ActBlue

 $1,650 Blumenthal For Senate

 $1,000 Friends For Harry Reid

 $1,000 Robin Carnahan For Senate

 $1,000 McNerney For Congress

 $500 Friends Of Rosa Delauro

 $500 Blumenthal For Senate

 $500 Transportation Intermediaries Association'S Tiapac

**2009** **No Giving History**

**2008** $13,600 League of Conservation Voters Action Fund

 $4,600 Jeanne Shaheen for Senate

 $2,300 McNerney for Congress

 $2,000 Obama for America

 $2,000 Udall for US All

 $500 Democratic Senatorial Campaign Committee

**Cynthia Wayburn’s Giving History:**

**2014 No Giving History**

**2013** $2,600 Markey Committee; The

 $2,600 League Of Conservation Voters Action Fund

**2012** $18,000 League Of Conservation Voters Action Fund

 $2,500 Elizabeth For Ma Inc

 $2,500 Martin Heinrich For Senate

 $2,000 Delbene For Congress

 $1,000 Carmona For Arizona

 $1,000 Friends Of Chris Murphy

 $1,000 Friends Of Sherrod Brown

 $1,000 Kaine For Virginia

 $500 Denny Heck For Congress

 $500 Duckworth For Congress

 $500 McCaskill For Missouri

 $500 Montanans For Tester

 $500 People For Derek Kilmer

**2011** $19,600 League Of Conservation Voters Action Fund

 $5,000 PAC To The Future

 $3,000 Robin Carnahan For Senate

 $2,800 Bennet For Colorado

 $2,400 Citizens To Elect Rick Larsen

 $2,400 Friends Of Barbara Boxer

 $2,400 Markey For Congress

 $2,400 Martin Heinrich For Congress, Inc

 $1,000 Friends For Harry Reid

 $1,000 John Salazar For Congress

 $1,000 McNerney For Congress

 $250 Udall For Colorado

**2010 $10,000 Democratic Congressional Campaign Committee**

$2,000 Bennet For Colorado

**2009** No Giving History

**2008** $18,200 League of Conservation Voters Action Fund

**Prospecting Process**

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

Political MoneyLine is an online database of political contributions based on FEC filings and publicly 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 giving history as a way to gauge their capacity. MoneyLine is your best bet, because it provides most recent information. We also have an account with WealthEngine, which can be helpful in further determining a person’s giving history (especially if their giving history is more charitably focused rather than politically). WealthEngine also has information on connections and home addresses, as well.

Other places to look for new donors are host committees on invitations, boards of non-profit organizations and foundations, etc. There is a hard copy folder labeled “Research” that contains lists and articles that can be helpful to review for new ideas in the Midwest Finance Drive. I have also included prospecting lists used for multiple 2014 Midwest events in this folder.

**Events**

Every event begins differently. Some events are hosted annually and others are completely new. You will work with the MW Finance Director to ensure event hosts are happy, that they understand their raising obligations, and have realistic expectations about what the event entails. You will also assist in the following steps.

* **Filling out a scheduling request**
	+ When events are approved by Missy and the National Finance Director, you will need to fill out a scheduling request to be sent to Leader Pelosi’s official office. Examples of these can be found throughout the Midwest Finance Drive in different event folders. This should be done immediately to ensure the event is on the Leader’s schedule.
* **Requesting an event URL**
	+ You should request an event URL from the Finance Operations Director. This is the portal through which many of your donors will RSVP and contribute. The request to the Finance Operations Director should include all of the event information and contribution information. The event URL will also go on your invitation.
* **Creating an invite**
	+ There are tons of invite examples and different design ideas throughout the Finance drive. I often used invitations from the DC Region as templates for my own. Once you create the invitation, it will need to be approved by the MW Finance Director, National Finance Director, and Missy. It will then need to be approved by the Legal team (typically the Deputy COO and COO). If the invitation includes Members, you should send it to their respective offices for approval, as well.
* **Sending hosts through to vetting**
* **Targeting attendees (Prospecting)**
* **Sending invites by email, and when applicable, by ground mail**
* **Calling through invite lists and prospecting lists.** This will be one of your least favorite projects, but event calls are the most effective way to get in contact with potential donors and continue to produce RSVP’s. Sometimes, it will be helpful to call through your list twice.
* **Talking points requests**
* **Briefings for Leader Pelosi, Members of Congress in attendance, etc.**
* **RSVP Spreadsheet**

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. You should double check that you have all event materials about two weeks before the event. This gives you enough time to order additional supplies.

* Nametags
* Updated RSVP lists
* Pens and sharpies
* Extra Nametags
* Extra Nametag Holders
* Blank Card Stock
* Contribution Forms
* Problem Check Forms
* Table Tents
* Any specific literature the Leader or MOC’s request

*Quick pointers regarding Nametags:*

* Always print a name tag for the spouses of elected officials.
* If you have guests that aren’t from your region attending the event, have the regional director look over them for spelling and titles.
* Print nametags for people who have said they are tentatively coming or not coming at all. Surprises will happen frequently. **Be sure to have extras of everything at the event!**

*\*Events including the President, First Lady, or Vice President:*

For events with the President, First Lady, and/or Vice President, you will have to write a separate briefing for the principal. You will also organize and submit vetting for attendees. You will work with the MW Finance Director on these items. You will also need colored stickers for the nametags. These are used to differentiate between who is a part of the clutch, photoline, etc. Also, you will need ziplocs/baggies. At these events, you will take guests’s cell phones at the registration table, and they will need to be placed in individual bags.

*\*Events including Leader Pelosi:*

For events with Leader Pelosi, you will need to create a Main Briefing, an Attendee Briefing, and event cards. Copies of all of these items can be found in the Midwest Finance Drive. The Attendee Briefing will include two-liners on all event attendees – short biographical information and information on their giving history. An example of a two-liner is below. Event cards will need to be printed that have the event tic-toc, as well as a list of who is sitting at Leader Pelosi’s table. (*Note All 2013-2014 Speaker’s Cabinet members have the most recent two-liner saved in their NGP Record.)*

Events with Leader Pelosi should also include a Thank You Memo. The Thank You Memo lists any hosts and Members that the Leader will want to thank for their participation in the event. Once again, phone numbers for this memo should be verified, as you do for call sheets. Examples of Thank You Memos can be found throughout the Midwest Finance Drive event folders.

Two Liner Example *(This is one of the more extensive Midwest Two-liners, but gives you an idea of what information is pertinent):*

**Nazie Eftekhari, *Minneapolis, MN***

Nazie is the Founder, Chair and Chief Executive Officer of HealthEZ, Inc., a Minneapolis-based company providing services designed to streamline health care billing and payment. She is credited with creating America’s first Preferred Provider Organization (PPO). Nazie serves on the Board of Visitors of the University of Minnesota Medical School, and the Board of Overseers of the University of Minnesota Carlson School of Management. She is also on the board of the Iranian American-Political Action Committee. She is a graduate of the London School of Economics, the University of Southern California, and the University of Minnesota**. \**Please note: Nazie has been the DCCC’s largest raiser in Minnesota since 2009.******Nazie contributed $32,400 to the DCCC ($16,200 in May and $16,200 in June) for this event to complete her 2014 Speaker’s Cabinet commitment. Nazie also raised $32,400 from Beverly Grossman, who was unable to attend, for this event. Beverly and Nazie are both planning on attending your Napa Valley Issues Conference this August. She has been a member of your Speaker’s Cabinet since 2009. You last saw Nazie in December 2013, when she attended the DCCC Speaker’s Cabinet Holiday Luncheon. She sat at your table. You attended a DCCC reception and dinner at her home in October 2013. Nazie raised $146,000 for the DCCC for that event. You also saw Nazie when she was in town in July 2013 for a meeting in your office and at the Inauguration in 2013. She was with her son Sahm McGlynn (Sahm was a producer on Argo) and her daughter Raz McGlynn (a student at Sarah Lawrence College). Nazie hosted two DCCC events in the 2012 cycle: an event at her home in July 2011 and an event with Beverly Grossman in October 2012. She raised $150,000 for the DCCC in the 2012 cycle and contributed $61,600 personally.***

**Visa Processing**

The Midwest 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 should keep their credit card number on file and will regularly book travel, buy and send orchids, etc.

Each month, the accounting department will bring you a physical Visa spreadsheet, as well as an electronic Excel copy of the Director’s 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. Information on the source, account, and accounting-related codes can be found in the Forms\_Library Drive. When you complete the Director’s Visa, you will attach the receipts to the back of the physical spreadsheet. Each receipt should be taped to a piece of paper and numbered to correspond with the number on the spreadsheet. *I would suggest keeping a Visa folder in your Outlook Data File to store copies of hotel, flight, and other online purchase receipts that are emailed to you.* You should keep up with all receipts. I recommend going through receipts with the Director as soon as you receive your Visa spreadsheet. If a receipt is missing, this gives you time to recover it as hotels and other businesses can often be slow to fulfill your request for a copy. If you cannot track down a receipt, you will need to write a Missing Receipt Memo.

Accounting keeps track of what each department spends each 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 Visa folder on the Midwest Finance Drive to view previous complete credit card statements.

**FEEDBACK**

I began working as the Midwest Finance Assistant at the end of May 2014. Upon beginning the job, we had an event scheduled with the President within the next four weeks. Flexibility and adaptability are extremely important in this job. Being able to jump into a project immediately, as well as adapt quickly when the schedule or situation changes, is a valuable skill. And, it’s one that you will refine and further develop in this position. While the job is very fast paced, you should always feel like you can stop to ask questions. Of course, you should feel comfortable talking to the MW Finance Director, but you should also feel comfortable talking to and asking questions with the Senior Leadership.

Organization is key. I cannot stress how important it is that you’re organized and prepared. Along with this, I think it helps to keep an organized paper record. For example, updating the Donor Maintenance spreadsheet and emailing with Members’s schedulers, instead of just speaking over the phone. The “paper trail” not only helps if a question or concern ever arises, but it will also help you stay organized and make sure you accomplish all of your goals.

You should also make an effort to reach out and connect with people outside of the Finance Department. There are some great people who work at the DCCC. If you’re outgoing and friendly, they will be, too. And, you’ll make some great friends. Further, you’ll find the office is easier to maneuver and much more fun when you take the time to develop those relationships and to meet people.