**FROM: Amelie LeBreton, South Finance Director**

**DATE: November 21, 2014**

**SUBJECT: End of Cycle Memo**

**OVERVIEW**

The South Finance Director is responsible for all event management, unless delegated to the Assistant, training of the South Assistant and communicating with all Speaker’s Cabinet, etc donors throughout the year.

In total, the South region comprises: Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas and Virgin Islands. However, Texas and Florida are the most important states in the region as they generate the most money by far.

That said, it has become increasingly difficult to fundraise in Florida because of Debbie Wasserman Schultz’s new role as DNC Chairwoman. The DNC announced that Chairwoman Debbie Wasserman Schultz will serve in her role at the DNC for the 2014 cycle as well. In previous cycles, she was responsible for most of our fundraising in Florida. As a result of her new position, much of this money has stopped coming in. Chairman Israel is very focused on reversing this trend in Florida and is actively looking for creative ways to generate new money, new events and new raisers. Congressman Deutch is a valuable member that can be used to fill this void. At the end of the 2012 cycle, we have gained many new members in Florida and there will be many new ways to approach the South Florida and Orlando-area donor bases. This should be a priority for you.

Texas has been our most successful state this cycle. We have a number of great raisers throughout the state; specifically in Austin, Houston and Dallas. Most of our Texas money comes from the trial attorney community. Texas is also where our most helpful Members of Congress reside. With Congresswoman Debbie Wasserman Schultz serving as DNC Chairwoman, Florida has become increasingly competitive and we have had to build new networks and events.

Beyond Texas and Florida, the majority of the money raised for the Committee is brought in directly through a specific member. Members tend to have the relationships to raise money in these states that do not typically have a large number of Democratic donors. The greatest challenge in the Southern region is the large number of Republican states. Leader Pelosi, who does most of our travel for events in Texas and Florida, travels less frequently to other states in the region as she is not always the most lucrative draw. Typically she will only travel to these other, more republican states, to do DCCC fundraisers if she is asked directly by a Member of Congress, or if she is going to the city for another reason and we tack on a fundraising component to the trip.

Often when Leader Pelosi or other Members of Congress travel to the Southern region for a DCCC event or official business, we will work to set up prospect and donor meetings for them while they are there. These meetings, specifically with prospects, are especially important this cycle since. This is the case as we have seen a decrease in average money raised through events around the country now that we are in the minority. Scheduling meetings is a great way to tack on extra money on a swing, find new donors and turn DCCC givers into DCCC raisers.

**FINANCE PLAN**

The most recent regional finance plan is attached to this memo. Additionally, each year’s finance plan can be found in that year’s main folder, ie – S:\South\South 2013-2014\2014

**SOUTH EVENTS RECAP**

Over the years, the South has built many strong, annual events and most of the calendar will revolve around one or more of these events. These events have grown stronger each year as more donors become regular and reliable supporters of the relevant event. These events are our strongest source of funding and it is critical to keep the relationships with these hosts and networks for the success of this region.

In 2014, the South enjoyed events with President Obama in Miami, Houston and Dallas which were successful, especially in bringing new donors to the DCCC. However, these events either absorbed or altered the existing events in these cities. Moving forward, it will be important to reestablish the sustainable, annual nature of these events as seen in 2013.

**NOTE:** **Significant Members, raisers and max-out donors are covered throughout the Event recaps.** In addition to this memo, I kept a Rolling Calendar for each year since 2011 that will include every event, meeting, national event, etc – it was my tool for tracking the events information for the LT so you will find that information as well. Each year’s Rolling Calendar can be found in that year’s main folder, ie – S:\South\South 2013-2014\2014

**\*Also additional reference files in –**

**S:\South\South 2013-2014\Amelie\for Incoming South Director**

**2013**

**[Quarter 1]**

**Sunday, February 3, 2013**

**DCCC Speaker’s Cabinet Super Bowl Brunch hosted by Frances and Calvin Fayard**

**New Orleans, LA with Leader Pelosi**

EVENT RAISE: NA

S:\South\South 2013-2014\2013\Q1\02.03 Super Bowl NOLA Brunch

This event was a Speaker’s Cabinet appreciation event and did not raise new funds. Leader Pelosi’s hometowns of San Francisco and Baltimore were in the game and she wanted to have an event for donors in town. The hosts were Frances and Calvin Fayard, who the Leader has known for many years – particularly Frances through her involvement in Women of the Storm and Leader Pelosi’s post-Katrina leadership. Calvin and Frances are longtime large donors to the Democratic Party and gave large sums to Calvin’s daughter’s race for Lt. Governor. Despite many attempts, the Fayards have declined to become large donors to the DCCC through this event. Prior to 2013, the Fayards last significant support/interaction with the DCCC was in 2006 & 2007. During that time, they have remained larger supporters of the Senate, specifically Pryor and Landrieu. **This event was a special one-time circumstance. Any future events or trips to New Orleans, the Fayards should be at the top of any outreach lists but, again, have resisted any substantial commitments.\*See September 21, 2014: DCCC VIP Roundtable & Reception hosted by Congressman Cedric Richmond and Yulia & John Houghtaling in New Orleans.**

**[February 2013: Florida Swing]**

**Wednesday, February 20, 2013**

**DCCC Dinner hosted by Raysa and Alfy Fanjul and Congresswoman Lois Frankel with Leader Pelosi and Chairman Israel**

**Palm Beach, FL**

**EVENT RAISE: $140,000** (Event Goal: $100,000)

S:\South\South 2013-2014\2013\Q1\02.20 Frankel Florida

This was the first event Congresswoman Frankel hosted for the DCCC (as a freshman member). The event was a dinner with Leader Pelosi at the home of Raysa and Alfy Fanjul. Frankel secured the Fanjuls as co-hosts and their commitment to write/raise $60,000. The Fanjuls are longtime, very generous supporters of Leader Pelosi and the DCCC, typically maxing or raising $100,000 once or twice a cycle. However, they had lapsed in the 2011-2012 cycle and Frankel was successful in engaging them on her own. Because of the Fanjuls longtime support, Leader Pelosi pushed Congresswoman Frankel to exceed her original goal of $100K and she was very successful, raising $140,000 for the DCCC. Congresswoman Frankel was responsible for raising all of the commits but will expect lots of assistance with call recommendations and prospect targets. DCCC should offer and expect to call through the invite list as well. **Congresswoman Frankel should be asked to host an event and raise at least $100K each year. It is likely best to schedule early in the year but Florida travel tends to vary. She secured a co-host in both 2013 and 2014 but the co-host is expected to vary.**

\*NOTE: South Florida Members – Our most active members in South Florida are Deutch (Boca Raton) and Frankel (Palm Beach). These two members should host separate events but you will always need to balance asks made or planned to be made of Frankel and Deutch as they share and compete for various donors. Their districts and networks are distinct enough that they can raise separate money – You should review their past DCCC tally credit & event spreadsheets carefully to ID repetitive donors, etc, as many of the larger dem donors give support both campaigns. Specific Donor Notes – Carol & Irv Smokler: Irv personally asked that Deutch receive credit for his contributions. Frankel is aware of this but will always try to solicit him. Henry & Marsha Laufer (also in NY) are close with both Frankel & Deutch (as well as Pelosi, Israel, DWS, etc) so credit varies on case-by-case basis.

**Tuesday, February 19, 2013**

**DCCC Finance Meetings**

**Miami Beach, FL & Palm Beach, FL**

Leader Pelosi Meetings: Stephen Bittel and group; Barbara Stiefel; Joe Falk; *Elaine and Gerry Schuster (Northeast)*; Jamie & Bonnie Schaefer\* and group; and Danny Abraham

Chairman Israel Meetings: Shep Lane; and Michele and Howard Kessler, who canceled day-of.

\*NOTE: Jamie and Bonnie Schaefer –

Bonnie Schaefer and her partner Jamie are big donors with strong ties to Chairwoman Debbie Wasserman Schultz. Bonnie and her sister Marla own the Claire’s franchise and have been longtime prospects for DCCC. During the February 2013 trip, we were finally able to schedule a meeting and Bonnie invited Leader Pelosi to lunch on her yacht with Marla Schaefer and Steve Weishoff, Judy and Michael Adler and Ruth Selling. (Judy & Michael Adler are good friends and often donate with Sabine and Stephen Bittel – all of whom are very close with DWS). The Schaefers have huge capacity and were eager to meet again in 2014 but scheduling never worked out as they split their time between NC and FL. **The Schaefers could have the capacity and potential to be a big asset in South Florida. They have strong relationships in the Jewish community there and possibly the LGBT community. Given their existing commitments and ties to DWS, they will likely shy from being asked to host a full event and raise the standard $100K. I suggest asking them to arrange smaller, personal gatherings to introduce NP to their network – anything from prospective meetings to asking for $5-10K or potentially all max-outs.**

\*NOTE: South Florida Meetings – We have varied success with meetings in South Florida as it is very competitive, specifically with DWS. I suggest trying to look outside of DNC filings as they are largely DWS network which is very loyal. Barbara Stiefel was a fantastic meeting but travels often. If this swing is in conjunction with or advance of a Deutch or Frankel event, offering them meeting time for prospects etc is highly recommended.

\*Michele and Howard Kesslers are donors in FL & NY so you will work with the NE Regional on their outreach. The Kesslers are very close with former Chairman Israel but canceled almost every meeting scheduled in the 2012 & 2014 cycle. They also have a relationship with NP but have burnt a lot of time while giving little.

\*Elaine & Gerry Schuster live in Palm Beach and MA. Especially in the off-year, Leader Pelosi has met with the Schusters in Palm Beach to ask them to host an event in MA later that year. This is all done through the NE Regional but they are VIP donors so I’m including here as FYI.

**[February 2013: Texas Swing]**

**Thursday, February 21, 2013 & Friday, February 22, 2013**

**DCCC Finance Meetings with Leader Pelosi**

**Houston, TX**

Meetings: Amber & Steve Mostyn; Carl Gordon; Carrin Patman; Fred Hagans; Jason Freeman and group; and Tommy Fibich, who canceled day-of due to a knee injury.

\*NOTE: Houston Meetings – We have had many successful Houston meeting days and I recommend looking back through the rolling calendars and meeting outreach lists. We have had at least 2 to 3 trips to Houston over the past two cycles and almost always have a day or so worth of meeting time. Leader Pelosi’s daughter, Jacqueline Kenneally, lives in Houston so she often extends her time to see them.

From the list above – For the Mostyns, you should defer to Missy if a meeting is needed/wanted. Fred Hagans should be a priority meeting as he does not attend events but will max every year through a meeting. Tommy Fibich began by giving through events and had become loyal supporter and max-out. In late 2013, his granddaughter who was disabled all her life became very ill and eventually passed away and since then we have not solicited Tommy. Carl Gordon should not be a meeting moving forward as he will want to give in increments to attend as many special events as possible. Carrin Patman has become an event host and often gives in increments – she is not a priority meeting but worthwhile. (\*Carrin has been back and forth from Houston to Boston for the Harvard Exec program.)

**Saturday, February 23, 2013**

**DCCC Lunch hosted by Congressman Joaquín Castro & Henry Muñoz with Leader Pelosi**

**San Antonio, TX**

**EVENT RAISE: $114,000** (Event Goal: $100,000)

S:\South\South 2013-2014\2013\Q1\02.23a Castro-San Antonio

This is an annual event with Leader Pelosi and was the first DCCC event Congressman Castro has hosted as a member of Congress. (NOTE: Castro co-hosted this annual event in 2012 as a “Majority Maker” with retiring Rep. Charlie Gonzalez.) Castro secured Henry Muñoz to host the event at his home early in the year – prior to Henry being named DNC Finance Chairman. Henry only raised approximately $15,000 toward the event, mostly due to his conflicting commitment to the DNC. In the future, without such a conflict, Henry would be an ideal co-host for Castro’s event. Congressman Castro was responsible for raising almost all of the other commits. Although his staff knows San Antonio donors better than anyone, they will expect thorough assistance with call recommendations and prospect targets. DCCC should offer and expect to call through the invite list as well. **Congressman Castro should be asked to host an event in San Antonio and raise at least $100K each year. This should be scheduled in conjunction with the Laredo event (see next), which happens during President’s Day weekend. This swing often also includes a Houston event and/or series of meetings.**

\*NOTE: Henry Muñoz – Henry has a national reputation, capable of raising from Hispanic & LGBT communities. As much as is possible, the DCCC should actively try reengage him and keep in touch. Also note – Henry went to school and has a second home in New Orleans.

**Saturday, February 23, 2013**

**DCCC Reception hosted by Congressman Henry Cuellar with Leader Pelosi**

**Laredo, TX**

**EVENT RAISE: $100,000**

S:\South\South 2013-2014\2013\Q1\02.23p Cuellar-Laredo

This is an annual event hosted by Congressman Cuellar with Leader Pelosi. This event is always scheduled during the weekend of the Laredo George Washington Birthday Celebration (President’s Day Weekend) at the La Posada Hotel. In the past, a separate VIP reception was scheduled but in both 2011 & 2012 they were later combined as one event. I strongly recommend keeping this event as one event and pushing back on returning to VIP/general format. This event should raise between $90,000 and $100,000 – the ask should always be $100,000 raise. In past years, the event has varied in its success. The most effective way to push towards the $100K is by frequently following up with his staff with a clear timeline of when commits and RSVPs are expected. They tend to be late in sending this information but staff follow-up will encourage them to start earlier and ensure commits are more firm. Congressman Cuellar is always responsible for raising all of the commits. DCCC should offer but not expect to call through the invite list as well. **Congressman Cuellar should be asked to host an event in Laredo and raise at least $100K each year during President’s Day weekend. This should be scheduled on the same day as the San Antonio event. This swing should also include a Houston event with the Turkish American Community (see Kemal Oksuz) and a series of meetings and/or an additional event.**

**Sunday, February 24, 2013**

**DCCC Dinner hosted by Kemal Oksuz and Congressman Henry Cuellar with Leader Pelosi**

**Houston, TX**

**EVENT RAISE: $100,000**

S:\South\South 2013-2014\2013\Q1\02.24 Cuellar-Kemal Dinner – Houston

This is an annual dinner event hosted by Kemal Oksuz and Congressman Henry Cuellar with Leader Pelosi at Kemal’s home in Houston. Kemal is the president of Turquoise Council of Americans and Eurasians and is very involved in the Turkish-American community. While Kemal has become more engaged with the DCCC since he first hosted in 2012, Kemal hosts and raises at this level at the request of Congressman Cuellar. Kemal will want Congressman Cuellar to receive credit for anything he raises so you should lean on Congressman Cuellar to work with Kemal. DCCC staff should ask the hosts and offer to invite the Houston area Members as well. Kemal raises all of the contributions and handles all outreach. You will make a PDF invite but he does not need any area lists, etc. Kemal is notoriously late and difficult about giving updates so again I recommend giving him a clear timeline and staying on up him. **We should ask Congressman Cuellar and Kemal to continue hosting/raising at this level. See March 16, 2014: DCCC Dinner hosted by Kemal Oksuz and Congressman Henry Cuellar – for future recommendations.**

**[April 2013: Texas Trip #2]**

**Tuesday, April 30, 2013**

**DCCC Finance Meetings with Leader Pelosi**

**Houston, TX**

Meetings: Michael Gamson; Nancy McGregor Manne and Neal Manne; Mayor Bill White; Walter Umphrey, who had to cancel day-of.

\*NOTE: Houston Meetings – Michael Gamson is becoming a loyal supporter and should be a meeting to keep his max support engaged. Nancy McGregor Manne and Neal Manne have great capacity but are very reluctant to give in large sums – Carrin Patman helped encourage them to meet and we should pursue them through her events in the future. Mayor Bill White is not likely to max as he likes to give candidate money – best to ask for 50/50 split. Walter Umphrey is a trial attorney and friend and attorney USW President Leo Gerard – see December 4, 2013:

DCCC Dinner hosted by USW President Leo Gerard and Walter Umphrey in Washington, DC.

**Tuesday, April 30, 2013**

**DCCC Dinner hosted by Amber and Steve Mostyn and Ellen and Steve Susman with Leader Pelosi**

**Houston, TX**

**EVENT RAISE: $187,000**

S:\South\South 2013-2014\2013\Q2\04.30 Mostyn-Susman – Houston

Amber and Steve Mostyn are close, loyal friends of Leader Pelosi and are our biggest raisers in Houston. This was an annual dinner with Leader Pelosi hosted by Amber and Steve at their home and the Mostyns will have a theme in mind for the event. In 2013, this event was co-hosted by Ellen and Steve Susman. Ellen was very eager to host an event and their networks overlapped enough that we decided it was best to have them co-host. In the past few cycles, the Mostyns have hosted at least one, sometimes two events a year at their home in Houston. Steve Mostyn raises most of the money for these events, but you should not leave everything up to him. There is a lot of money in Houston, so you should go about raising like you would in a city without a good raiser/host. In the past, Steve has usually come through at the very end with some big commitments that will bump up the numbers significantly. However in 2012, we raised a majority of the large checks in January toward the event from the many loyal, annual donors who have given through this event in the past. (Note: Steve and Dave Matthiesen, a past host/raiser in Houston, are not on great terms – Dave will likely not attend Steve’s event and vice versa.) **Amber and Steve should be asked to host an event and raise $150-200K each year, to include an ask for a maximum contribution from each. You will work with their political/events consultant, Lillie Schechter. Lillie can be resistant to committing to the events. Missy Kurek has a very strong relationship with both Amber and Steve and can help push the ask along. I also recommend trying to schedule this event in Q1 – The Mostyns are very involved in the State Legislature and the typical mid-Q2 Texas swing tends to conflict with Leg session which can cause the event to underperform.**

**NOTE: Since this time, Ellen was appointed to head the Arts in the Embassies program within the State Department. As a result, Ellen says she is unable to give or participate in fundraising as an Administration appointee. While Ellen was always more engaged, Steve Susman continues to give but is likely to want to give through AAJ’s annual raise.**

\*NOTE: Houston Members – There are three Houston area Members: Al Green, Gene Green & Sheila Jackson Lee. All three should be invited to any Houston events, after checking with hosts as always. Congressman Gene Green has 1 large donor, Eric Carter, who has given in the $10K to max-out range but did not give in 2013 or 2014. Congressman Al Green will make calls if asked but is a weak fundraiser. Congresswoman Sheila Jackson Lee varies in her participation but should always be asked to do something (See: March 2014). All three should always be asked for Member Dues when being invited.

**[Dallas & Ft. Worth]**

**Wednesday, May 1, 2013**

**DCCC Lunch hosted by Congressman Marc Veasey and co-hosts Hon. Martin Frost and Hon. Jim Wright with Leader Pelosi**

**Fort Worth, TX**

**EVENT RAISE: $100,000**

S:\South\South 2013-2014\2013\Q2\05.01a Veasey - Ft Worth

This was the first DCCC event Congressman Veasey has hosted as a member of Congress. (NOTE: Veasey co-hosted a small event in October 2012 as a “Majority Maker” with Whip Hoyer in Ft. Worth.) The event was a luncheon with Leader Pelosi. Veasey secured co-hosts but for the purpose of lending their names and were not asked to raise a large amount. Congressman Veasey was very successful bringing in many new donors at the $5K level and securing a new (and now very loyal) Speaker’s Cabinet donor, Ruel Hamilton. He also raised a max-out from David Alameel through a meeting immediately prior to the event. (Veasey later raised an additional max-out from Martha Alameel later that summer.) Congressman Veasey was responsible for raising almost all of the other commits. They will expect/need thorough assistance with call recommendations and prospect targets. DCCC should offer and expect to call through the invite list as well. **Congressman Veasey should be asked to host an event in Ft. Worth and raise at least $100K each year. This can be/ will likely be scheduled in conjunction with a Dallas event hosted by Marc Stanley and Marc typically prefers to host in Q2. \*NOTE: Stanley and Veasey get along very well and are longtime friends/supporters. However, there is some competition for credit, specifically for the Brenders – they tend to renew in January, were first brought in by Stanley but will tell Veasey he should receive credit – Both Veasey and Stanley understand credit and you should be upfront with which event will be credited with what and compromise to keep both motivated and happy.**

**Wednesday, May 1, 2013**

**DCCC Dinner hosted by Lisa Blue Baron, Lynda and Art Brender, Joan and Terry Oxford, Dr. Geetha and Paul Pandian, Dara and Jeff Tillotson and Wendy and Marc Stanley with Leader Pelosi**

**Dallas, TX**

**EVENT RAISE: $146,000**

S:\South\South 2013-2014\2013\Q2\05.01p Stanley – Dallas

This is an annual dinner with Leader Pelosi hosted by Marc and Wendy Stanley. The Stanley’s event historically is pretty similar to the Houston event hosted by Steve Mostyn. Marc will do a lot of the fundraising, but you still need to be very involved, call through lists, send NP emails, etc. Over the past few years, Marc has recruited a host committee and secured someone else to host – in 2013, Joan and Terry Oxford hosted and in 2012, Veronica Roth & Dick Sayles – with the goal that that couple will help carry some of the raise. The host committee members vary a bit year-to-year and how much they raise, etc. Marc will want to review Dallas area lists and have a conference call – I highly suggest you help arrange and participate in this call. Marc will always want the Leader to make a few calls for this event. You should ask him who his targets are early on – he will typically suggest regulars first and then you should encourage him to use NP calls for new or harder targets as he will have better/more appropriate targets. **Marc has been hosting/raising for NP/DCCC for years. He is one of our very best raisers and is very familiar with how we operate, including internal/event/member credit. There are two events with overlapping donors that create conflicts for credit – Veasey (see above) and AAJ. A lot of the money raised for this event is from the trial attorney community. Marc is an attorney and has very strong relationships with many key trial attorneys in Dallas, specifically Lisa Blue Baron (\*see note below). There are some donors that automatically fall into one event or the other – the Oxfords are in AAJ but always give through Marc; Lisa Blue Baron was often shared credit but then became an AAJ officer and was exclusively AAJ credit. As with the conflicts with Veasey, you should be upfront with which event will be credited with what and compromise to keep both motivated and happy. You should be in touch with your contact at AAJ during this event as well to discuss overlaps etc as well.**

**Wednesday, May 1, 2013**

**DCCC Finance Meetings with Leader Pelosi**

**Dallas, TX**

Meeting: DJ & Les Weisbrod and Elba & Domingo Garcia – DJ & Les Weisbrod are longtime maxers from Dallas and very active with AAJ. Elba & Domingo Garcia are also longtime maxers from Dallas but not involved with AAJ. Both couples should receive the invite for Marc’s event but should not be pushed through his event. The Weisbrods and Garcias will want a meeting with Leader Pelosi separately – they often do this meeting together. **You should always try to schedule this meeting during this trip as we don’t tend to make multiple trips to Dallas. The Weisbrods and especially the Garcias will not give without the meeting.**

\*NOTE: Congresswoman Eddie Bernice Johnson – Congresswoman Eddie Bernice Johnson should be invited to Marc’s event but does not raise through Marc’s often wants to arrange her own event. \*Note that Marc disagrees with EBJ on many issues but will agree to have us extend an invite. EBJ will often want to make a full day’s schedule of events but does not have a great track record of raising enough and should be pushed to a single event, if any. Additionally, Johnson has been friends with Les Weisbrod since high school and should be credited with Weisbrod’s contributions. In 2012, Domingo Garcia ran for Congress against now Congressman Marc Veasey. EBJ endorsed Veasey and since then, we avoid EBJ participating in meetings with the Garcias.

**[Q3 – July 2013: AAJ in San Francisco]**

**Saturday, July 20, 2013**

**DCCC Reception hosted by members of the Trial Attorney community with Leader Pelosi**

**San Francisco, CA**

**EVENT/ANNUAL RAISE: $356,650**

This is an annual DCCC event that is hosted by members of the trial attorney community. **AAJ’s raise is the largest source of contributions for the South Region by far and away.** Linda Lipsen, who is CEO of the American Association for Justice, usually organizes the event around AAJ’s annual conferences. For this reason, the location varies and money comes in from around the country. Linda and the AAJ Officers and Executive Board raise all of the money for this event. As the event is typically in late July, their raise is an ongoing process throughout the year it is important to be in touch with AAJ about any of their donors, targets or overlapping targets.

As noted in the Marc Stanley Dallas event, there will always be overlap between AAJ’s raise and other DCCC events. Each year, their board will agree to the annual raise commit for the DCCC and many other groups. In each of the last AAJ spreadsheets, you will see a raise column that shows you which board members, etc are raising and their networks. Once they reach the goal, they will stop pushing asks for the DCCC and their assistance pushing outstanding commits will vary. For all of these reasons – it is very important to be conscious of what overlap credit is allowed toward this raise. You will see an “Additional Raise” tab in this spreadsheet – this was used as a way to give AAJ credit for contributions from donors in AAJ’s network that were clearly raised by/for something else, without subtracting from their raise goal. In 2013, the raise total was $356,650 with an “Additional Raise” of $150,000. This allowed us to keep AAJ’s board pushing more asks and allowed our counterpart at AAJ to include these overlap contributions and report the total to AAJ’s board as $506,650 – This was one of the most successful AAJ events in years. In 2014, the raise was an exception most recent years and the Additional Raise tool was not used. I highly recommend bringing this back as much as possible. **This event will likely be scheduled in late July during their annual Summer Conference (they have many large meetings). That said, you should reach out to AAJ in January to introduce yourself, begin to inquire on their plans for the year, etc, and keep in touch regularly. Developing a strong relationship with AAJ is critical.**

**[Napa Valley Weekend: August 16-18]**

**Friday, August 16, 2013**

**DCCC Luncheon hosted by Norman Estes with Leader Pelosi**

**Rutherford, CA**

**EVENT GOAL: $79,900; Annual Raise Total: $115,000**

[Event] S:\South\South 2013-2014\2013\Q3\08.16 Estes - Napa Lunch

[Annual Raise] S:\South\South 2013-2014\2013\Lists\ESTES RAISE

This is an annual luncheon hosted by Norman Estes with Leader Pelosi on the Friday of the Napa Weekend. For the past several years, Norman has committed to raising $150K-$200K for the DCCC (combination of individual and PAC) through 2-3 events with Leader Pelosi. In 2013, Norman was named the chair of AHCA’s PAC. While AHCA had been involved in this raise, the commitment is now formally from Norman and AHCA. This change took place in the spring of 2013 which delayed the typical plan to schedule a first event in June in Washington, DC. We had planned to schedule a second event in the Fall in DC but scheduling fell through and they completed the raise in November & December, with two checks arriving in January. Their commitment includes a NP4C & PTF component. You will need to work with the NP4C/PTF Director to decide what amount should be asked. Be sure these commit amounts are clearly confirmed – **Once the commit is locked in, they do not change much and definitely don’t want to increase. That said, the individual events are very easy because Norman’s political director, Brandon Farmer, and Jennifer Hahs at AHCA do all of the raising. They are notoriously late with RSVP & commit information so checking in regularly is important. Much of the money raised through this event is from the PAC community. Over the last few years, we have been pushing for more individual money than PAC and that the events be better attended and utilized. This is a work in progress.**

**[August 2013: Texas Round 3]**

**Sunday, August 25, 2013**

**DCCC Brunch hosted by Carrin Patman with Leader Pelosi**

**Houston, TX**

**EVENT RAISE: $82,200**

S:\South\South 2013-2014\2013\Q3\08.25a Carrin Patman – Houston

This was a reception-style brunch hosted by Carrin Patman with Leader Pelosi at Carrin’s home in Houston. This was the second event she hosted. The first was in August 2012. Both years, she asked other women to co-host but did not call it a “womens reception” to keep attendance open. She has a phenomenal network of women with large capacity to give, including Phyllis Cohen, Lillie Robertson and Sara Morgan, and has a large capacity to raise. **Her events have brought in many new donors and several have grown to be larger donors. It would be best for Leader Pelosi to call or meet with Carrin early in the cycle and be asked to join Speaker’s Cabinet and host/raise for the DCCC. Carrin is a great prospective raiser for the DCCC and we should try to develop an annual event with her. Beginning in 2014, Carrin has been in Boston with the Harvard Executive program so her involvement lessened. Once she is back from Boston, we should arrange some NP outreach to reengage and secure her support. Additionally, it is important to schedule the Mostyn event and Carrin’s event at strategic intervals – in both 2012 & 2013, Mostyns was in early Q2 and Carrin was in August. Although the summer can be difficult in Texas, we have had many very successful events in late August, when school has started again. Early September may be ideal but tends to be in high-demand nationally.**

**Sunday, August 25, 2013**

**DCCC Finance Reception hosted by Hon. Ben Barnes and Eve Marie & Jeff Angelovich with Leader Pelosi & DCCC Finance Dinner hosted by Hon. Ben Barnes with Leader Pelosi**

**Austin, TX**

**EVENT RAISE: $259,000**

S:\South\South 2013-2014\2013\Q3\08.25p Barnes-Austin

Ben Barnes is a longtime friend and supporter of Leader Pelosi and has been our only raiser in Austin. Ben does not host/raise through any annual, repeating event but will host about once a cycle and always aims to raise a large amount. In 2012 & 2013, Ben secured a co-host to help with the raising. In 2013, he reached out to Cary Patterson’s firm, Nix Patterson Roach, and they secured a partner in Austin, Jeff Angelovich. Ultimately, Jeff was an incredibly effective co-host for Ben. Ben likes to focus on bigger targets and worked on several new max-outs and secured max-out support from the name partners. Meanwhile, Jeff raised many $5K and $10K contributions from the more junior partners in their firm. This combination made the event incredibly successful. **In the future, Jeff would not likely host/raise unless asked by his firm. That said, I highly recommend repeating this formula as much as is possible. Your contact will be Ben’s Political Director, Wyeth Weidman, who has worked for Ben for many years and is close friends with Missy – Wyeth is a favorite and knows our process very well. Any and all asks of Ben should be vetted through Wyeth and then formally made by Leader Pelosi directly to Ben.**

**NOTE**: In 2014, we asked Ben to host/raise again. He agreed and secured co-hosts Laetitia & Richard Garriott de Cayeux. The Garriotts are longtime max-out prospects but new to hosting/raising with have homes in Austin and NYC. They wanted to host in NYC which meant the raise would come entirely from the Garriotts NYC and professional network. In setting up this event, Ben wanted to make the entire event a sit-down dinner, max-out per couple event – this is a formula he often proposes. This was scheduled for October 26th. A week prior to the event, the Garriotts asked to reschedule as they weren’t getting the response they’d hoped for. They are still interested in hosting and Ben expects to have this rescheduled for 2015. **Assuming we can address the raise concerns mentioned here, we should pursue this commitment as it promises to bring a whole new network of donors to the DCCC.**

**Sunday, August 25, 2013**

**DCCC Finance Meeting with Leader Pelosi**

**Austin, TX**

Meeting: Dave Glassco – Dave is our most frequent meeting in Austin but has resisted giving a full max-out, giving $15K in December 2013 and waiting until July 2014 to give the remaining. Overall, Austin meetings have not been consistent or very responsive.

**[September 2013: Tampa & Puerto Rico]**

**Monday, September 23, 2013**

**DCCC Reception hosted by Congresswoman Kathy Castor and Toni Thompson & Dave Amis with Leader Pelosi**

**Tampa, FL**

**EVENT RAISE: $140,000**

S:\South\South 2013-2014\2013\Q3\09.23 Castor-Tampa & Meetings

This was a reception hosted by Congresswoman Kathy Castor with Leader Pelosi. Castor has a mixed track record with hosting/raising but this event was incredibly successful. Despite having a majority of lower dollar contributions, she outraised her goal of $100K by $40K. Castor made a huge number of calls – some targets we provided, but mostly from her own network. Castor also tried to secure several more high-dollar folks to co-host but ultimately, the Amis agreed. The Amis were incredibly excited and did reach out to their lower-dollar network which helped the raise. However, they never reported who they’d raised so it is unknown who helpful they were. There were 80+ people at the event which was much larger than expected. Most importantly, there was a great response to meeting Leader Pelosi especially among Castor’s female donors, though again majority were low-dollar. As we have not had consistent events or strong relationships in Tampa, we are dependent on a strong Member host there. **For these reasons, we very much wanted Castor to make this an annual event. In 2014, we made several asks for Castor to host again event in Q3 but Castor resisted for a variety of reasons. It should be noted that there were political factors – At the times these asks were being made, there was a competitive special election in the neighboring district in which Alex Sink ran and raised a lot of money in Tampa. Sink lost and declined to run again for the seat in November and we were unsuccessful in recruiting a new candidate. Ultimately, Castor declined to host during that time due to donor fatigue and frustration.**

**Tuesday, September 24, 2013**

**DCCC Reception hosted by Maria Elena & Congressman Pedro Pierluisi and Cary Pierluisi & Andy Guillemard with Leader Pelosi**

**Miramar, PR**

**EVENT RAISE: $78,602**

S:\South\South 2013-2014\2013\Q3\09.24 Pierluisi - San Juan

This is an annual event hosted by Congressman Pedro Pierluisi with Leader Pelosi in San Juan at the home of Cary Pierluisi and Andy Guillemard (Congressman’s sister and brother-in-law). You will communicate exclusively with Carmen Feliciano, Pierluisi’s COS, but Andy Guillemard is the key raiser in their group. In 2010 and 2011, these events raised approx. $150K. In 2012, the event raise goal was $100K because Andy was on the Obama Finance Committee and raised a large amount from their donor base for the President’s re-elect. In 2013, we hoped the raise would return to $150K raise without competition from the President’s re-elect involved, However, Pierluisi and Andy began pushing back on the raise goal, wanting to agree to only $75K. **See: October 18, 2014 DCCC Finance Reception hosted by Congressman Pedro Pierluisi – for future recommendations.**

**[Q4 – December 2013]**

**Wednesday, December 4, 2013**

**DCCC Dinner hosted by USW President Leo Gerard and Walter Umphrey with Leader Pelosi**

**Washington, DC**

**EVENT RAISE: $250,000**

S:\South\South 2013-2014\2013\Q4\12.04 USW-Umphrey Dinner

This is a repeating event, occurring approx. once a cycle raising between $200K-$250K. This was a dinner with USW President Leo Gerard and Walter Umphrey. Walter is the attorney for the United Steelworkers. All contributions for these events are raised by Walter Umphrey from attorneys at his law firm, Provost Umphrey in Beaumont, TX. These events have taken place in DC so the Beaumont attorneys giving typically do not attend these events. Attendees are typically from the USW community invited by Gerard. **Walter raises at this level specifically at the request of and in conjunction with President Gerard. To set this event up, it is best if Leader Pelosi calls Gerard first and then Walter (at which point she will likely be thanking Walter for having already committed through Gerard). That said, Walter has a close relationship with Leader Pelosi and will sometimes meet with her in Beaumont and give his personal money separate from these events. This event raises money that cannot be raised through other events/ networks.**

**2014**

**[February 2014: South Florida + Atlanta]**

**Tuesday, February 18, 2014**

**DCCC Finance Meetings with Leader Pelosi**

**Miami Beach, FL**

Meetings: Andrew Korge; Ben Pollara group & Rep. Deutch; and Andrew Weinstein & Rep. Deutch

\*NOTE: South Florida Meetings – Leader Pelosi’s trip was originally scheduled to include an event hosted by Congressman Deutch and Tracy & Alonzo Mourning. This was rescheduled as the March POTUS event. We used this time to meet with potential raisers for the POTUS event. While we hoped to engage this group of largely DNC associated raisers through our first POTUS event in South Florida since 2010, these meetings did not result in any substantial raise or contributions.

FYI – Leader Pelosi also attended these events which involved many DCCC donors:

Tuesday, February 18, 2014: HMP Dinner for Alex Sink hosted by Stephen Bittel

Wednesday, February 19, 2014: HMP Breakfast Meeting with Alfonso "Alfy" Fanjul – **This resulted in a DCCC commitment as well**.

**Wednesday, February 19, 2014**

**DCCC Reception hosted by Congresswoman Lois Frankel and Mei Sze and Jeff Greene**

**Palm Beach, FL**

**EVENT RAISE: $60,000**

S:\South\South 2013-2014\2014\Q1\02.19 Frankel - Palm Beach

This was the second event Congresswoman Frankel hosted for the DCCC (as a freshman member). The event was a dinner with Leader Pelosi at the home of Mei Sze Chan and Jeff Greene. The Greenes were not helpful raisers and eventually did not contribute the $5,000 Frankel had negotiated. This event’s goal was lowered to $75,000 because of the competition with our DCCC POTUS event as well as the DNC’s Roundtable scheduled for the same, heavily pushed by DWS, the following month. Frankel pushed aggressively for the event but with the number of competing events in February and March, this event did not perform as well as her first or as well as any future event should be expected to raise. **Congresswoman Frankel is an aggressive and effective raiser and should be asked to host an event and raise at least $100K each year. It is likely best to schedule early in the year but Florida travel tends to vary. She secured a co-host in both 2013 and 2014 but the co-host is expected to vary.**

**NOTE: You will always need to balance asks made of Frankel with asks planned/made of Congressman Deutch as they share and compete for various donors.**

**[February 2014: Atlanta]**

**Thursday, February 20, 2014**

**DCCC Luncheon hosted by Congressman John Lewis**

**Atlanta, GA**

**EVENT RAISE: $20,000** (EVENT GOAL: $50-75,000)

S:\South\South 2013-2014\2014\Q1\02.20 NP in ATL

This event was the first DCCC event in Atlanta since 2010 and the first DCCC event with Leader Pelosi in Atlanta for the DCCC since 2006. It was also the first DCCC event that Congressman Lewis had hosted in Atlanta since 2007. Congressman Lewis is not an aggressive fundraiser and his fundraiser, Kristin Oblander, a well-known fundraiser in Atlanta, was responsible for the majority of the outreach. This event was expected to struggle but we had continuously asked Lewis to host and raise hoping to build our relationships and develop an event or other revenue stream there. Unfortunately, in the weeks prior to the event, Atlanta experienced an historic snow storm during which most of the city lost power twice. This obviously made outreach and raising very difficult. Leader Pelosi was traveling Atlanta for official/press events as well so – to salvage the event, we added low-dollar levels and Kristin invited many good prospects to attend as Lewis’ guests. **While this did not build as much foundation as we’d hoped, we should continue to pursue Atlanta as much as possible as it is one of few wealthy cities in the region. Also, while Lewis is not a strong raiser, he is our strongest and possibly only entry into Atlanta.**

FYI – Thursday, February 20, 2014: HMP Finance Meeting with Anne Cox Chambers and Leader Pelosi – **This resulted in a DCCC commitment as well**.

**[March 2014: Texas Trip #1]**

**Saturday, March 15, 2014**

**DCCC Luncheon hosted by Congressman Joaquin Castro**

**San Antonio, TX**

**EVENT GOAL: $82,000**

S:\South\South 2013-2014\2014\Q1\03.15a Castro - San Antonio

This is an annual event with Leader Pelosi and was the second DCCC event Congressman Castro has hosted as a member of Congress. Congressman Castro was responsible for raising almost all of the other commits. Although his staff knows San Antonio donors better than anyone, they will expect thorough assistance with call recommendations and prospect targets. DCCC should offer and expect to call through the invite list as well. **Congressman Castro should be asked to host an event in San Antonio and raise at least $100K each year. \*In 2014, Castro’s team pushed back on the $100K raise ask and may need some leadership outreach to re-motivate and firm up his $100K annual raise – which is entirely doable for him. He should be encouraged to develop a max-out donor for the DCCC that he can go back to each year. This should be scheduled in conjunction with the Laredo event (see next), which typically happens during President’s Day weekend. This swing often also includes a Houston event and/or series of meetings.**

**Saturday, March 15, 2014**

**DCCC Reception hosted by Congressman Henry Cuellar**

**Laredo, TX**

**EVENT RAISE: $75,000**

S:\South\South 2013-2014\2014\Q1\03.15p Cuellar – Laredo

This is an annual event hosted by Congressman Cuellar with Leader Pelosi. This event has always scheduled during the weekend of the Laredo George Washington Birthday Celebration (President’s Day Weekend) at the La Posada Hotel. **In 2014, Congressman Cuellar was selected to portray George Washington during the celebrations therefore he asked to host this event at his home after the celebration events concluded. We expect future events to return to the President’s Day Weekend format.** This event should raise between $90,000 and $100,000 – the ask should always be $100,000 raise. In past years, the event has varied in its success. In 2014, Cuellar’s duties as George Washington were very time consuming and certain annual donors fell-off causing the event to come in low. (It is a citywide celebration that goes on for a month.) Assuming they return to the previous format, refer to the 2013 event for suggestions and notes. **Congressman Cuellar should be asked to host an event in Laredo and raise at least $100K each year during President’s Day weekend. This should be scheduled on the same day as the San Antonio event. This swing may also include a Houston event with the Turkish American Community (see Kemal Oksuz) and a series of meetings and/or an additional event.**

**Sunday, March 16, 2014**

**DCCC Dinner hosted by Kemal Oksuz and Congressman Henry Cuellar**

**Houston, TX**

**EVENT GOAL: $120,000**

S:\South\South 2013-2014\2014\Q1\03.16 Cuellar-Kemal in Houston

This is an annual dinner event hosted by Kemal Oksuz and Congressman Henry Cuellar with Leader Pelosi at Kemal’s home in Houston. This event was identical to the 2013 event. **We should ask Congressman Cuellar and Kemal to continue hosting/raising at this level. However, Kemal Oksuz and his family moved to Arlington, VA (as of December 1, 2014). Congressman Cuellar said Kemal was introducing him to Kemal’s successor in Houston. It is possible that Kemal will want to host this event in DC or arrange for this event to continue in Houston and Kemal will be otherwise engaged with the DCCC through DC. In any event, we should contact Cuellar and Kemal early in 2015 to discuss how/where this event will continue moving forward and secure this support on an annual basis.**

**Monday, March 17, 2014**

**DCCC Women’s Reception hosted by Congresswoman Sheila Jackson Lee, Carrin Patman and Joyce & Amb. Arthur Schechter**

**Houston, TX**

***\*EVENT RAISE: $110,000***

S:\South\South 2013-2014\2014\Q1\03.17 SJL Womens Event – Houston

This event was hosted by Congresswoman Sheila Jackson Lee. The event complemented a Women’s Press event and was proposed by the Member. SJL has not regularly hosted an event or been heavily involved in raising for existing Houston event – although she has been involved with other DCCC program/events. SJL’s team secured two co-hosts: Amb. Schechter, who hosted in his home, reached out to his network but did not raise a significant amount; and Carrin Patman who is an existing host separate from SJL but was not planning to host her event as she is in Boston for her Harvard program. **It is unknown if SJL will want to host an event regularly but I would warn against merging any future SJL events with Carrin’s events. If SJL does not want to host on her own, she should be encouraged to help raise into Carrin’s event as the women’s focus worked very well.** Additionally, after scheduling this event, the White House confirmed a POTUS event for a DCCC-DSCC joint event on April 9, 2014. To avoid competition/conflict, allowed overlapping event credit and ensured that SJL received credit for the full amount given the joint fund. Because of the POTUS event, we did not have our regular Mostyn event in Houston. **Assuming our Mostyn and Carrin Patman events continue as they did in 2012 & 2013, it will likely be difficult to add a third event in Houston (with the exception of specific group events like Kemal’s). Furthermore, SJL can be difficult and does not have a well-oiled fundraising operation so the consistency and communication needed to navigate the relationships and outreach may be hard to accomplish with SJL’s team. That said, SJL was highly effective and aggressive in securing commits and bringing them in the door. SJL had secured the help of a consultant Duni Hebron for both the fundraiser and press event, which was very large. Duni can be difficult to communicate with as well but in the end she was instrumental in securing the commits and made a very successful event.**

\*POTUS NOTE: Although we offered the same arrangement to both, the POTUS event definitely increased SJL’s event raise while it lessened Frankel’s Palm Beach event raise. This is partially due to added competition of DWS’s POTUS roundtable. We were also likely better at communicating and facilitating the situation.

**Monday, March 17, 2014 & Tuesday, March 18, 2014**

**DCCC Finance Meetings with Leader Pelosi**

**Houston, TX**

Meetings: Michael Gamson; and Jim Postl

\*NOTE: Houston Meetings – Michael Gamson is becoming a loyal supporter and should be a meeting to keep his max support engaged. We have arranged several meetings with Jim Postl and he has declined to give at a higher level. He should be priority event target for $5K-$10K but is likely not worth another meeting.

**[March 2014: Miami POTUS]**

**Thursday, March 20, 2014**

**DCCC Dinner with President Barack Obama at the home of Tracy and Alonzo Mourning**

**Miami, FL**

**EVENT RAISE: $585,600**

S:\South\South 2013-2014\2014\Q1\03.20 POTUS-MIAMI

This was the first DCCC event in South Florida with President Obama since 2010. Congressman Deutch had secured Tracy & Alonzo Mourning, who had hosted our past POTUS events, to host a regular DCCC event in February. A few days later, we received the March date for the POTUS event and “rescheduled” the Mournings to host POTUS. Since Deutch had secured the host, he took on a larger raising role for the event and was treated as a co-host of the event. Additionally, Reps. Frankel & Brown helped to raise and DWS gave $50K in Dues that counted towards our event total. We made great efforts to assist the Mournings in raising and to engage other individual raisers but these did not produce any significant or successful raising. The lion share of the raise was through Leader Pelosi call time. The Mourning’s assistant Shari Rochester handled the outreach for this event, as she did in 2010. The Mournings did not personally contribute. **As this is a POTUS event, future event recommendations do not apply. We continuously try to keep the Mournings engaged but have not received any contributions since 2011 (raised by DWS) and they have given infrequently to the DNC. Deutch securing them as our host was a big win but it may be more productive to turn his attention to other big name donors in South Florida rather than put all of our focus on the Mournings.**

**New Donor Notes** – \*Melissa & John Ceriale: Melissa first attended the Frankel event in February with her friend Christine Hall. Melissa completed a max-out for this event and raised the same from Christine and Andy Hall. The Ceriales and the Halls (NGP address in CT) quickly became very engaged in our national events. John gave an additional max in September 2014 through an HRC event in 2014. The Ceriales are good friends with Nancy Corrine, Leader Pelosi’s daughter. Keep in touch to keep the Ceriales engaged!

Lisa DeBartolo – based in Tampa but is rarely there. Her father was a friend of Leader Pelosi and she had been a longtime prospect. Ideally, we hope she could host an event in Tampa but needs more cultivating.

**[April 2014: Texas Trip #2 / Houston POTUS (Joint)]**

**Wednesday, April 9, 2014**

**House Senate Victory Fund Dinner with President Barack Obama at the home of Sheridan & John Eddie Williams**

**Houston, TX**

**EVENT RAISE – HSVF-Total: $714,100; DCCC-Take: $418,750**

S:\South\South 2013-2014\2014\Q2\04.09 POTUS-HOUSTON\_Joint

This was the first DCCC event in Houston with President Obama and the first event in Houston with President Obama since 2012 (I believe). In consultation with the DSCC, we decided to ask Sheridan and John Eddie and both Reid and Pelosi called to ask. They were not asked to raise a specific number but did help with some outreach and contributed $32,400 each to the HSVF. In the past, John Eddie has raised maximum contributions from his three law partners, through meetings with Leader Pelosi in Houston. Despite John Eddie’s efforts, his partners did not contribute, citing general donor fatigue. The three Houston area members varied in their participation – Congressman Gene Green did not participate. Congressman Al Green agreed to make calls but, as has been true for many years, he is a weak raiser for the DCCC. Instead, he gave $32,400 to the DCCC in Member Dues. Congresswoman Sheila Jackson Lee raised successfully for this POTUS event in conjunction with her March DCCC event with Leader Pelosi in Houston (see March 2014 event details above). **As this is a POTUS event, future event recommendations do not apply. We had many new donors through this event, many of whom are strong DSCC donors. We should try to reengage these people but keep in mind their ties to the DSCC. That said, Lillie Robertson & Sara Morgan were new maxers through this event – Lillie having given lower amounts through Carrin Patman and Sara having been a longtime prospect with large capacity, who we had developed more ties with through Carrin Patman and Ellen Susman. Both maxed to the HSVF and Sara gave an additional $16,200 to the DCCC to fill out her max after spending time with Leader Pelosi at the event. Both of these women should be cultivated and maintained well and can be solicited through the Mostyns and, even stronger, through Carrin Patman’s event.**

**[June 2014: Estes in DC]**

**Tuesday, June 24, 2014**

**DCCC Reception with hosted by Norman Estes**

**Washington, DC**

**EVENT RAISE: $76,400; Annual Raise Goal: $160,000**

**(+$6,000 to NP4C&PTF)**

[Event] S:\South\South 2013-2014\2014\Q2\06.24 Estes-AHCA Reception

[Annual Raise] S:\South\South 2013-2014\2014\LISTS\$$$ RAISE Trackers\ESTES Raise 2014

This was the first of two annual events hosted by Norman Estes with Leader Pelosi. This was a reception in Washington, DC – in the past Norman arranged seated dinners and the decision to opt for a reception was made to include more of AHCA’s network. [**NOTE:** Due to last minute votes, Leader Pelosi and the other several Members invited were not able to attend. Leader Pelosi dropped-by AHCA’s board dinner later that evening, at Norman’s request.] In 2014, we strategically planned to focus on PAC contributions for the DC event and focus on individual money in Napa. This was relatively successful on the PAC raising. The Napa event has been problematic (see August 2014 for more details.) Overall, the raise commit needs to be growing given the amount of participation they want but they are very hesitant to increase the amount and did not meet their goal in 2014. [**NOTE:** While this is not something Jennifer (AHCA) or Brandon (Norman’s political director) ever communicated to us directly, it became clear that Norman’s new role with AHCA has tasked him with increasing companies’ and CEOs’ participation across the board and some of our regular donors are resisting these larger asks. While we need to and should push them to step up their raise and results, it is helpful to understand these factors effect our efforts to increase the raise.] Additionally, their commitment should include a separate NP4C & PTF component which should mainly come from the PAC raising and you will work with the NP4C/PTF Director to decide what amount should be asked. **You should contact Brandon (primary) and Jennifer early in the year to begin discussing their commitment for the year. The ask should be for $150K minimum, working to return to $200K. This commitment must be approved by their Board and that is typically a lengthy process so the earlier you start the better. Again, once the commit is locked in, they will not change much and definitely. In 2014, the goal was $150K but they wanted credit for $10K given through a POTUS event so we plus-ed up their goal to $160K. For all of their events, Brandon & Jennifer handle all of the raising – Brandon/Norman largely individual money and Jennifer/AHCA largely PAC money. They are notoriously late with RSVP & commit information so checking in regularly is important.**

**[June 2014: Texas Trip #3]**

**Friday, June 27, 2014**

**DCCC Finance Meetings with Leader Pelosi**

**Dallas, TX**

Meetings: Russell Budd; Elba & Domingo Garcia; and Lisa & Charles Siegel and Rachel Siegel

\*NOTE: Dallas Meetings – We have had a varied but largely successful track record for meetings in Dallas. We also tend to have less excess time in Dallas for meetings than we do in Houston. The top priority meeting targets are DJ & Les Weisbrod and/or Elba & Domingo Garcia (see May 2014 for notes) as they require the meeting to write. When traveling during or prior to an event with Marc Stanley (especially), you should offer meeting time for prospective targets. Russell Budd – Until 2011, Russell consistently gave with DJ & Les Weisbrod and the Garcias (the Weisbrod were the connector). Since then, he was giving to the DNC and DSCC and had been very unresponsive. He agreed to this meeting which went very well and committed to max and said he’d ask his wife, Dorothy to consider maxing as well. However, he was unresponsive for months, throughout the AAJ event and in September, said he had not committed to max and would give something later. It is unknown what the issue is here but understood that is a larger disinterest in the House vs Senate or Presidentials. Charles Siegel – Charles had been a larger donor in past years and then tapered off completely. He originally said he’d give something smaller (potentially $10K) and was not able to attend but his wife and daughter joined him, wanted to attend the POTUS event and he gave $20K. He is likely not going return to maxing soon but this relationship should be cultivated to maintain consistent $5K to $10K (when possible) support through our Dallas events.

**Saturday, June 28, 2014**

**DCCC Finance VIP Meet & Greet with Congressman Fil Vela**

**Brownsville, TX**

**EVENT RAISE: $60,000**

S:\South\South 2013-2014\2014\Q2\06.28 Vela Brownsville Meet and Greet

This was the first and only DCCC event Congressman Vela has hosted and was a special circumstance. This event was scheduled in late June during the children border crossing crisis in addition to an (official-side) visit to the border. Earlier in the cycle, Vela had proposed many, ever-changing event/swings in Brownsville and/or Corpus Christi. This is money that we almost definitely could not raise without his participation. (\*Although, Cuellar has also floated the idea of raising in Corpus Christi but has never materialized seriously.) **Vela is an aggressive raiser but was reluctant to the structure and communication needed for events with the Leader. We should continue to discuss the potential in his district – always checking with Missy and Member Dues first as he often has many other irons in the fire.**

**[July 2014: Dallas POTUS]**

**Wednesday, July 9, 2014**

**DCCC Dinner with President Barack Obama at the home of Wendy and Marc Stanley**

**Dallas, TX**

**EVENT RAISE: $498,100**

This was the first DCCC event with President Obama in Dallas. The DNC brings POTUS to Dallas once or twice a cycle for an event hosted by Naomi Aberly, who is a huge raiser but refuses to raise for the DCCC because we have pro-life members. Her event had happened earlier in the year and did drain some interest from ours. Our Dallas area Members are – Reps. Eddie Bernice Johnson and Marc Veasey. This event happened during session so they were not able to attend and the border crisis was ongoing putting pressure on the President’s visit – for these reasons, our member participation was low. Veasey made limited calls and never planned to attend. EBJ raised two $10Ks but was not able to make it because the political/official events related to the border crisis. Additionally, the event occurred the Wednesday of Fourth of July weekend and response was incredibly low until very last minute. Ultimately, Marc Stanley raised the vast majority of the contributions for this event. Leader Pelosi made many, many calls, most at the suggestion/request of Marc Stanley. **As this is a POTUS event, future event recommendations do not apply. We had many new donors through this event but many stated at the time they were giving solely because of the President. This was a large majority of Marc’s personal network so I suggest giving special deference to Marc on how and who is worth pursuing in the future.**

**[July 2014: AAJ Weekend]**

**Saturday, July 26, 2014**

**DCCC Dinner hosted by the Trial Attorney Community**

**Baltimore, MD**

**EVENT RAISE: $265,000**

S:\South\South 2013-2014\2014\Q3\07.26 AAJ Baltimore

This is an annual DCCC event that is hosted by members of the trial attorney community. **AAJ’s raise is the largest source of contributions for the South Region by far and away.** Linda Lipsen, who is CEO of the American Association for Justice, usually organizes the event around AAJ’s annual conferences. For this reason, the location varies and money comes in from around the country. Linda and the AAJ Officers and Executive Board raise all of the money for this event. As the event is typically in late July, their raise is an ongoing process throughout the year it is important to be in touch with AAJ about any of their donors, targets or overlapping targets.

(\*See July 2013 for overlapping raise notes.) In 2014, AAJ was especially focused on supporting the Senate to preserve the majority. As a result, their overall raise commit was lower and we did not use the “Additional Raise” tool to limit overlapping credit. Consequently, the raise total of $265,000 includes several checks that were previously raised through other events or double credited, especially with the July Dallas POTUS event. Moving forward, I highly recommend bringing the “Additional Raise” tool back as much as possible. **This event will likely be scheduled in late July during their annual Summer Conference (they have many large meetings). That said, you should reach out to AAJ in January to introduce yourself, begin to inquire on their plans for the year, etc, and keep in touch regularly. Developing a strong relationship with AAJ is critical.**

**[August 15-17: Napa Valley Weekend]**

**Friday, August 15, 2014**

**DCCC Luncheon hosted by Norman Estes**

**Rutherford, CA**

**EVENT RAISE: $67,500; Annual Raise TOTAL: $144,900**

[Event] S:\South\South 2013-2014\2014\Q3\08.15 Estes-AHCA Napa Lunch

[Annual Raise] S:\South\South 2013-2014\2014\LISTS\$$$ RAISE Trackers\ESTES Raise 2014

This is an annual luncheon hosted by Norman Estes with Leader Pelosi on the Friday of the Napa Weekend. In 2014, we strategically planned to focus on PAC contributions for the DC event and focus on individual money in Napa. The Napa event has been problematic for the past few years. Norman and Gov. Parkinson of AHCA are often the only ones in this network attending the Napa Weekend so securing attendees to come to Napa is unnecessarily difficult. We have discussed scheduling an event in LA or San Francisco or another city where they can gather other CEOs to engage them and get larger contributions. However, they have never been able to give us actual city/date recommendations – This is worth trying and we should try to coordinate this with an existing fly-in or board meeting, etc. That said, the Napa Lunch is a favorite of Norman’s and he opted to keep it when we addressed these concerns in 2014. While we defer to our hosts as a rule, we need to continue to address the utility of the Napa lunch. It should also be noted that – Beyond his max-out and this raising, Norman has become a large supporter of HMP and other campaigns, etc at in support of Leader Pelosi. **For all of their events, Brandon & Jennifer handle all of the raising – Brandon/Norman largely individual money and Jennifer/AHCA largely PAC money. They are notoriously late with RSVP & commit information so checking in regularly is important. In 2014, many of the individual commits they reported were either reneged shortly before the event, took months to come in or never came in at all. When checking in, you should push to get contributions in ahead and/or confirmed multiple times.**

**[September 2014: New Orleans]**

**Sunday, September 21, 2014**

**DCCC VIP Roundtable & Reception hosted by Congressman Cedric Richmond and Yulia & John Houghtaling**

**New Orleans, LA**

**EVENT RAISE: $41,000 + Richmond’s $75,000 Dues = $116,000** (Event Goal: $75,000)

This event was the result of years of pushing Richmond to host a DCCC event in New Orleans. In the Spring of 2014, Steve Mostyn visited Leader Pelosi’s office and introduced John Houghtaling, who he is working with on Hurricane Sandy claims. John expressed an interest to host an event with Richmond. John hosts many events at the local in New Orleans and has a longtime, very structured system of mailings he uses to raise a high volume of low-dollar contributions. This system is complicated by some of our federal rules, etc. We tried to augment the system but scheduling changes, etc complicated that process. In the end, John was not comfortable soliciting higher dollar contributions personally and insisted in the future that he could raise a large sum using his system. **New Orleans has a limited base of higher-dollar donors and Richmond is not an aggressive raiser. We should pursue something smaller, possibly with a different featured guest than Pelosi where lower-dollar formats will work more smoothly. I don’t recommend replicating this event but, in the overall need to expand beyond Florida and Texas, recommend putting was has been built in NOLA to use.**

**[October 2014: San Juan]**

**Saturday, October 18, 2014**

**DCCC Finance Reception hosted by Congressman Pedro Pierluisi**

**San Juan, PR**

**EVENT RAISE: $52,500**

S:\South\South 2013-2014\2014\Q4\10.18 Puerto Rico

This is an annual event hosted by Congressman Pedro Pierluisi with Leader Pelosi in San Juan. The past two events were hosted at the home of Cary Pierluisi and Andy Guillemard (Congressman’s sister and brother-in-law) but in 2014, the event returned to Pierluisi’s home.

You will communicate exclusively with Carmen Feliciano, Pierluisi’s COS, but Andy Guillemard is the key raiser in their group. The first two events in 2010 & 2011 raised approx $150K, in 2012, raised $100K, in 2013 raised $75K and in 2014, raised $50K – While this event represents money that cannot be raised through other avenues, there is a clear downward trend. In 2014, Pierluisi’s team would only agree to $75K goal and then several larger commits fell through last minute – but were clearly not effectively firmed up. **If we can get Pierluisi to agree to $100K again, this event will be worthwhile. They are very conscious of their commits and the $100K commit will guarantee at least $80K+ actually in the door and signal a renewed interest in raising for the DCCC. That said, Pierluisi has indicated he will run for the Governor of Puerto Rico. So, it will likely be an uphill battle getting their focus and commitment. This is 100% worth pursuing but should be discussed thoroughly.**

**FEEDBACK**

Overall in 2013, the South was successful in expanding upon its many existing and building a number of new events and networks in Florida & Texas. In 2014, we had the benefit of three POTUS events which were critical during this particular year as we were dealing with a great deal of push back in deference to supporting the effort to save the Senate majority. We will need to make a dynamic effort to engage donors in these states early on to maintain strong relationships and solidify their interest in supporting the House for the 2016 cycle.

At the beginning of this cycle, I wanted to make a big effort build events outside of Florida and Texas as well. As noted above, this was met with mixed success but the overall theme was that we need to maintain or more consistent presence in these cities/states before we can break in these donor bases and get the raise numbers we want. We can try to continue to bring Leader Pelosi to these and other cities but I highly recommend finding other surrogates who can help shepherd or tag-team these efforts. Texas and Florida will always be our most profitable states and we should devote the large majority of efforts to maintaining and expanding what we have built there. But, these states will also always be very profitable and popular areas for Presidential campaigns, the DSCC, etc so it is in our interest to expand into other areas and build unique revenue streams.

Lastly, one note on the management of the South Assistant – The DCCC’s travel policy on assistants is that they only travel when absolutely necessary, for budget reasons. For this reason, the South Assistant typically travels very infrequently. When possible/needed, it is in your interest to get the Assistant on these swings as they will not be able to learn the job fully without seeing it on the road. This will allow your assistant to grow enough to be able to take over projects such as building out new events, networks in new cities, etc. This is something we struggled to expand with travel schedules and turnover.