

COVER MEMO

Memo

To: Michelle Nunn

From: [Your Name]

cc: Gordon Giffin, Ron Martin, Senator Nunn, Colleen Nunn, Valeria MacPhail

Date: [Date]

Re: The Campaign Plan

We are pleased to provide you with planning documents from all operations of the campaign. The memos enclosed in this document provide a summary of our proposed plans for each department of the campaign for 2014. We identify the staff responsible, the process we will follow, and a timeline for completion of the work. We invite your thoughts and suggestions, and as you will see, in a few areas, we are depending on your direct input.

We are meeting with the senior staff in an all-day planning meeting on Tuesday, December 17th, and if possible, we would like to have your comments before the meeting. Please provide your feedback on staff memos directly to the two of us. We do expect much of the content of these memos to be reviewed in context of our strategic discussion on Monday, December 16th, and we will hold time at the end of day to cover any topics that are not noted in our discussions.

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I: Vote Goals & Target

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Campaign Plan



December 9, 2013

TO: The Nunn Team

FR: Diane Feldman

RE: Revised Input for the planning document

Here is some input on vote goals and research for the planning document.

Vote Goals

My recommendation for a statewide goal is 1.4 million. We can very likely win with 1.35 million but since we are working to enlarge the electorate, I favor a more aggressive number.

In 2010, 51 percent of 5,033,307 active voters participated in statewide contests. We do not know the final registration for 2014. With a recent file purge, the Secretary of State lists 4,933,572 now, and listed 5,479,475 in February of 2013. If the active registration returns to 5,300,000 (through a combination of natural growth and our own efforts) and turnout is 52 percent (1 point higher than in 2010) then we will need 1,378,001 votes to win. Rounding up reduces the risk and so 1.4 million is my recommended goal.

Democrats with strong campaigns have generally won 1.2 million votes. The most recent contested statewide off year election was the 2010 gubernatorial. Democratic candidate Roy Barnes fell short of 1.2 with the presence of a third candidate and in a bad Democratic year. The high mark for Democratic votes is President Obama's 2008 performance of 1.8 million and he received 1.77 million votes in 2012.

As the graphic shows, we estimate the Barnes vote included 23 percent support from whites for 412 thousand votes and nearly 700 thousand African American voters. We are aiming to enlarge the electorate by approximately 200,000 votes from drop-off and inactive voters. Approximately a half a million more African American voters participated in 2012 than in 2010, and there was also a surge of young voters.

In addition to enlarging the electorate, we aim to persuade another 100 thousand white voters, reaching 30 percent white support, which our polling shows is feasible, while discouraging the kind of Republican surge we saw in 2010 so the total vote in the U.S. Senate race is approximately 2.7 million.

The scenario will be adjusted periodically with additional research, voter file work, and analytics.

The Voter File

The voter file needs to undergo three levels of improvement. The first is basic clean-up, the second is turnout modeling, and the third models candidate support. A firm that specializes in analytics should be retained to conduct the modeling work. Such modeling should likely be conducted through the coordinated campaign with the DSCC and the DGA involved in the selection of a firm.

Voter file clean-up means improving the phone match so people are more reachable, and establishing better voter history metrics on the file to which the Georgia Democratic Party has access. The file should also be periodically matched against the Secretary of State file so we know who has been dropped and added to voter rolls.

The vote history metrics are particularly important in Georgia. In some states, when a voter moves, the information about prior elections in which they participated at their old address is preserved on the file. In Georgia it is not. The information is recoverable through matching change of address cards and other information but at present the file housed at the state party does not have that information (although the Catalist file we have used for polling and analysis has much of it).

We understand that the state party coordinated campaign has retained BlueLabs, a prominent analytics firm that grew out of the Obama for America campaign, to clean up the voter file.

Turnout modeling applies a probability of voting to every individual on the file, and can include those who are not registered as well whose names and addresses are available through commercial data. The procedure uses vote history and demographics to estimate the probability of each individual turning out. The resulting scores make mobilization efforts more efficient by targeting those who, for example, have a 40-60 percent chance of participating. Such modeling also adds a level of detail to analyses. By using the turnout scores in polling, the results show where we stand depending on the number of voters who turn out. Thus, if we are not winning among those who have an 80 percent plus chance of voting but are winning among those who have a 60-80 percent chance of voting - and we know how many voters are in each category - we can say how high the turnout needs to be to win.

Support Scores and Persuasion modeling will help us find the white voters on the file who are more likely to support Michelle Nunn. The procedure begins with field IDs – people our field staff have identified as supporting Nunn – generally supplemented by a very short telephone survey with a large sample size. It is not a regular poll but basically a large pool of IDs. Commercial data supplies demographics and other behaviors linked to individuals and an analytics firm uses the data to figure out the best formula to predict Nunn support in the universe of IDs. A score designating probability of supporting Nunn is then applied to each individual on the file. For example, we may know that a young, urban white woman who is part of an international frequent flyer program is more likely to support Nunn than an older white man in North Georgia who does not travel. The support scores assigns a more exact probability to each

using these data like that in the example. The process helps refine vote goals by demographics and geography. Persuasion modeling follows a similar procedure for messaging or advertising.

Advertising and Message Research

We have conducted thematic research that establishes a message frame rooted in Michelle Nunn's biography and values that establishes her as different from other politicians, in concert with voters' own values and aspirations, and distinct from the mess in Washington.

Three additional message research steps should occur over the next six months with additional research later that develops contrasts with our Republican opponent, refines strategies, and tracks our success. We have given Jeff a complete proposed budget and timeline through November. These are the near term goals:

- (1) **Advertising Research.** The media team is working on several approaches for introducing MN in advertising and for responding to anticipated attacks. We plan on testing those media approaches in January. The precise parameters of the test depend on how many advertisements the team wants to evaluate and in what contexts.
- (2) **Expanding the message.** Initial polling and focus groups established MN's fundamental appeal and the parameters of message. During the first quarter of 2014, we should refresh that research and expand the message by testing language that responds to voters' deep economic concerns and is consistent with the core message. We should also test harder attacks against Michelle Nunn than we tested in the baseline poll to refine targets. Fulfilling these goals requires another wave of polling and, perhaps, an additional round of focus groups as well. We propose conducting such research in February after some of the policy work is complete.
- (3) **The Republican Primary.** Our chances of winning depends in part on who wins the Republican primary and our message may require adjustment to provide a strong contrast with our eventual opponent. We should poll Republican primary voters to assess the standing of our prospective opponents and strategies for altering the primary dynamic.

Both public opinion and voter file research are ongoing processes. Later, we will establish the strongest contrasts with our Republican opponent, continue to test advertising as needed, and conduct tracking polls to assess progress toward our goals.

The analytics process is also ongoing as the analytics firm will update models periodically using the campaign's ID data and polling data, and incorporated updates from the Secretary of State.

The attached graphic summarizes the voter research process, including our own work and that of an analytics firm.

Total Nunn Support = 1.4 million out of 2.7 million cast = win

Persuade 100K likely of year white voters to grow to 570K white support or 30 percent white support with added young whites

Discourage Republican surge in Senate race to hold total to 2.7 million cast

Potential Growth for Nunn from added turnout and registration

150K African American voters from a 500K surge plus 869K inactive

45K young urban whites, 5K Latino and Asian

Democratic core vote = 1.1 million out of 2.57 million

412K white voters (estimated Barnes vote = 23% support)

700K African American (estimated Barnes vote = 92 percent support)

Completed

- Initial Catalist counts for voter analysis
- Baseline poll to establish message and broad targets
- Focus group research to assess presentations of MN

First quarter 2014

- *Voter file cleanup*
- *Turnout modeling*
- Advertising research
- Second poll to:
 - Look at connecting Michelle and voters on issues
 - Reassess broad targets after hard negatives
-

Later in 2014

- *Support models*
- Republican primary polling
- Periodic assessment polls
- Additional advertising research
- Contrasts with Republican opponent
- *Update models*
- Tracking and monitoring progress

II: Political Campaign Plan

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Campaign Plan

The purpose of the political department is to act as the liaison to Georgia elected officials – providing them with information and a point of contact, then asking them to assist the campaign in electing Michelle Nunn to the Senate. Most elected officials will: (1) validate Michelle with the media and their constituents, (2) assist in raising money, (3) identify key leaders in their community and (4) assist with recruiting volunteers.

Communicating With Key Democrats

A top priority for the political team is to stay in touch with key political leaders. There are many ways we will work with these leaders, but we will also establish a regular email from Richard McDaniels to our supporters, set up meetings for Michelle with leaders when she travels to their districts, and sets up a call/coffee with key VIPS at regular intervals.

Plan:

- 1) Richard will send a weekly email to Political VIPS and partners on Friday mornings. This newsletter will describe the activities of the previous week and give people an appropriate look ahead at the upcoming week.
- 2) VIP Outreach: For the most senior political VIPS, Kent and Jeff will take responsibility for regular check-in's and touching base. They will

also be responsible for making sure Michelle calls or sees these VIPS's on an appropriate and regular basis. Updates about their views and recommendations will be included in weekly reports.

- 3) Georgia Democratic Party Leaders : Starting in January, Richard McDaniels will convene conference calls to groups of leaders in the Democratic Party.
 - Executive Committee – 40 members; the Executive Committee call will be the first Tuesday of every month.
 - 13 Congressional District Committees – In the third week of every month there will be 4 calls with similarly grouped Congressional District Committees (Metro, North, Southeast and Southwest Congressional District Committees).
- 4) Elected Officials
 - Congressional – The campaign will schedule a meeting hosted by Congressman Lewis with the delegation the next time Michelle is in DC (Late January). Additionally, the political director will check-in with the appropriate representative of each congressional campaign. As the Coordinated Campaign begins, many of these conversations and connections will be continued by the Field Director.
 - State House – In order to engage the state house members on a regular basis, there will be periodic conference calls (quarterly). These calls will have Michelle when appropriate and a campaign representative the remainder of the time. During session, the campaign will host two get-togethers/meetings (one at the beginning of session and another at the end). To allow for a discussion between the caucus members and the campaign.
 - State Senate – The state senate will be treated similar to the state house. There will be periodic conference calls (quarterly). These calls will have Michelle when appropriate and a campaign representative the remainder of the time. During session, the campaign will host two get-togethers/meetings (one at the beginning of session and another at the end). To allow for a discussion between the Senators and the campaign.
 - Mayors – The campaign will convene a call with democratic mayors in early January. Then continue calls throughout the campaign on a regular basis (one per quarter).
 - Safety Officers – Richard McDaniels will build our list of safety officers supporting Michelle. The members of the group will be asked to allow the campaign to release their name as a supporter, to do outreach with other safety officers, attend and recruit individuals to fundraisers and other activities as appropriate. The goal will be to recruit 25 safety officers per

month to the list with the intention of releasing the list in September.

- Others – The campaign will also maintain a list of other elected officials (city councilmembers, county commissioners, school board members, etc.) that have endorsed Michelle. These people will receive regular communications via conference calls developed by Richard. They will also received the newsletter. They will be asked to show their support of the campaign in public ways, tapped to help with fundraising and asked to identify volunteers and leaders in their community able to both represent the campaign and volunteer in our field operations.

This outreach program – thru regular call from staff, quarterly call from Michelle and weekly emails about the campaign to elected officials and Democratic Party leaders will provide these important individuals with a clear line of communication with Michelle and the campaign. It allows the campaign to receive smart guidance, intelligence from the field and engage powerful surrogates for our work.

Political Groups For Nunn

Republicans for Nunn

Beginning in December the campaign will identify Republicans, both elected and registered, willing to sign –up as a member of Republicans for Nunn. All members would be asked to allow the campaign to release their name to the media and might be called on to represent the campaign, be interviewed by the media and reach out to similar people in appropriate ways.

We would like to ask Kent Alexander with assistance from Michelle, Ron and Colleen, to start us with a list of Republicans likely to be supportive of Michelle. Additionally, some of these will require Michelle or a family members personally requesting support.

Plan:

- 1) Kent will create a likely list of steering committee members in early January. From this list there will be a plan for identifying additional Republicans to be targeted and a plan for outreach.
- 2) The goal is to add 25 members to the group each month with a likely release of the list in June, within weeks of the primary being completed. There may be a decision to have a second release after the runoff, depending on the outcome of the election.
- 3) Some possible first targets are Jim Grien, John Wieland, Jim Cox Kennedy, Tom Cousins, Jim Geiger and Arthur Blank.

Independents for Nunn

In addition to Republicans for Nunn, the campaign will identify people considered Independents. This is difficult to identify because Georgians do not register as an Independent. Similar to the Republicans for Nunn, they will be asked to allow the

campaign to release their name as a member of the group, they will be asked to do interviews (when appropriate) and take part in campaign activities.

Plan:

- 1) Jessica Kirkwood, with political team support, will identify a defensible definition of an Independent by December 20th. Then she will create a system for recruiting people to this group.
- 2) We would like Ron Martin to consider “Chairing” this group.
- 3) The release of this group will be timed into the message plan, and we envision significant surrogate speaking and message opportunities.
- 4) Some possible lead volunteers are John Wuichet and Harold Ball.

Surrogate Program

As the campaign is getting more requests for Michelle’s time and hosts are open to surrogate opportunities, the campaign will begin to deploy surrogates to events. Ideally, Ron Martin and other family/friends can participate as our chief surrogates. Beginning in March and April, the campaign will empower elected officials, community leaders and Nunn County Chairs to represent the campaign.

- 1) Surrogate requests will originate in the scheduling meeting. Whenever events are identified for a surrogate they will then be assigned to the appropriate person
 - Kent for senior level surrogates, including family members;
 - Jessica for surrogates in the 121 counties with Nunn County Chairs;
 - Richard for other political leaders; or
 - Michael Tyler for constituency leaders.
- 2) All surrogates will be provided with appropriate talking points, background materials and information concerning the event.
- 3) Once surrogates are scheduled, that information will be brought back to the scheduling meeting to confirm its completion. The person recruiting the surrogate will check-in after the event to identify appropriate follow-up with the group or individuals, including thank you notes.

Finalizing Endorsements

Endorsements are an important vehicle for elected officials and key leaders to show their support for the campaign. In most cases the endorsement will be used with the media, similar voters and the public at-large. Many elected officials have been incredibly generous to Michelle and the campaign. From here forward the compilation of endorsements will be managed by Richard McDaniels.

Plan:

- 1) Richard and the team will create an endorsement form by December 24th. All people endorsing Michelle will be asked to fill it out. The form will include a request for the endorser’s name as they would like it to appear, their endorsement and an explicit request to use the person’s name publicly.

- 2) Richard will set -up calls for Kent / Jeff / Gordon to introduce the team and establish Richard as the point of contact. They will ask for advice and provide briefs on campaign activities. If appropriate, Kent/Jeff/Gordon will ask for the individual's support.
- 3) Richard will work with Lauren for two hours of political call time for Michelle to make the endorsement requests.
- 4) Richard will work with Stacey's list of completed and priority endorsements spreadsheet for calls/Michelle's calls.

Candidate Filing

In Georgia, the press and political elites treat the Candidate Filing like the start of the campaign season. This year Filing happens the week of March 3rd – 7th. Kendra-Sue Derby is convening the first meeting of appropriate staff to create a plan for this week, including travel within the state and proposed events – both reactive and proactive.

Plan:

- 1) Kendra-Sue will create planning team and a rough schedule by January 1st.
- 2) The team will continue to meet on a regular basis to create a strong week of events, including possible crowd events.

III: Voter Activation and Mobilization: The Coordinated Campaign

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Campaign Plan

The Coordinated Campaign (Victory 2014) is a program of the state party. All our voter mobilization activities are managed thru Victory 2014. This includes (1) voter contact, (2) volunteer recruitment and engagement, (3) constituency outreach and (4) voter protection. Victory 2014 allows us to legally and efficiently collaborate with other campaigns allowing us to maximize both our fundraising and our volunteer hours.

Field Plan (Voter Contact)

What It Takes To Win

We are working on “first draft” statewide vote goals and a “first draft” of county goals. We will have goals that are more accurate and detailed – including city level and ultimately precinct level by the end of February when clean up of the voter file is complete (detailed explanation of this process provided in the plan). We have a number of tasks we can complete without the final data.

Based on basic analysis of the last few years turnout, we are working from the need to garner 1.4 million votes. That assumes 52% turnout and 5.3 million registered voters.

Plan:

- 1) Voter File

The only way we can get a good win number is with a clean file and a candidate specific score. Cleaning the file costs money and takes time. The file can be cleaned by:

- robo call program;
- enhancing the data by purchasing additional phone numbers and voter information and
- having volunteers use the file.

We will do all three.

A robo call program will allow us to clear out all bad numbers – disconnected phones, business, etc. This is very important because volunteers will be more effective and efficient when they start contacting voters.

After identifying people with bad phone numbers, we can do a phone match to find more phone numbers. There are many levels of this with varying costs. At this point we are planning for a moderate level of reach. At a later date, we may need to augment, but those decisions can be made after we have identified our usage and the phone match for the file.

We have solicited RFP's from three firms to complete this work. The work on the file will be complete by February 15th.

Having the volunteers use the file is the best way to identify where there are issues. We want people canvassing and phoning the list we will ultimately use to identify and turnout supporters. This is the most effective way of knowing the walkability of an area and which voters are at each phone number and address. It is better to have people working with the file now when we have more time to fix any issues than later when time will be a greater issue.

After cleaning the file, we will create candidate specific "scoring" or "modeling". We will be appending turnout scores, support scores and persuasion scores to each voter's record. There is some scoring already on the file but it is applying national scores to the Georgia file. While this is certainly far superior to the pre-2006 method of targeting voters, it is not nearly good enough for a modern aggressive field operation and needs to be updated. However, the challenge is that as soon as a score is put on the file, it begins to degrade. So, it is important that the data gathered by the volunteers is constantly added to the file – it will assist us in creating the scores.

We will be focusing our efforts on creating three scores:

- 1) Turnout Scores: This number will give our field staff and volunteers a sense of how likely the voters is to show up and vote in the election. These scores allow us to focus our effort on those that can be encouraged to vote with some engagement by

- the campaign (canvassing and phoning) and identifies consistent voters who always vote.
- 2) Support Scores: This number allow us to identify voters that might vote for Michelle. Historically, campaigns relied heavily on race to identify likely supporters. While this is clearly still a key indicator, using this score we can refine the way we think of voters and find white voters that are more likely to support Michelle. The campaign can then focus its efforts on the voters most likely to support without consideration of race or geography. Additionally, this allows us to contact voters in the most productive order.
 - 3) Persuasion Scores: These scores provide us with critical information that allow us to focus our efforts on voters that may be willing to consider Michelle if provided information and message. In this instance Victory 2014 would contact voters with a high likelihood of voting (high turnout score) and likely to be persuadable. Traditionally, these are referred to as “swing” voters. We are able to identify the likelihood that the individual would be persuaded in this Senate race, not just in general.

Our plan is to score the file in February and then refresh of the scores in August. We will begin the RFP process to hire a firm in January and ask the DSCC to support/partner in this effort.

2) Building Infrastructure/Operations

In order to support the massive voter contact program with a volunteer army, in late January, 2014, we will open 8 dedicated “field” offices in addition to the main office on the first floor of 1206 Spring. These offices will be located in Athens, Albany, Macon, Columbus, Savannah, Valdosta, Gwinnet and DeKalb. In up to another 10 locations, the campaign will maximize its resources by sharing office space with other candidates and local parties. We will also expect staff to travel to counties where the campaign cannot afford a dedicated office to support the work of Nunn County Coordinators and Democratic Party Chairs.

The field structure will have a field director and two deputy field directors as their leaders. They will have 8 regional field directors (RFD’s) and by election day 28 field organizers/volunteer coordinators (FO’s). The RFD’s and 8 FO’s will be hired in January to staff and support the field offices and volunteers. The remainder of the field staff will be phased in from March through October.

All Field Staff (volunteer or paid) will use the state party voter file. They will be expected to keep their voter contacts up-to-date and regular weekly reports will be created to allow the campaign to evaluate progress toward goals on both ID/persuasion and GOTV.

3)Mobilizing Volunteers & Early Voter Engagement

Ultimately, the campaign will be won or lost on its abilities to recruit enough volunteers to take part in targeted voter contact activities – activities like canvassing and phone banking.

Voter Contact – Mobilization and Engagement Timeline:

(1) January & early February – phoning and canvassing primary voting democrats and other activists to recruit volunteers and tell them about Michelle Nunn

(2) Late February, March & Early April – phoning and canvassing likely to vote persuadable voters to identify their willingness to vote for Michelle Nunn

(3) Late April and May – phoning and canvassing occasional voting supporters and persuadable voters already identified as supporters to get them to early vote, vote-by-mail or turnout to vote.

After the primary, the field program will evaluate what worked and didn't work in the primary, update the moved and create a detailed plan for the general election. A basic outline for the general election is:

- (1) Canvass & Phone Bank June, July and early August - persuadable voters that are likely to vote to ID them
- (2) Canvass & Phone Bank August and early September – persuade and Re-ID the voters
- (3) Canvass & Phone Bank Late September, October and November – persuade and GOTV.

Volunteer Recruitment & Engagement

To date, the campaign has been working with volunteer leaders to create affinity groups. These groups are in varying stages of organization and have different goals. Most of these groups will be folded into the Constituency Outreach program (Memo Included in Next Section) and given concrete goals around volunteer recruitment, fundraising and press opportunities.

Nunn County Coordinators/Committees

The next large focus of the volunteer program is to identify county party leadership. These leadership teams will mobilize volunteers to fold into our targeted field operation.

To begin identifying our County Leadership, we will divide the counties into two tiers. The top tier of counties -- 38 counties -- will require a volunteer steering committee to support the work of the field staff.

In the second tier of counties, the volunteer county Coordinator will be the primary campaign representative. The second tier covers 121 counties – 49 of which don't have a Democratic Party chair. Identifying, recruiting and supporting the county party coordinators is our first task. Ideally, this is a place where the campaign will find individuals outside the party structure. The campaign will need the insight and support of the Nunn/Martin family and friends.

The responsibility of the county party coordinator is to recruit and mobilize volunteers to reach out to target voters in their county (canvass & phone bank), represent the campaign at public events and create “visibility” for the campaign (yard sign placement, parade and fair involvement and forum representation), and to provide feedback and insight into thinking “on the ground.”

In December and early January, we will work with family and friends to identify and recruit Nunn County Coordinators in Tier 2. The goal is to recruit 50 in December, 30 in January and 30 in February. The remainder will be recruited as the campaign identifies additional county coordinators. It is important that the coordinators understand this is not a figurehead position but instead a working volunteer responsible for the success of the campaign in their county. They will be given vote goals for their county in the primary and the general.

After County Coordinators are chosen in the Second Tier Counties, we will need “steering committees” to support the work of the staff in the First Tier Counties. The tier one committee recommendations need to be gathered and thought given to diversity of politics, age, race and gender.

The Tier 1 Counties workplan is:

Lead:	Jessica Kirkwood
December 15	Identify 10 Nunn County Steering Committee members in each of the 38 Tier 1 counties.
January 15	Identify 15 additional Nunn County Steer Committee Members in each of the 38 Tier 1 counties.
January 15	Campaign Leadership Meets and Drafts Committee Lists
January 16	Jessica starts outreach to individual and asks them to serve.

All committees should be up and running by February 1st.

Team Nunn Volunteers

In the early phases of the campaign the volunteer team has worked to provide a structure for volunteers which will allow them to easily fold into the critical tasks of voter

contact – canvassing and phone banking. Many people have been asked to be Team Nunn Volunteers which are self-organized groups given wide range to choose projects that interest them. As the campaign moves into the election year, these groups will be asked to fold into voter mobilization and activation as much as possible.

Ideally, many of these Team Nunn Leaders will take leadership roles. Each RFD and FO will be looking for people to support the voter contact efforts. They need people to take responsibility for data entry, list creation, turf cutting, phone bank and canvass supervisors, visibility, comfort captains and many, many more tasks. This will allow people to take on critical tasks that meet their personalities and abilities.

House Parties

Every month, starting in January, volunteers will be encouraged to host House Parties in their neighborhood or community. These are low dollar (\$500 per location) events. The campaign will host a “house party” night where all of the house parties are invited to call into a conference call and hear a short message from Michelle Nunn. Certain House Parties will be invited to ask Michelle a question. Many of the larger house parties will have the option of having a staff member or leader speak at the party and represent the campaign.

The first four house parties have been scheduled for January 27, February 18, March 4th and April 10th.

Self-Organizing

The campaign will continue to encourage volunteers to think about politics in a new and different way. We will have opportunities for volunteers to host events like Dinner & Dialogue (November) or Service Projects (December). These are visibility opportunities and ideally some will become press opportunities either through the traditional media or online.

Volunteers as staff

The campaign will continue to recruit volunteers to fill roles throughout the full-time structure. The campaign has already recruited over a dozen full-time individuals as volunteers, many are in the finance office but they also assist in the organizing of volunteers and office organization. During the winter break, the campaign will work to identify committed volunteers from colleges and universities that can assist in all aspects of the campaign.

The campaign will recruit up to a dozen committed volunteers from January to May, 25 from May to August and another 30 from August to Election Day. Some will receive college credit but others are dedicated enthusiastic volunteers either retired or looking for an opportunity to give back in their community.

Other Volunteer Committees

The campaign has functioning committees active in policy, fundraising, voter protection and campaign support. These groups are covered in their respective areas and so are not a focus of this memo.

Voter Protection

The Voter Protection Program has three basic pieces (1) Recruit, train, and deploy people to watch (campaign/party observers) and work (election department staff) at polls, (2) advise campaign on election law and (3) respond to voter protection incidents with campaign and state party counsel.

Staffing

Given the significant number of attorney volunteers and the relatively early start on voter protection, we have an opportunity to effect both the staffing by each county's Voter Registration and Election Department (Election Department) and the campaign's observers. While it is not a requirement that either of these positions be filled with attorneys, this is a place that many attorneys and law students feel is appropriate to their expertise.

In most campaigns across the country, the voter protection team spends all of its time on recruiting observers at the polls. Observers are the people the campaign or state party places in the polls to watch what is happening. While they are an important part of the voting process, they have limited opportunities to effect the election beyond documenting the process. Given the incredibly difficult lift in changing the outcome of an election through a recount, these individuals are only useful in getting the Elections Department to clarify election law in a given poll on election day.

However, Victory 2014 can recruit and encourage individuals to apply to the counties' Election Department to work in the polls. These individuals are responsible for the smooth functioning of the election. While they wouldn't work for us, it is in the best interest of the campaign to have election staff that understand the opportunities and restrictions of the election law and are comfortable with technology.

To this end, the campaign will identify the deadlines for the recruitment of Election Department staff in our top 38 counties by January 15th. We will then work with the county Democratic Party, our RFD's and FO's and other interested parties to ensure the Election Departments have enough talented staff to meet the needs of the primary and general election.

Victory 2014 will create a plan for staffing the early voting sites, target precincts and vote-by-mail counting sites with the appropriate number of observers. Identifying and assigning these volunteers is a huge undertaking. The campaign will have one full-time staff person to work with a statewide team of voter protection volunteers. The staff

person will be hired in January to support both the statewide team and the regional volunteer teams. They will be responsible for the creation of all materials and the tracking, training and assignment of all voter protection volunteers.

The recruitment of volunteers has already begun and will continue until Election Day. Training will start in March and then continue at appropriate intervals into October. The weekly and monthly goals will be created when after the statewide team meets and the Voter Protection Director is hired. The Victory 2014 leadership will supervise this team and evaluate their progress toward goals.

Advise Campaign on Election Law

In order to properly advise the campaign, the Voter Protection team will create an outline of applicable election law for non-lawyers. The first draft of this document will be available by February 1st. It will then be circulated for review with the intention of having a document available for the staff by March 15th. This document will be the backbone of the voter protection operation. It guides in what the campaign can expect at the polls and how we can best accommodate voters. It will also help structure the language used on direct mail pieces, fliers and scripts.

Additionally, the Voter Protection team will be available to review materials being used by the campaign. The process will require their sign-off whenever the campaign discusses voting procedures – early voting, vote by mail or election day voting.

Respond to Voter Protection Incidents

Given the incredible burden to changing the outcome of any Georgia election through a recount, it will be even more important to get all voter protection incidents taken care of prior to the end of election day. Because all Georgia counties use the same electronic voting machines and they all feed directly into one county tabulation machine, there is very little opportunity for human error. All of this makes it even more important for us to push our target voters to early vote, thus giving the campaign and its attorneys additional time to deal with any voting challenges.

Victory 2014 will have a statewide voter protection boiler room staffed with attorneys starting the first day of early voting. They will have a network of volunteers in all of the 38 key counties (and as many of the additional counties as possible).

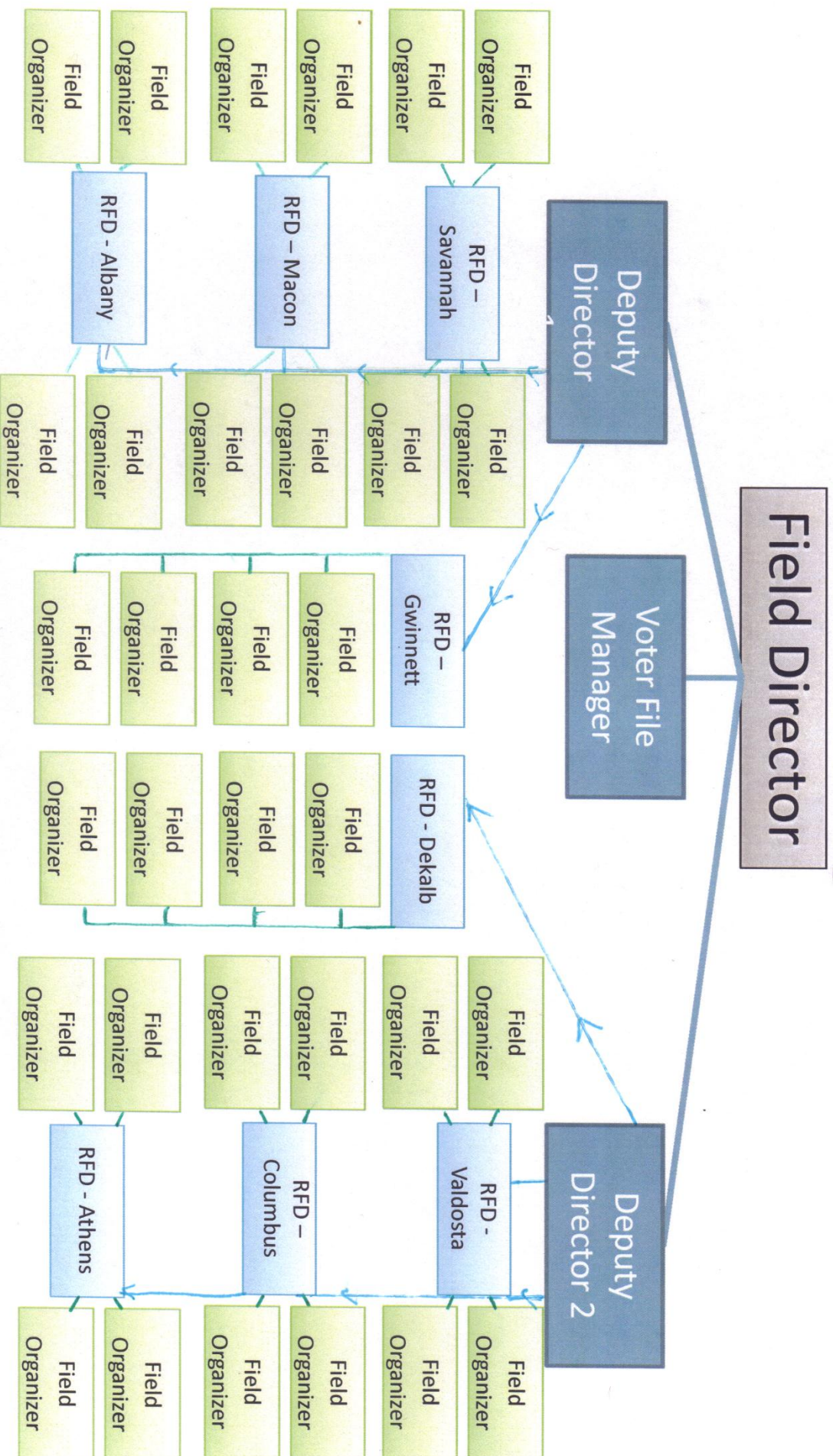
They will also have a dedicated hotline (an 800# if possible) for staff and voters to report any and all voting issues.

Plan:

- 1) The voter protection team will continue to meet on a weekly basis with Mike Jablonski (the state party attorney) and other key players.
- 2) The team will recruit a volunteer to work exclusively in Fulton County.

- 3) Two volunteers have been recruited to work on a revised outline of applicable election law so the campaign and the voter protection team can be aware of all controlling election law.
- 4) The initial working group includes Pinney Allen, Molly Burke, David Worley, Bret Hobson, Tedra Cannella Hobson, Mike Jablonski, Jenn Coalson, Suzanne Wakefield, David Dreyer, Kerry Quinn and Ann Brumbaugh.

Field Staff Org Chart



CONFIDENTIAL & PROPRIETARY

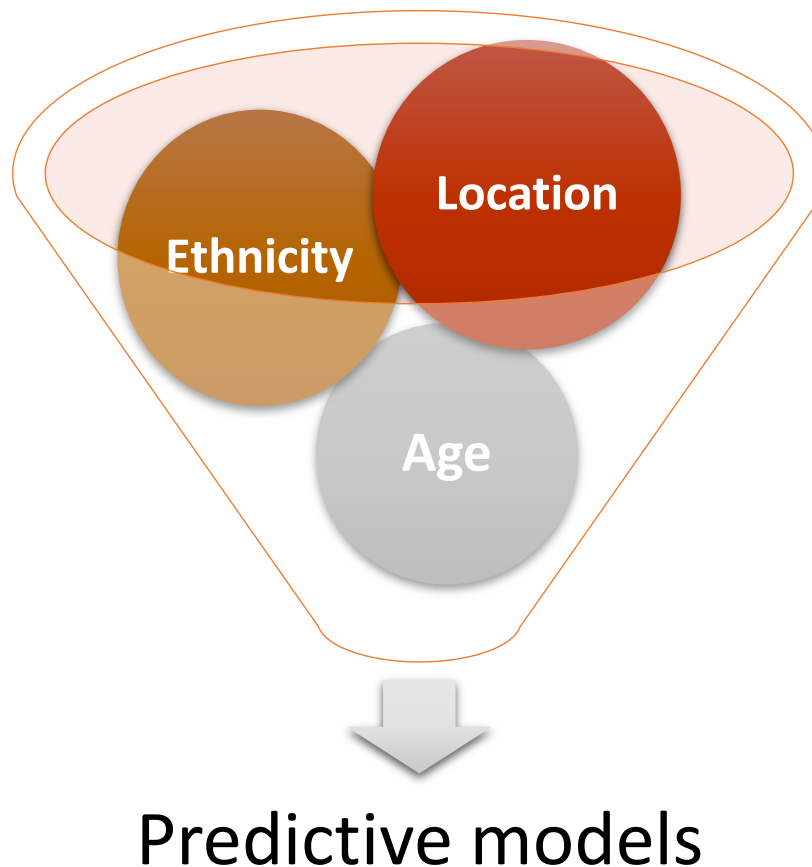


Predictive Models

An Introduction

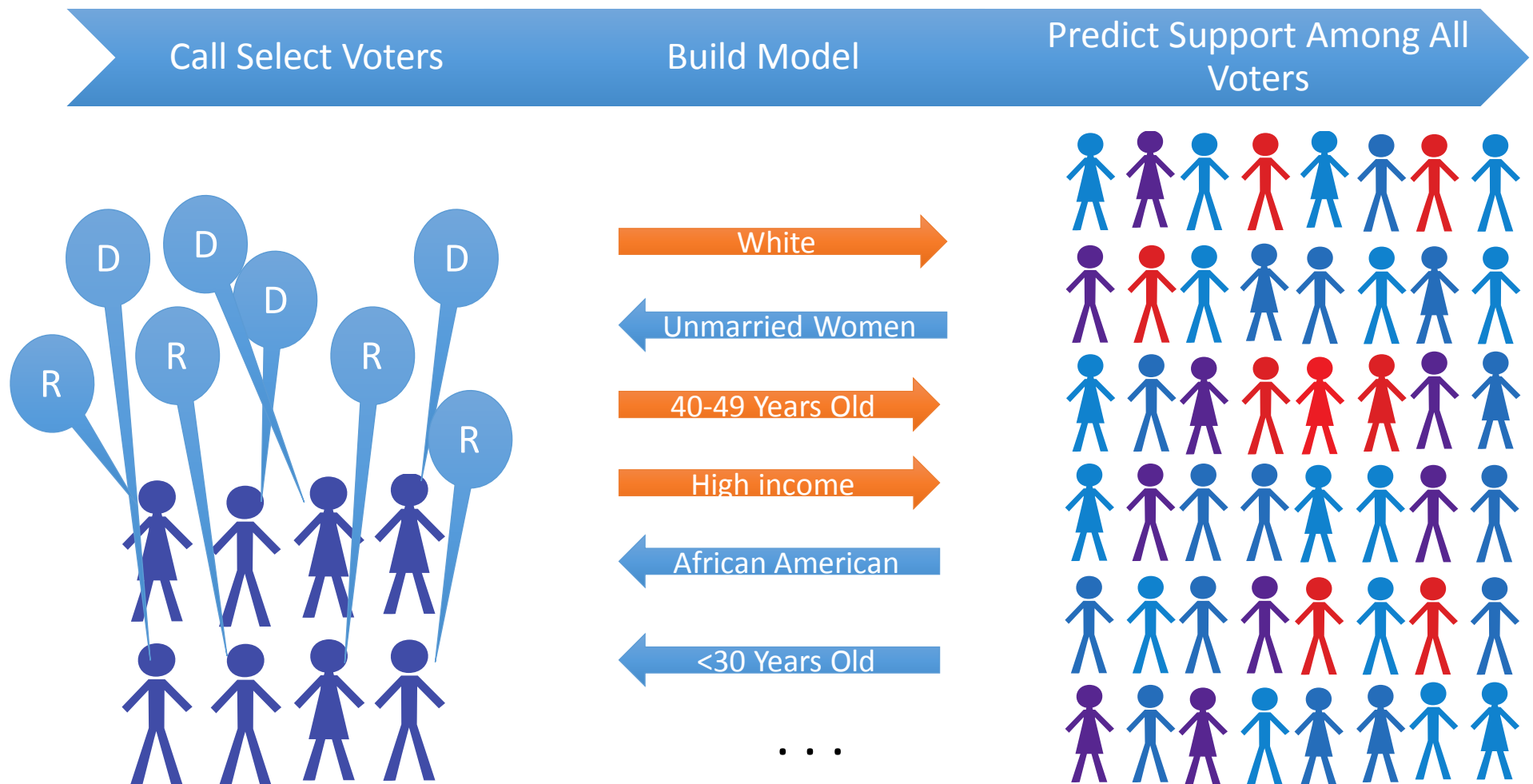
How Predictive Models Work

Modeling is a mathematical process that combines a wide variety of data points on individuals to predict attitudes, behaviors, characteristics, and opinions.



How Predictive Models Work

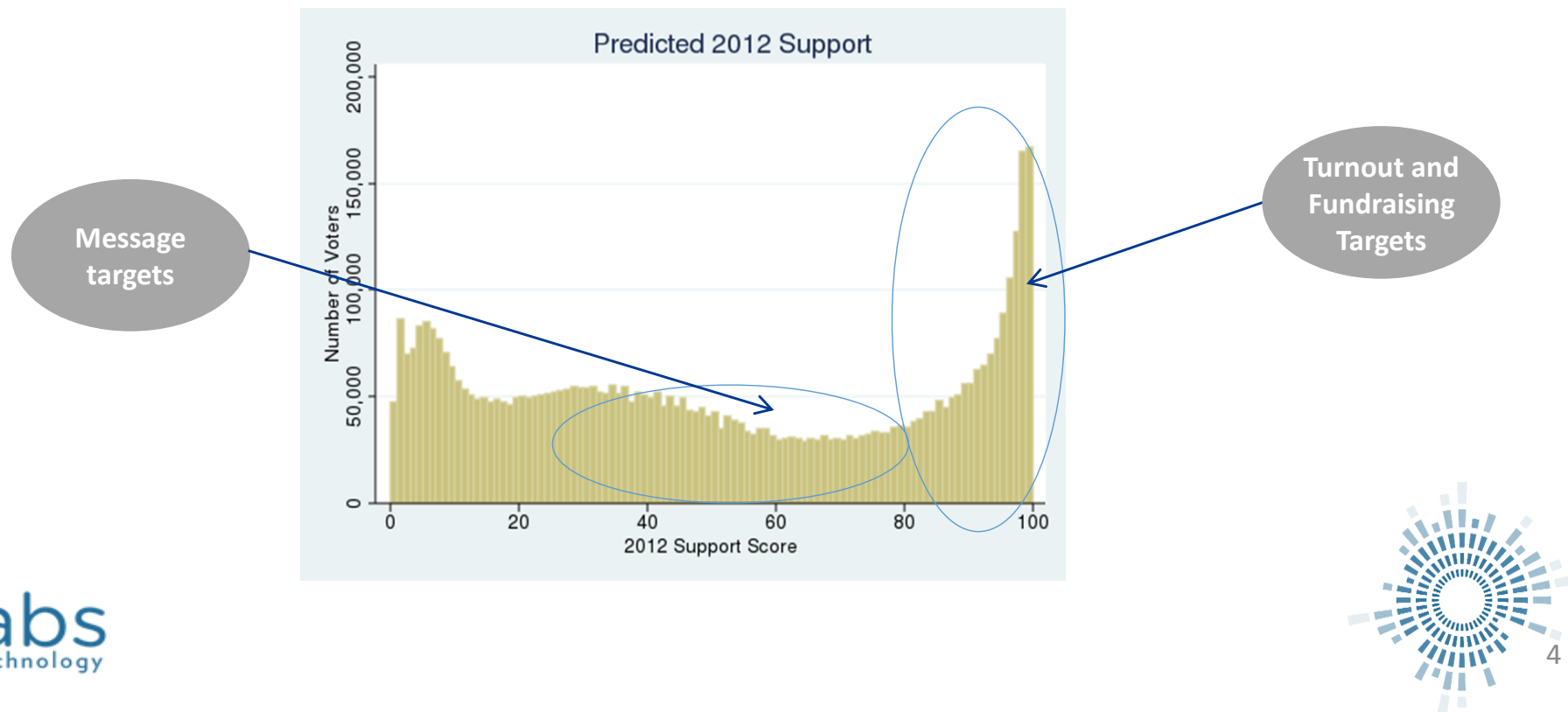
The models produce scores that rank-order each individuals based on her or his likelihood of supporting a candidate/issue or responding favorably to a message.



How Predictive Models Work

Individual-level models allow clients to fully optimize programs: rather than simply targeting broad categories of people, they can focus on the particular individuals with whom our message is effective.

This leads to the best possible allocation of resources.



Types of models

Models can predict numerous behaviors, characteristics, and opinions of individuals, such as:

- **Candidate support** – Who will support a particular candidate?
- **Voter turnout** – Who is likely to turnout to vote?
- **Persuadability** – Whose mind can we change through targeted outreach?
- **Fundraising** – Who are the best targets for direct mail or online solicitation?
- **Issue support**– Who will find a particular issue important?
- **Message Support** – Who will respond favorably to a particular message?
- **Media Consumption** – Who watches TV? Who reads mail? Who uses the Internet?
- **Language** - Who speaks a particular language as their only or preferred language?



How Our Clients Use the Models

If we want to persuade voters to support our message, we must identify those voters, decide what channels we use to reach them, and learn which messages are most persuasive. Analytics and data can help guide all of these decisions.

- For example, if our clients want to promote a particular issue or message in the context of an election, they would target each voter differently:
 - Strong supporters – reminder to vote, volunteer & donate
 - Drop-off voters – persuasive message about voting
 - Swing voters – persuasive messages about an issue
- How can we reach these individuals?
 - Field programs / Direct mail / TV ads / Online ads / Social media





bluelabs
analytics.data.technology

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Volunteer Engagement

Mission

Elect Michelle Nunn U.S. Senator from Georgia on November 4, 2014.

Vision

Engage thousands of volunteers to help achieve the mission.

Values

Focus on Michelle's belief in the power of service and civic engagement, in the power of individuals to create change in their own lives and in the lives of others, to work across differences, to harness the entrepreneurial spirit.

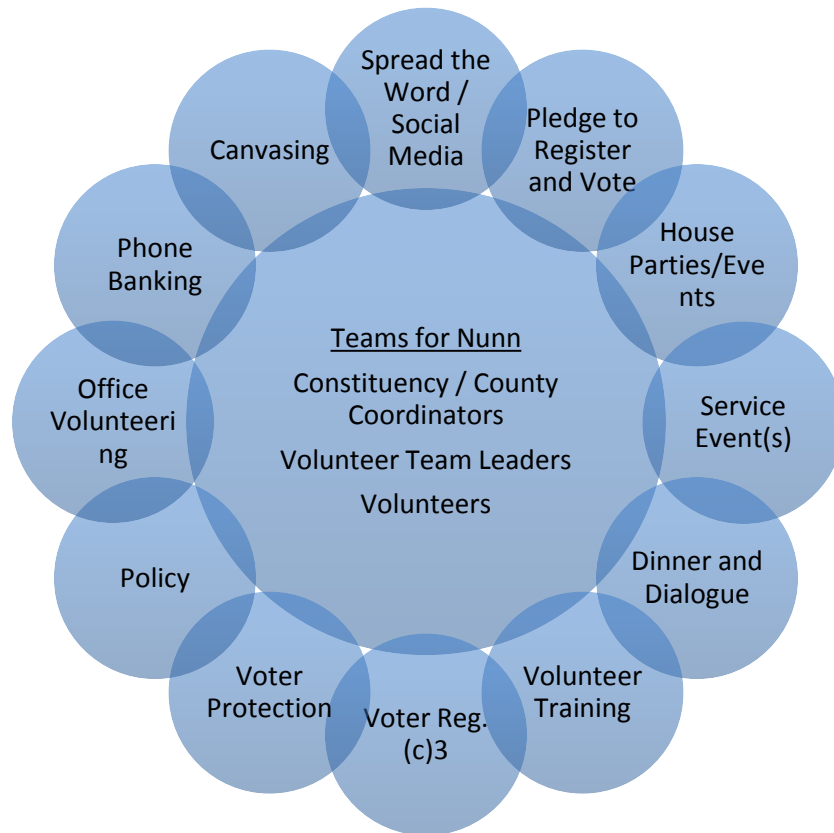
- **Involvement:** Involvement of regular citizens should be a differentiator for the campaign and a guidepost for the experience of volunteers. People should be allowed to be creative and take ownership to serve as a large and powerful driver for mobilization.
- **Service:** The infusion of service and hope into the political process is a different way of thinking about campaigning.
- **Inclusiveness and Diversity:** There is room at the table for all – inclusiveness and diversity – at the core. A person's background doesn't matter. Anyone can contribute no matter how large or how small their contribution may seem to them.
- **Family Friendly:** Wherever possible, campaign volunteering should be family friendly.

Assumptions

- Create a volunteer effort aligned with Michelle's values.
- **Engage volunteers to win**, *not just to engage them*.
- Define ways to engage volunteers prior to the roll out of field operations.
- Design the initial volunteer engagement so that it dove tails into the field campaign.

Strategy

- **Engage** volunteer team leaders to connect small and large groups of people with the campaign.
- **Mobilize voter volunteers** via geographic, demographic and issue groups in the following ways:



Background

- In July of 2013, a volunteer organizing committee was formed and began thinking about ways to engage volunteers in the campaign.
- In August of 2013, the candidate initiated an online volunteer recruitment drive which resulted in the collection of 1,100 volunteers. An additional 475 people reached out to the candidate directly, bringing the initial volunteer count to 1,575.
- In September of 2013, the first volunteer email was sent to the campaign volunteers offering opportunities for them to spread the word about Michelle Nunn's candidacy and to sign up to stay up to speed about the campaign via social media. Additionally, the volunteer organizing committee completed design of the pre-field volunteer infrastructure (i.e. the plan for using volunteers prior to the launch of traditional campaign field activities.)
- In October of 2013, the volunteer organizing committee began recruiting volunteers to fill specific roles.

Volunteer Organizing Committee Accomplishments to Date:

- Developed a plan to engage volunteers prior to the roll out of field operations and designed the initial volunteer structure in such a way as it will dovetail into the field campaign.
- Recruitment and placement of 14 volunteers working full time (or nearly) in staff roles.
- Recruited a full time volunteer serving as the manager of office volunteers.
- Daily engagement of office volunteers at campaign HQ.
- Launched regularly scheduled volunteer orientations at campaign HQ.
- Develop initial “self-organized” campaign volunteer activities and support materials, such as:
 - Development of Dinner & Dialogue House Party Toolkit & Communication (Sent November 2013)
 - Development of Service Teams Volunteer Toolkit. (Scheduled for publication in December 2013)
 - Development of Traditional House Party Toolkit. (Scheduled for publication in January 2013)
- Development of Pledge to Vote Card.
- Launch of Women’s constituency group – Women for Nunn (aka WMN).
- Launch of African American constituency group
- Launch of Young Professionals constituency group (Emerging Leader’s Council)
- Launch of College Student’s constituency group.
- Launch of “Digital Corps/Buzz Team”– team of volunteers sharing Nunn for Senate content in social media.

As we move forward, the volunteer activities will be folded into the field program, where ever appropriate.

IV: Constituency Outreach Plan

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Constituency Outreach Goals & Objectives

Constituency Outreach

The goal of our Constituency program is to engage affinity group leaders and members. Constituency group leaders and members will be asked to both represent the campaign within their constituency and also to work in a targeted way to persuade, ID, and turnout supporters.

Each constituency brings different assets to the campaign. Some are stronger as ambassadors for the campaign to their own members, others are able to raise money and others are helpful in advocating for the campaign in the media.

Goals for Constituency Groups

Each constituency group (listed below) will work to identify and recruit volunteer leaders from across the state to:

- Serve as an integral player in the regional field operation;
- Recruit additional campaign supporters to volunteer for phone-banking and canvassing;
- Endorse the candidate;
- Act as validators within their sub-communities (communities of faith, HBCUs, places of business, community organizations, etc.);
- Serve as surrogates & spokespersons; and
- Support campaign finance.

Staffing

Michael Tyler was recently assigned to constituencies. There are also a number of staff members involved in many of the groups. These staff members include Jessica Kirkwood,

Kendra-Sue Derby, Jeff DiSantis and Kent Alexander to name just a few. Additionally, committed volunteers are in place to provide leadership and administration for some of our constituency groups.

Key Constituency Outreach: Status, Process & Timeline

1. African Americans Community

Given the size, diversity and importance of this community, the campaign will engage the AA community on many different levels. Of special concern is clergy, elected officials HBCU's. This constituency group is critical as the campaign must secure a very high percentage of the African American vote and drive a large number of voters who do not typically turn out in an off election year to the polls. At the time this memo was authored, an African American constituency group has been formed and has met several times.

Active African American Constituency Building Volunteers:

- Tiffany Mack Fitzgerald, Constituency Group Leader
- Hattie Dorsey
- Darryl Hicks
- Chip Morton
- Dr. Victoria Williams
- Ayesha Jeffries
- Sir Lawrence Lee-Conley
- Cheryl Turner

The African American constituency group is working to define ways to generate passion and enthusiasm about this race from within the black community. This group will coordinate with the broader Political team to ensure synchronization in the engagement of African American clergy as well as current and former elected officials, individuals that serve as critical validators in this constituency group. Additionally, they will collaborate with the college student and young professionals constituency groups to engaging younger members of the community.

While it will be important to organize this community as a constituency, the bulk of the voter contact will come through the critical forms of canvassing and phone banking.

Primary Target as a constituency –validators, volunteers and voters.

2. Latino/as Community

While the campaign has identified a core group of volunteers, these individuals have not been connected to the elected officials and other leaders in the community. This community has not been appropriately engaged and needs to be fleshed out. The constituency team will create a cohesive plan by the end of December. Rollout of this constituency is targeted for February. In order to accomplish this goal, the campaign will need to identify the appropriate leadership (December) and hold planning meetings (January).

Targeted Latino/as for Nunn Volunteers:

- Jerry Gonzalez
- Grace M. Lopez-Williams

- Patricia Jimenez-Ronka
- Florence Acevedo
- Lily Z. Winsaft
- Santiago R. Marquez
- Gaurav Bhatia
- Humberto Garcia-Sjogrim

Primary Target as a constituency – validators through all forms of media and volunteer recruitment targeted to Spanish speaking voters.

3. Asian-American Community

While this community isn't as large as Latino/as, it is very tight, works to become citizens quickly and has higher voter participation than many other ethnic constituencies. This is a community more likely to be a fundraising base than some of the others. The campaign will identify appropriate leaders (December) and create a plan (January) for targeted outreach in January and February. Ideally this community will have a media roll-out in March. The first meeting is scheduled for December 18th at 2:00 p.m.

Targeted Asian American for Nunn Volunteers:

- Fabian J. DeRozario
- Andrew Chang
- Amy Phuong
- Farooq Mugal
- Jimmy Kim
- Alok Deshpande
- Wanda Ho

Primary Target as a constituency – fundraising, validators and volunteering in community.

4. Jewish Community

The campaign has identified a handful of dedicated volunteers in the Jewish community to act as a steering committee for all activities. They will be convened in December to create a plan for outreach.

Targeted Jewish Community Volunteers:

- Lori Kagan Schwarz, Constituency Group Leader
- Abe & Linda Schear
- Sherry Frank

Primary Target as a constituency – fundraising and volunteers.

5. Women for Nunn

The Women for Michelle Nunn group is active and well organized. They are reaching out to potential leaders across the state. They are focusing their efforts on volunteer recruitment, house parties for fundraising as well as designing a state-wide rally around Mothers' Day in May.

Primary Target as a constituency – volunteers, fundraising and possibly validators.

Active Women for Nunn Constituency Building Volunteers:

- | | |
|--|--|
| <ul style="list-style-type: none">• Margaret Reiser, Constituency Group Leader / Finance Lead• Liz Mori Lauer, Communications• Spring Wright, Recruitment• Tammy Clabby, Social Media• Daphne Eaton, Events• Betty Londergan, Rally Design• Kim Ferrari, Rally Design• Julie Salisbury, Rally Design• Hala Modellmog, Rally Design• Melinda Ennis, Rally Design• Kelly Dolan• Stephanie Davis | Targeted <ul style="list-style-type: none">• Sherry Frank• Ann Curry• Cathy Harper• Anne Kaiser• Ann Rosewater• Betty Siegel• Allison Kelly Beaton• Carol Jackson• Shelley Senterfitt• Ayesha Khanna• Beverly Tatum |
|--|--|

6. Emerging Leader's Council

The Emerging Leader's Council, an affinity group for 18-40 year-old young professionals, have created a leadership structure with statewide and regional committees and begun the task of recruiting these leaders. Given there are no "groups" representing this cohort, they are able to work without getting into a political quagmire. They have identified their own donor goals and plans for fundraising events. These goals need to be given dates (December) so progress towards goals can be evaluated on a regular basis (ongoing). The volunteer recruitment and mobilization piece of this group needs to be augmented (December). This group is unlikely to be used in an organized press capacity but will be important for showing the continued vitality and youthfulness of the campaign.

Active & Targeted Emerging Leader's Council Volunteers:

- Nicole Leffer, Constituency Group Leader
- Shawn Wilson, Constituency Group Leader
- Justin Tanner, Finance
- Amol Naik, Statewide Development
- TJ Copeland, Vice Chair of Surrogate Engagement
- Adam Harrell, Social Media
- Megan Sparks, Volunteer Training
- Jeremy Berry, Legal

Primary Target as a constituency – fundraising and volunteers.

7. Students for Nunn

The Emerging Leaders were initially representing this group but given how different they are, the 18-27 year old constituency group was divided in two. The campaign is actively identifying at least one leader on all campuses in Georgia and intends to complete this by January 1, 2014. A core strategy group will be designing a plan to implement throughout the state. The current team, listed below, have divided the state into regions and each taken responsibility for recruitment from the colleges within their region. These leaders will be asked to organize their community and recruit volunteers to go into neighboring counties. Students for Nunn will also be handling outreach to high school students to promote voter registration and to secure votes.

Active Students for Nunn Constituency Building Volunteers:

- Andy Ratto, Constituency Group Leader
- Jibran Shermohammed (Emory);
- Alex Rowell (UGA);
- Nick Mizaur (UGA);
- Leia Clement (Emory Law);
- Corey Boone (COS, Young Dems of GA & Tech Alum);
- Levy Malcolm Lyman Barner (Emory);
- Alex Milona (Emory);
- Dre Jones (Valdosta State);
- Maximillian Boykin (SSU);
- Corbin Spencer (SSU);
- Aaron Ware (Clark Atlanta);
- Audrey Davis (SSU);
- Carrie Smith (SCAD);
- Lawrence Lee-Conley (recent alum);
- Maggie Touchton (UGA);
- Malcolm Warren (Valdosta State);
- Trent Gay (Georgia Southern)

Primary Target as a constituency – volunteers.

8. Seniors

This constituency tends to be organized through other constituencies (women, AA, etc.). However, a cohesive plan will be formulated by January 15th in order to identify leveraged opportunities to recruit volunteers.

Targeted Senior Volunteers:

- TBD

Primary Target as a constituency – volunteers and GOTV.

9. LGBT

The campaign is having initial meetings with supporters in the LGBT community to identify the best way to engage. This plan will be drafted by January 15th.

Targeted LGBT Volunteers:

- Vicki Gordon
- Lisa Flick
- David Prophitt
- Edie Cofrin
- Ken Britt
- Mark Kent
- Suzanne Baugh
- Carla Corley
- Mickey Parsons
- Tim Cairl
- Jeff Graham
- Lisa “Lee” Schreter
- Matthew Hicks
- George Johnson
- Drew Plant
- Bob Gibeling
- Reese Adams McCranie
- Robinette Kennedy
- Gale Cowlee

Primary Target as a constituency – fundraising and volunteers for the campaign.

10. Veterans

The veterans community will be organized primarily as validators. The campaign will work to recruit leaders in all areas of the military community and release their support prior to the primary. Following the primary, the campaign will release the names of a larger number of military supporters, thus showing growing support. This release may include a tour of veterans through small communities to highlight the veteran support for Michelle Nunn.

Targeted Veteran Volunteers:

- Vince Farley
- George Shepherd
- John Griffin

Primary Target as a constituency – validator.

11. Teachers

This community continues to be large and hold sway in many areas, however, their position as a validator needs to be examined given the continued assault teachers are undergoing. However, beloved teachers should be recruited as both validators and volunteer recruiters. Many schools encourage students to become active on political campaigns. Teachers are a great way to disseminate information about volunteer opportunities for students. Additionally, many schools have Election Day off – making teachers fantastic volunteers for Election Day. The campaign will rely on the Nunn County Coordinators to identify Teachers for Nunn. In larger counties, the campaign will look to identify leaders within schools and areas. The campaign will work to have at least 10 teacher House Parties per month, beginning in February.

Targeted Teacher Volunteers:

- TBD

Primary Target as a constituency – volunteers and voters with the possibility of fundraising and validators.

12. Farmers

Farmers will be important validators for the campaign, especially in rural Georgia. These individuals will help show Michelle Nunn as a different kind of Democrat. The campaign will recruit leaders through the Nunn County Coordinators and networking with farmers already supportive of Michelle. The campaign will need assistance from the Nunn/Martin family to identify farmers supportive and willing to be public about their support. The campaign will look to recruit the members starting in February with a release of the initial supporters in September, as soon as most of the harvesting is concluded.

Targeted Farmer Volunteers:

- TBD

Primary Target as a constituency – fundraising and validator.

13. Labor

The labor community can provide two valuable resources, volunteers and money.

Targeted Labor Volunteers:

- TBD

Primary Target as a constituency – fundraising and volunteers.

14. Religious Leaders

The faith community is a key component in both the AA community and the Latino community. Leaders need to be recruited and deployed starting in January. The first rollout of leadership should start around the MLK holiday. The campaign will coordinate with key leaders to create templates to be used in all communities. While much of the leadership will begin in metro Atlanta, steering committees will be needed in all of the cities. The campaign will design an earned media program to use religious leaders in op-eds, letters to the editor and direct communications with target voters.

Targeted Faith Volunteers:

- TBD

Primary Target as a constituency –validators.

15. Gun Owners

This group is likely to be rolled out in September or October. It will allow the campaign to create messaging about Michelle Nunn's moderate bona fides at a time when the Republicans are likely to be making her appear like a liberal. Members of this group must have gun/hunting licenses. Depending on the size of the group and their names, this may become a newspaper advertising program or a tour just before hunting season begins.

Targeted Gun Volunteers:

- TBD

Primary Target as a constituency – press.

16. Small Business Owners

Plans for this group will be drafted in January.

Targeted Small Business Owner Volunteers:

- TBD

Primary Target as a constituency – validators for press.

17. CEO's for Nunn

Kent Alexander has been leading this group and is producing a separate memo.

Active CEO's for Nunn:

- Ray Weeks
- Muhtar Kent

Primary Target as a constituency – fundraising and validators for press.

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Press Plan

The Communications Department has 5 major responsibilities:

1. **Enforcing message discipline**
2. **Generating press coverage**
 - a. **In-take**
 - b. **Pitching research**
 - c. **Working With Reporters**
3. **Planning press calendar/executing press events**
4. **Preparing Written Materials**
5. **Oversee email marketing, social media & online**

Enforcing message discipline:

The communications department's first and foremost responsibility is to ensure that the candidate and all parts of the campaign adhere to the message that the senior team has agreed upon. In the zero sum game of elections, resources that a campaign spends advancing a message different from the one that will persuade the most voters is time and resources wasted. In fact – in 21st century campaigns with wall-to-wall media coverage and super-pacs able to put millions of dollars behind video behind a single cell-phone video – a slight deviation from the agreed upon message could end up being very damaging to the campaign.

The political press is not inclined to cover a candidate repeating their message. In fact, many reporters see their job as getting the candidate to “reveal” what their “true” inclinations and orientation may lay or to

cause a gaffe. Any deviation from that message will be newsworthy to them. They also understand that effective candidates and campaigns stick to their message, and will see a deviation in message as an erred campaign or candidate.

These are all reasons why the communications department's number one task is to enforce message discipline.

How does the communications department enforce message discipline?

1) Write and manage the answer section of the Q&A document

The candidate's biggest tool in staying on message is the Q&A document. The document contains the rhetorical tools the candidate needs to navigate every politically tricky question back to message. There are times when the answers may need to be updated depending on shifts in the political landscape, and the communications department is charged with updating this language in consultation with the candidate and the strategic team.

2) Schedule and run Q&A practice with the candidate

The Q&A is only as good as it is internalized by the candidate. It is a document that requires study and practice. It's up to the communications department to schedule time to go over the stump speech.

GOAL: In non-EOQ months, candidate should schedule 1.5 hours of practice each week.

3) Protect (and if absolutely necessary tweak) the stump speech

The nature of campaigns and the importance of staying on message mandates that a candidate have one speech – practiced and rehearsed – that is acceptable to a wide range of audiences that delivers the campaigns message. The candidate does not have time to learn and prepare new speeches and delivering a speech without full preparation 1) does not present the candidate in the best light and 2) risks an inartfully worded phrase or thought that can be twisted to harm the campaign. The communications department is in charge of protecting this speech and ensuring it is delivered by the candidate.

GOAL: Schedule 15 minutes of stump speech critique each week during non-EOQ months during non-call time

4) Approval of all written material distributed by the campaign

The communications department is tasked with reviewing all finance, political, field and policy documents distributed to folks outside the campaign to ensure it is on message.

Interacting With Press & Media

The communications department is tasked with managing all of the campaign's media relationships.

1) Managing press requests

The communications department is charged with managing all requests of the campaign from the media. Every request should be considered on its merits and how it will help or hurt the campaign disseminate its message.

2) Planning/Executing/Staffing Press Events

Being able to interact with the press on the campaign's terms is the most important way campaigns can guide reporters' coverage. That means setting up events that amplify our message. The communications department's job is to drive these events from inception to execution.

GOAL: Weekly press or message events during non EOQ months

GOAL: Every 6 weeks, do one messaged "tour"

GOAL: Visit every media market at least once a quarter

GOAL: Radio interviews before every visit outside ATL (depends on availability of friendly radio)

3) Pitching stories and narratives – both beneficial for the campaign and negative ones against the opponents

Pitching information and scoops to reporters is the lifeblood of reporter/operative relationships. This is almost always spontaneous and hard to plan for – hooks for stories develop based on what's going on in the race and what's being covered at the time. The constant pitching and communications with reporters is also good for developing relationships between the campaign and the press corps that can be leveraged to affect coverage.

4) Responding to unfavorable coverage or getting research hits killed

There will come a time when our opponents are shoveling research against our campaign. Part of the communications department's job (in conjunction with research) is to leverage relationships and find the material to push back against negative research hits. Often we will have fair warning and can work to kill or muddy the story. Sometimes we will get little to no heads up and will be forced to publicly respond to the attack or story.

Planning press calendar

The communications department is in charge of planning the press calendar and executing press events. Unlike message calendars in business and the non-profit world (mostly because political reporting and media narratives are so fluid, and it's almost impossible to predict what will happen over the course of the campaign), these are at best tentative in the short to medium term and speculative after about 5 weeks. But it is helpful to have a framework of what known events to organize around (end of quarter deadlines, third party events etc).

Here are the next 5 weeks:

DECEMBER 2013

Week 2 (Dec 8 – 14):

- Roll Out Entrepreneurship Video Wrap-Up (blast to press, kitchen cabinet, social, trilogy lists)

- Write/place entrepreneurship op-ed – Columbus Journal Enquirer (blast to press, kitchen cabinet, social, trilogy lists)
- Plan for budget compromise failure statement

Week 3: (Dec 15 – 21)

- Continue budget failure messaging
- Begin EOQ swell (trilogy, social)
- Holiday/service press event (Atlanta)

Week 4 (Dec 22 -28)

- Circulate press event coverage (press, social, kitchen cabinet)
- Continue EOQ push
- Holiday/Kwanzaa messaging via social media

- 25th – Christmas Day
- 26 – St. Stephen's Day; First day of Kwanzaa

Week 5 (Dec 29 –Jan 3)

- Continue end of quarter push
- New year, 2014 messaging via social media

- 31st – New Year's Eve
- 31st End Of Quarter

JANUARY 2014

Week 1 (Jan 4-10)

- Peoples Pledge/No superpac agreement press event
- Circulate press coverage (press, social)
- Service teams rollout (trilogy, press, social)
- 7th – Public School begins
- 20 – MLK Day
- 31 – FEC: Year End Report Due

FEBRUARY 2014 – Black History Month

- 2 – Groundhog Day; Superbowl Sunday
- 12 – Lincoln's Birthday
- 14 – Valentine's Day
- 17 – Presidents Day
- 22 – Washington's Birthday

MARCH 2014

GA JJ Dinner (TBD -2nd Saturday) - March 9, 2013

- 3 – Qualifying Period Begins (March 3 – 7)
- 4 – Mardi Gras Carnival Begins

- 5 – Ash Wednesday
- 7 – Qualifying Period Ends
- 9 – Daylight Saving Time Begins
- 17 – St. Patrick's Day
- 20 – First day of Spring
- 25 – Flannery O'Connor's birthday

APRIL 2014-- Autism Awareness Month, Financial Literacy Month

Democratic Primary Debate (Atlanta) - April 2, 2008

- 1 – April Fool's Day
- 5 – Deadline to transmit UOCAVA ballots
- 6-13 – National Volunteer Week
- 7 – Public School Spring Break (April 7 – 11)
- 14 – Passover begins at sundown
- 15 – FEC Quarterly Report Due
- 15 – Tax day
- 18 – Good Friday
- 21 – Easter Monday
- 22 – Earth Day
- 22 – Last day of Passover
- 27 – Holocaust Remembrance Day begins at sundown

MAY 2014 -- Jewish-American Heritage Month, National Stroke Awareness Month, National Bike Month

- 1 – May Day; National Day of Prayer
- 5 – Cinco de Mayo
- 11 – Mother's Day
- 17 – Armed Forces Day
- 20 – Federal Primary Election Day
- 20 – Last Day of Public School
- 26 – Memorial Day

JUNE 2014

- 3 - Shavuot begins at sundown
- 7 – Deadline to transmit UOCAVA ballots
- 10 – Anniversary of the publication date of *Gone With the Wind* (1936)
- 12 – George H.W. Bush's birthday; World Cup begins
- 14 – Flag Day
- 15 – Father's Day
- 28 – Ramadan begins at sundown

JULY 2014

Democratic Primary Runoff Debate - July 29, 2008

- 4 – Independence Day
- 15 – FEC Quarterly Report Due
- 22 – Federal Primary Runoff Election Day

AUGUST 2014

- 4 – Barack Obama's birthday
- 19 – Bill Clinton's birthday
- Public School Begins

SEPTEMBER 2014

- 1 – Labor Day
- 8 – Sam Nunn's birthday
- 11 – Patriot Day or 9/11 remembrance
- 14 – Anniversary of the day Francis Scott Key wrote "The Star Spangled Banner" (1814)
- 20 – Deadline to transmit UOCAVA ballots

OCTOBER 2014 -- LGBT History Month, National Breast Cancer Awareness Month

Televised Candidate Forum (Atlanta) October 16, 2008

Televised Debate (Albany) October 20, 2008

- 13 – Columbus Day
- 15 – FEC Quarterly Report Due
- 31 - Halloween

NOVEMBER 2014

- **4 – Federal General Election Day**
- 11 – Veterans Day
- 22 - Deadline to transmit UOCAVA ballots
- 27 – Thanksgiving Day

Preparing Written Materials

The communications department is tasked with writing talking points, speeches, op-eds, press releases and other materials delivered to the media. When appropriate, the communications department will work with members of the volunteer pool to develop initial draft of longer projects.

GOAL: Engage volunteer writing corps twice a month

GOAL: Press release after every public event

GOAL: Monthly op-ed placement

Fundraising Email Blasts and Social Media

The communications department is charged with working with Trilogy to guide fundraising email blasts through the internal approval process and to loop them in on the message calendar. It's also tasked with

creating content for social media in the candidates' voice. The communications department is also involved with creation of website 2.0.

GOAL: Trilogy emails (2-3 a week... more or less depending on needs)

GOAL: MN Facebook post (3-4 each week, maybe more depending on content)

GOAL: MN Tweets (daily)

GOAL: Campaign/Volunteer spotlight blog on 2.0 site (2-3 times a week)

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: The Research Plan/Department Goals & Objectives

The Research Department is responsible for compiling and preparing for use all available information on you and your opponents. The staff has four primary tasks:

- 6. **Opposition Research:** Public record research on all possible opponents.
- 7. **Candidate Research:** Public and internal records on you, your accomplishments and your vulnerabilities.
- 8. **Monitoring:** Keeping track of candidates’ statements and positions for use during the campaign.
- 9. **Fact Checking** to ensure that our statements are factually correct.

Below is a grid of the planned activities of the Research team. It outlines an aggressive strategy to finish the urgent “pushback research” (that will drive our responses to potential Republican attacks) by the end of January and any remaining background research on Michelle by the end of February. The opposition research, currently largely being handled by the DSCC, will be complete by the end of Feb.

NUNN RESEARCH		
	Time	Assigned
OPPOSITION RESEARCH		
Books		
Perdue	Mid-Dec.	DSCC
Handel	End of Feb.	DSCC
Kingston (collection, votes)	End of Jan.	DSCC
Broun (collection, votes)	End of Jan.	DSCC
Gingrey (collection, votes)	End of Jan.	DSCC

Clips (Kingston, Broun, Gingrey)	Mid-Feb.	DSCC
Application of DSCC Research		
All candidates	TBD	campaign
Top Hits Memos (will be updated again after books)		
Perdue/Handel	Dec. 20	campaign
Kingston/Broun/Gingrey	Dec. 13	campaign
Gingrey (collection, votes)	Dec. 13	campaign
Tracking	ongoing	campaign
MICHELLE NUNN RESEARCH		
Identification of Vulnerabilities	End of Feb.	campaign
Follow-up interview w/candidate, staff	TBD	campaign
Pushback documents		
Points of Light	Dec. 30	campaign
Bio/personal	Dec. 30	campaign
Issues	Dec. 30	campaign
Positive documents		
Points of Light	Jan. 15th	campaign
Other	Dec. 30	campaign
Top Hits	Dec. 25 th	campaign
Rapid Response	as needed	campaign
Validators	TBD	campaign
Vetting	as needed	campaign
DEBATE PREP		
GOP Primary		
Releases(?)	one week prior	campaign
Dem. Primary		
Debate prep	30 days prior	campaign
Releases(?)	one week prior	campaign
Gen. Election/Mock Debate Practice		
Debate book	3 mon. prior	campaign
Releases(?)	one week prior	campaign
MEDIA MONITORING		
Daily Monitoring		
News clips (all)	as needed	campaign
Clip books (GOP)	daily	DSCC

I. OPPOSITION RESEARCH

GOP Research Books

The research department at the DSCC is writing research books on the five frontrunners in the GOP primary. Most of the initial work will be performed by DSCC staff in Washington. They will also be sending two associates to Georgia in to conduct on-the-ground collection (including visiting courthouses, state archives, etc.) for all five candidates in mid-January.

The campaign will supplement the DSCC's work when we identify a need to produce research earlier than the deadlines outlined above and when we determine follow-up items need to be produced.

Deadline & Deliverables:

- Perdue (full book, excepting collection): early December
 - Kingston/Broun/Gingery (just votes and collection): end of January
- Handel (full book): end of February

GOP Research - Daily Monitoring

In conjunction with ongoing background research, the DSCC and the campaign are monitoring each of the Republican candidates on a daily basis (for more on this monitoring, see Media Monitoring, below).

Our campaign's research team will continually analyze these records to look for information to highlight to members of the press. Given the importance of the primary to our ability to win in November, we view this as a high priority for the Research (and Communications) staff. In all probability, the GOP candidates lack the capacity to scrutinize each other this closely, so it will fall to our campaign to highlight electorally important comments and positions.

Deadline & Deliverables: The DSCC maintains running “clip books” on each of the candidates that are updated each day and sent to the campaign. The campaign maintains an archive that includes all print and TV pieces relevant to our race.

“Top Hits” Memos

Top hits memos are short documents detailing the major vulnerabilities for each candidate that are used for polling, paid messaging, and by our communications staff when briefing reporters and writing message documents. Early versions of these documents were drawn up by the DSCC last spring for everyone except Perdue. While some work has been done since then for specific stories, they have not been comprehensively reviewed and updated with new information in several months.

Deadlines & Deliverables: By Dec. 20th, the Research staff will have updated “top hits” memos for review, with vulnerabilities that are attractive to primary, general election, and fundraising audiences. Moving forward, we will update these documents as research books are completed.

GOP Research – Application

The campaign's research team in Georgia will also be responsible for applying the DSCC's research. While the DSCC will provide us with information about the vulnerabilities of each of the GOP candidates, it will be our responsibility to build out those vulnerabilities into narratives that we can pitch to members of the local or national press.

While polling and the dynamics of the race will determine which candidates and topics receive the bulk of our attention, a significant portion of our time will be spent working with Nathan and our media team to ensure that these narratives make it into the free press.

Deadlines & Deliverables: TBD, based on research produced by the DSCC. Application will be driven in part by the news of the day, and in part by the needs of the campaign.

Tracking

The Democratic Party of Georgia currently employs a tracker (funded by the DSCC) whose sole responsibility is to monitor the Republican candidates and get them on film as often as possible. This includes town halls and similar public events, but also fundraisers, party functions, county fairs, etc. This footage is transcribed by the tracker and uploaded to a shared server that is accessible by our staff, our media team, and the DSCC.

Each day, we review these transcripts for vulnerabilities and archive useful quotes for use later in the campaign. This footage also frequently provides a preview of "coming attractions" -- campaign themes, expected attacks, even upcoming ads frequently make it into a candidate's remarks before hitting the air.

Deliverables & Deadlines: By December 15th, the tracker will compile a list of scheduled events (e.g. county GOP meetings, major annual gatherings, etc.) for the duration of the primary. This will allow us to proactively reach out to event organizers to determine if any of the candidates plan to attend and to plant questions when appropriate.

Democratic Primary

Currently, there is no plan to conduct in-depth candidate research on any of the other Democratic candidates for Senate. Of Nunn's four declared opponents, only Branko Radulovacki and Steen Miles appear to be actively campaigning. The others, Todd Robinson and John Coyne are candidates in name only.

Deadlines & Deliverables: In the event of scheduled primary debates, this may change (see Debate Prep., below).

II. SELF RESEARCH SCHEDULE

Identification of Vulnerabilities

The research firm NewPartners completed an initial overview of Michelle's record. Within that document, they have pointed out several areas of potential concern in her record (see "Pushback Documents" below). After reviewing that document and Michelle's record, we have identified several areas that warrant follow-up research. These include:

- Lobbying/legislative advocacy by Points of Light
- Corporate 'whitewashing' at PoL
- Records related to two EECO complaints identified by New Partners
- 990s for HandsOn Network/Atlanta (pre-2001 for HoA, HoN from 2005)
- Notable line items in existing 990s
- International grantmaking

It may also be necessary to conduct follow-up interviews with the candidate and/or members of her inner circle, particularly to fill in details about Points of Light.

Deadlines & Deliverables: The Research staff will complete research and any necessary pushback on the documents above by the end of February. Interviews will be scheduled as required when time allows.

Pushback Documents

The Research team will produce a "pushback" document for each identified vulnerability in Michelle's record, as well as common attacks frequently leveled against Democratic Senate candidates.

These will be prepared as early as possible and will serve as the basis for our response when attacks are leveled against Michelle. Some, such as the document relating to Michelle's conservation easements, are complex and lengthy; while others will be short "fact checks" pushing back against common distortions (e.g. "Obamacare cut \$500 billion from Medicare).

Points of Light

- Grants to problematic entities
- Layoffs
- Liens (POL)
- POL audit/IG report
- Travel packages investigation
- service awards to inmates, terrorists
- Nunn's salary

Bio/Personal

- Nunn is too liberal
- Nunn is a rubber stamp for Democrats
- Nunn is Obama's/Harry Reid/Nancy Pelosi Best Friend
- Nunn is not a 'real' Georgian
- Nunn is a lightweight
- Conservation easements

Issues/Legislation

- Serve America Act
- Healthcare/Obamacare
- Gay Marriage
- Guns
- Cut Medicare/Social Security
- Syria

Deadlines & Deliverables: The Research staff will prepare pushback documents on these issues by the end of January. Additional documents will be produced as necessary.

Positive Documents

Part of the story of Michelle's candidacy is the story of her accomplishments throughout her career, especially the story of the non-profits she founded and led. We will build on the work of NewPartners to highlight these success stories -- both through metrics like funds raised and dollars spent -- but also anecdotally through stories that appeared in Atlanta's newspapers during the past two-plus decades.

Positive narratives about the candidate include:

- Accomplishments at Points of Light
- Bipartisanship
- Record of working with businesses

Deadlines & Deliverables: By the end of February, the Research Department will create an expanded positive document about Michelle's work at Points of Light. Other positive narratives will also be completed by that date.

Top Hits

Similar to the “top hits” document on the GOP candidates, the Research staff will also create a top hits document that details Michelle’s vulnerabilities for polling and ad testing. This will largely draw on NewPartners book, but also include new research and attacks already leveled by the GOP against Michelle.

Deadlines & Deliverables: By Dec. 25th, the Research staff will have updated “top hits” memos for review, primarily geared toward a general election audience; but also containing possible avenues of attack from the left.

Rapid Response

As the campaign heats up, the GOP candidates will begin to level attacks against Michelle. For each attack, the research department will prepare a "side by side" -- a document refuting the attack point by point and providing our campaign with the information necessary to respond.

Many of these documents will never be used, as the campaign will frequently ignore these attacks. Others will be used only by our Communications staff and surrogates, while a few will form the basis for comments by the candidate.

Deadlines & Deliverables: As needed; documents produced within a few hours of the attack & distributed to the team.

Validators

We will identify key leaders in the community – validators -- outside the campaign who can be deployed in the event we come under criticism. Ideally, these individuals would be quoted by name in the press and be willing to contact members of the press in concert with our message. Particularly important will be identifying individuals from Points of Light who can speak to Michelle’s record when necessary.

Deadlines & Deliverables: The research staff will work with Michelle and her political staff to assemble a list of these individuals by January 15th.

Vetting

The Research Department is responsible for vetting all communications put out by the campaign, including paid communications, emails, speeches, op-eds, etc. This vet includes three main components: a fact check, a check of Michelle’s previous statements, and an assessment of any political vulnerabilities. Research will sign off on the final version of all the campaign’s communications; and, for paid media (mostly TV ads) will prepare a side-by-side document backing up every claim made in the ad.

The Research Department will also vet individuals with whom the campaign associates -- most frequently for events and site visits. This vet includes a check for criminal records, "bad news" stories, and inflammatory statements that could reflect poorly on the campaign.

Currently, there are no plans to vet donors to the campaign.

Deadlines & Deliverables: As needed.

III. DEBATE PREP

General Election & Dem. Primary Debates – Michelle Nunn

As the repository for information on each candidate's positions and vulnerabilities, the Research staff will play an active role in Michelle's debate preparation. Working with Ron Klain, our Debate Lead, the Research staff will create briefings and prep questions and mock scripts for debate prep sessions.

Approximately 3 months before we expect debates to begin (or one month before Michelle begins debate prep, whichever is sooner), the Research staff will complete a first draft of her "debate book" (containing briefing materials, suggested answers, attacks, and rebuttals) for review by the entire team. We are considering "mock practice debates" to coincide with Republican Primary debates. If this option is finalized, we will finalize the preliminary debate book a month before the first mock debate.

Should primary debates be scheduled, all materials required by Ron will be prepared and provided to the debate team.

Deadlines & Deliverables: Per Ron Klain, all materials will be provided in a timely manner and in advance of practice sessions.

GOP Primary Debates – The Republican Candidates

The Research staff will monitor the GOP primary debates and be prepared to highlight inaccuracies or politically relevant exchanges for the Communications staff. The staff will also prepare information for rapid-response press releases to be sent out from the party during or following the debate.

Deadlines & Deliverables: Releases on relevant candidates/topics will be completed for review one week prior to debate.

IV. MEDIA MONITORING

Print/Online News clips

Daily Clips:

Every day, our media monitor will send around news clips as they appear online to a small group of leadership, communications, and research staff. These clips will include traditional newspaper stories, as well as blog posts, online articles, press releases, campaign emails, etc. These will be sent individually and in as close to real time as possible.

TV/Radio Clips

We have a television monitoring service called TVEyes.com that tracks local broadcasts in every Georgia television market. Working with the DSCC's research team, who are monitoring the media appearances of Republican candidates, our media monitor will send around a daily clips digest each afternoon that includes all mentions of Michelle or our GOP opponents.

For the benefit of our media consultants, video of each clip will be saved by the DSCC (for the GOP candidates) or by the campaign (for clips that include/reference Michelle).

Note that for radio –while almost every station simulcasts online, we will largely need to rely on social media and the stations themselves to gather information about when our opponents will be appearing on talk radio.

Deadlines & Deliverables: Daily.

VII: Policy Plan

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: The Policy Plan/Department Goals & Objectives

The policy director and the policy team of the Nunn for Senate campaign are responsible for the development of policy materials for use by the candidate and the larger campaign.

POLICY TEAM AND STRUCTURE

The policy director convenes a “kitchen cabinet” of individuals including Senator Nunn, Norman Underwood, Stacey Abrams, Andrea Young, Andrew Feiler, Charles Campbell, David Edwards, Gordon Giffin, Valeria MacPhail, and Rocky Rief on a weekly basis to provide the campaign with guidance on a variety of policy topics. The agenda is set by the policy director on Friday and participants are provided with relevant background materials. The call is then summarized for the larger campaign leadership and the candidate.

The policy director, with the assistance of Andrew Fielder and David Edwards, calls upon the support of dozens of volunteer policy experts providing background, research and strategic memos on issues of importance to the campaign. Please find the list of volunteers and their issue expertise in Attachment “A”.

POLICY PRODUCTS & PROCESS

- 1) **Event memos (Internal)** – these are short policy background pieces tailored to an event, meeting or fundraiser. They are produced by the policy director and reviewed, when possible, by the research director. The need for these memos are identified on the Friday scheduling call, produced by the policy director and will be provided to the candidate 48 hours prior to the event.
- 2) **Background Policy Memo (Internal)** – there are longer-form documents and are intended to inform the candidate on a particular issue. They are produced proactively by the policy director and fact checked by the research director in anticipation of the array of issues likely to emerge over the course of the campaign. They include facts pertinent to both Georgia and the US and relevant background with pros and cons on specific controversies.

The policy director is responsible for the production and upkeep of the candidate's issue binder which will include copies of these background memos, tabulated by topic.

- 3) **Questionnaires (External)**: Completion of questionnaires as directed by Jeff or Monica. Questionnaires are reviewed and approved by Research Director.
- 4) **Policy Positions (External)**: One Page Issue Papers/Paragraphs/Language on Policy provided to supporters to explain Michelle's position on an issue. The policy team will draft position papers for editing and review by the communications team. Research Director will provide final sign off on all papers.
- 5) **Requests From Candidate**: The Policy Director provides the candidate with factual information or policy analysis needed per her request.
- 6) **Library/Repository**: The Policy Director will keep and manage articles, quotes, statistics and other material identified by the candidate or others in relation to specific policy topics. These materials are compiled and archived for possible use over the course of the campaign.
- 7) **Background on Emerging Issues**: There will emerge issues on which the candidate will have to comment or take a position. As these arise, it is the policy director's responsibility to provide the political team and the candidate with the relevant policy background on the issue at hand and a summation of the opposing points of view. We will also re-prioritize background memos based on these emerging issues, as we are doing with: the ***Affordable Care Act, Iran sanctions, the federal budget and the sequester, immigration reform, minimum wage, expiring tax provisions, etc.***

POLICY WORKPLAN

1. **Background Policy Memos**: Those in bold are complete or are near completion; otherwise, due dates for completion of these documents are noted:

- **Agriculture**
- Banking – January 1
- Budget Issues – December 15
- Civil rights, especially voting rights – January 1
- Energy – December 15
- Environment – December 30
- Entitlements including Social Security, Social Security disability and Medicare – February 1
- Good Government Issues: transparency, ethics, campaign finance reform, Congressional oversight, Congressional reform, government waste and over-regulation – February 1
- Health Care – possible fixes to the Affordable Care Act – December 15
- Infrastructure – March 1
- International Affairs: **Syria, China, Russia, violent non-state actors**, etc. – January 1
- Iran Sanctions – Congressional Legislation – December 15
- **Immigration**
- Labor Issues: Minimum Wage, card check, trade policies, OSHA reform, immigration, etc. – January 15
- National Security:
 - o Guantanamo Bay – January 15
 - o **Sexual Assaults in the Military**
 - o **NSA**

- Rural Issues: economy, health, education, infrastructure, housing – March 1
- Trade – March 1
- Unemployment Benefits – December 15

Priority for Completion-Background & Web	Rank
Budget, Deficits, Debt	1
Healthcare reform - ACA fixes	2
Jobs, Growth, Unemployment, poverty	3
Energy	4
Iran Sanctions 2.0	5
Environment	6
Women and family	7
Defense/National Security	8
Banking/Financial Reform	9
Civil Rights/Voting Rights	10
International Affairs	11
Agriculture	18
Labor Issues	13
Guantanamo Bay	14
Entitlement Reform	15
Good Government	16
Tax Reform	17
Startup Policy	12
Trade	19
Infrastructure	21
Rural Issues	22

2. **Policy Positions** –Currently, we have vetted and make public on the website four position statements: fiscal issues, education, veterans, and jobs and the economy. We have also approved language for use on: choice, church and state, and Israel. The next set of public issue positions we working on are:

- Women's Issues – December 20
- National Security – January 1
- Agriculture – January 15
- Tax Reform – February 1
- Startups and Innovation – February 15
- Good Government – March 1

Other possible policy rollouts and/or enhanced website content:

Jobs and Opportunity– We have a strong working framework on this issue on the web but we could dig deeper and produce solid, specific policy proposals to address wage gaps and income mobility, to attract manufacturing jobs, and to align government tax and fiscal policies with innovation and investment, especially for women- and minority-owned businesses.

Education – Similar to the jobs and economy policy work, our education platform needs more depth, more Georgia specific stats and stories, and a greater emphasis on education-to-work strategies such as apprenticeships. We should also highlight what she has been saying on the role of national and community service in the education arena in a more visible way.

Healthcare- One important decision for the campaign in the coming months will be whether we will articulate a comprehensive health care policy position (inclusive of ACA but not exclusive to the Act) or whether we will remain reactive to ACA. For instance, can we give Michelle a smart set of policy recommendations that address issues of coverage and cost but also include a focus on areas of interest to her including health care innovation, deregulation and mental health?

3. **Questionnaires:**

Completed and submitted questionnaires:

- Tri State Maxed Out Women's PAC
- The Women's Political Committee
- The National Women's Political Caucus
- Planned Parenthood
- The Human Rights Campaign

On Deck and In Progress:

- AFSCME: Ready for Michelle
- Teamsters: Ready for Michelle
- NOW: Completion expected by December 15
- Women's Campaign Fund by December 15
- Sierra Club by January 1
- National Committee to Preserve Social Security and Medicare by January 15.

ISSUE (with Policy Expert/Volunteer)	SUB ISSUES
Agriculture (Bill Bolling, Sen. Stabenow, UGA) (Grant Leslie-Glover Park)	Farm Insurance SNAP food stamps Conservation Reserve Program
Banking/Financial Reform (Mary Goodman)	Banking Wall Street Reform Start Ups
Budget, Deficits, Debt (Tom Cunningham) (Bill Bixby, Concord Coalition) (Rocky Rief) (Matt Weiss)	Fiscal policy Monetary policy Balancing the Budget Simpson Bowles potus budget ryan budget fiscal cliff
Choice (Stephanie Davis, Pam Sugarman)	
Civil Rights	LGBT Voting Rights Privacy Tort reform ERA disabilities (Adam Hinchliffe)
Crime and Guns (BJ Bernstein)	incarceration
Defense (Arnold Punaro) (Sam Nunn) (CSIS)	NSA (Nancy Libin) Gitmo (Wells Bennett) NDAA
Education (John Gomperts) (Steve Dolinger, GPPE)	Early Childhood K-12 Workforce Development

(Robert Ryschke)
(Laura Slover) & (Neil Shorthouse)
Dena Blank

College Access

Energy

(Kevin Kelly)
(Mandy Mahoney)
(Steve Leeds)

Fracking
EPA

Entitlements

Social Security
Medicare

Environment

(Kevin Kelly)
(Anne Riederer)
(Rachel Jacobsen - Fish and Wildlife)

Water wars
Coal Fired Plants
Keystone

Government/Waste/Campaigns

(Will Marshall)
(Abhi Nemani)
(Catherine Bracy)

Campaign Finance
filibuster
judges

Gun Control

Health Care Reform

(Cindy Zeldin)
(Laura Good)
(Alan Essig)
(Arun Mohan-Emory)
(Paul Terry)
(Toby Cosgrove - Cleveland Clinic)
(Monica Eischen-CDC)

Cost containment
ACA
mental health

Housing

freddie and fannie
foreclosures

Immigration

(Helen Kim Ho)
(Erin Elwood)

Senate Bill
Impact on Start Ups

Infrastructure

(Doug Hooker) & (Chuck Meadows)

Transportation
water wars (Kevin Kelly)
harbor deepening (Bob Hurt)

Int'l Affairs

(Parsa Fattahi)
(Sam Nunn)
(Bernie Aronson)

Arab Spring
Syria
Iran
China
Afghanistan
Israel (Mark Bernstein)

Jobs, Growth

(Mac Holladay)
(Tom Cunningham)
(David Sjoquist)
(Alan Essig)
(Greg Giornelli)

debt & job creation
regulations
entrepreneurship
minimum wage
poverty
R & D (Carlos Moreno-Emory)

Labor Issues

Latino Issues

(Pedro Marin)
(Susana Chavez)
(Luz Borrero)

LGBT Issues

(Jeff Graham)
(Ken Britt)
(Cathy Woolard)

Poverty/Community Devel.

(Greg Giornelli)

Anti-Poverty agenda
Housing
Urban Development

Prison Reform

Andrew Gelb, Pew

Small Business, Start Ups

(Josh Kimball)
(Jeff Levy)

Tax Reform *

(Fix the Debt, Concord Coal., PPI)

Tax expenditures

Trade

(Kent Harrington)

Trial Lawyers

(Bill Clark)

(BJ Bernstein)

Veterans

(Arnold Punaro)

Women and family

(Pam Sugarman)

(Stephanie Davis)

(Pat Willis)

(Mindy Binderman)

Pay equity

Violence Against Women

IX: Finance Plan

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Campaign Finance Plan

Overview

The candidate and finance team have a heavy lift over the next 10 months and will need to take what was learned from the last two quarters as the foundation for raising a combined \$18 –20M total for the campaign. The plan articulated in this memo strives to fully leverage what has been successful so far, to learn from where we've fallen short by either making changes or deemphasizing those areas (or doing both), and to put structures and processes in place that allow us to fully take advantage of the momentum and fundraising opportunities that will undoubtedly be created once the race heats up. Hitting our targets will require us to prioritize fundraising above all else and to focus the candidate's time on it with relentless intensity. It will also require leveraging all of the many assets we have as a result of Michelle's network.

The plan also attempts to lay out a strategy that embraces both following "the recipe" from tried and true campaign plans and infusing some of the creativity and innovative spirit that reflects the candidate. Hitting this balance is what will make the difference between a successful effort and a wildly successful campaign that exceeds goals and breaks new ground. It will mean we'll make mistakes, but we'll have timely data so we can course correct as we go. We will also need the buy in and confidence of the candidate to understand that while she may not be entirely comfortable with the tried and true methods of campaign fundraising, they work and to a degree, are required by the short and fast pace of a multi-million dollar political campaign. It will also be incumbent on the fundraising team to adjust to the strengths of the candidate as we go.

Assets, Opportunities and Challenges

Assets and Opportunities

Michelle Nunn as a candidate for U.S. Senate is in many ways a fundraiser's dream. Her network is phenomenal, she is a thoughtful and inspiring communicator, her authenticity and integrity are unmatched, she's smart, pragmatic, and she is fiercely competitive. She also has the benefit of being a woman at a time when female senators and candidates are doing

extraordinarily well in terms of voter perception and donations.

(<http://www.nytimes.com/2013/11/30/us/politics/as-women-build-political-power-a-fund-raising-tide-turns.html>)

Michelle has national connections and relationships that most candidates could never convene, from Warren Buffet to General Electric CEO Jeff Immelt to Usher. Senator Nunn's reputation and rolodex are a treasure trove from his four terms in the U.S. Senate, his leadership with the Nuclear Threat Initiative and Center for International and Strategic Studies, and his participation on numerous corporate boards, and Colleen's lists and connections are renowned both for their accuracy and being a "who's who". Michelle has also assembled her own national following over the last two decades and it's a group that spans both corporate and nonprofit sectors, many of whom are already excited about her candidacy. Maintaining accurate data on this inner circle and effectively engaging them may be the most lucrative single asset of the campaign (other than the candidate) because of the capacity, power and bipartisan reach of this group.

As a communicator, Michelle has honed her skills as CEO of Points of Light, and become an accomplished speaker with the ability to inspire a group of five or a crowd of five thousand. Though it is not a talent she relishes, she has a real gift born out of her personal drive to connect with people, to say something meaningful and relevant, and her authenticity. People who hear her speak connect with her. They find her smart, insightful, and engaging. Part of our success will depend on having as many people as possible hear her, and getting creative about how that's accomplished both through campaign fundraising and our communications strategy.

Giving donors and voters the opportunity to see Michelle's grasp of the issues, her intelligence, and her sensible nonpartisan approach to problem solving will be essential to bringing in new donors, particularly those who may be typically Republican, but frustrated and looking for a change, and those who give/vote based on their issue. This has not been so critical in the first two quarters since we have primarily been raising funds from people who know or are connected to people who know Michelle. While we will continue to win people over through her bio, we will also want to appeal to folks and keep them engaged because of her positions and approaches to critical issues. We will need to coordinate the communications and fundraising strategy in terms of timing, audience/issue priorities, and messaging.

Additionally, there is also a growing sense of excitement nationally and within the state that Georgia could turn blue in 2014. There is growing concern that the party could be in danger of losing its majority position in the Senate, so this race will likely draw national attention and national money as things heat up and this becomes a key pick up race. Having Jason Carter added to the 2014 ballot has also increased interest and excitement that is energizing the state party, hopefully donors and voters will follow. Implications of this will largely impact the campaign closer to the election, based on media and advertising.

Finally, there is the opportunity associated with the mudslinging that invariably seems to come with campaigns these days. There are two major strategies to consider here that cross over between finance, political strategy, and communications: running a clean campaign (implications of proposing and signing a "no IEs agreement" and being prepared to use the attacks against Michelle to raise even more money.

Challenges

Timing. While it is outside of our control, the perception exists that a Democrat cannot win Georgia, and will certainly keep some donors from coming in until late in the race. Consistent messaging that this is a winnable race will continue to be important in all fundraising

communications, backed up whenever possible with polling and voter turnout data. While we are working to ensure strong revenue across every quarter, the cash is likely to skew heavily toward the last two quarters.

Data Management. The finance team is dependent on the effective use of NGP. There are currently challenges in timely and accurate reporting of contributions by source. This reporting will be critical to managing cash flow and keeping the senior team apprised. We need to determine a work around for the lack of integration between Trilogy and NGP so that we have more confidence in our targeting and reporting capabilities. Additionally, the finance team needs to reaffirm and follow its own data protocols, and complete the rolodexing process with the candidate so that the extensive network mentioned above can be effectively tracked and engaged.

Staffing. The last 8 weeks have been a period of evaluation and development of a team structure designed to utilize the strengths of the team members and volunteers already in place. The structure also needs to align with the goals of this plan. During this time, we have had one paid and one volunteer team member transition out (both moving out of state to pursue other career opportunities that included higher salaries). These transitions, the need to staff up even before these transitions, and the need to staff the Victory Fund, have combined to leave the finance team somewhat short staffed. Both team members who left had strong NGP experience which needs to be replaced.

Finance Committee. While we have a terrific Finance Committee with pledges to raise totaling nearly \$2M, we need to do a better job of confirming these pledges and motivating and equipping them to meet their commitments.

2013-2014 Cycle Fundraising Goals

The plan below provides a broad overview of projected goals for the year that we will continue to revise. These goals will be reviewed in a finance team planning session in early January with national fund raising consultants, and will be updated if needed immediately following those meetings. In general, the stretch goals are in the events line, both national and in state. In order to keep it simple, “high”/ “low” scenarios are not included here, but these numbers should be viewed as having about a ten percent swing either way until we more fully map out the events strategy supporting them.

	<u>Year End Total</u>	<u>Q 1 Total</u>	<u>Q 2 Total</u>	<u>Q 3Total</u>	<u>Q 4 Total</u>	<u>Campaign Total</u>
	Proj	Proj	Proj	Proj	Proj	Proj
Candidate Calls/Visits	\$495,835	\$125,000	\$150,000	\$185,000	\$75,000	\$662,800
Raisers	\$339,666	\$400,000	\$450,000	\$450,000	\$400,000	\$1,914,061
In State Events	\$770,674	\$675,000	\$750,000	\$650,000	\$600,000	\$3,030,199
National Events	\$802,611	\$850,000	\$950,000	\$1,350,000	\$150,000	\$3,835,745
Direct Mail	\$0	\$0	\$0	\$0	\$0	\$0
Resolicitation Mail	\$0	\$32,128	\$101,920	\$187,985	\$82,150	\$404,183
Internet	\$547,826	\$320,750	\$392,000	\$1,013,000	\$751,000	\$3,024,576
PACs	\$61,000	\$105,000	\$100,000	\$150,000	\$145,000	\$561,000
Leadership PACs	\$0	\$30,000	\$60,000	\$50,000	\$95,000	\$235,000
EMILY's List	\$142,606	\$300,000	\$300,000	\$300,000	\$100,000	\$1,032,925
Telemarketing	\$0	\$0	\$0	\$0	\$0	\$0
Other/unsolicited	\$146,026	\$82,500	\$88,500	\$88,500	\$67,000	\$326,500
TOTAL	\$3,287,510	\$2,920,378	\$3,342,420	\$4,424,485	\$2,465,150	\$15,026,989

Raisers and Affinity Groups

One of the secret weapons of this campaign will be a strong Raiser Program. We have already begun to mobilize these folks, but will continue to strengthen the program with targeted staff support, regular communication, and tools and resources that include sample emails, letters, invitations, scripts, etc. The **Finance Committee**, the **National Finance Committee**, and **Team Nunn** will be our primary vehicles for raisers. With the Finance Committee (Georgia based) we have currently raised \$167,445, and have pledges to raise of \$1,935,000. We have a finance committee goal of \$2M for the campaign with leadership from Daniel Halpern and others who are helping to mobilize and energize this group. Continued growth and effective management of the finance committee could allow us to exceed goal.

We have a goal to secure 50 National Finance Committee members by the end of January 2014 with half of them committing to raise \$25,000 or more and half committing to raise \$10,000, for a total goal of \$875,000 and a projection of \$500,000.

Our Team Nunn strategy is to reach out to social sector folks and friends of Michelle to engage them as \$10,000 raisers around the country. We currently have 13 Team Nunn folks committed and 146 identified as recruits. Team Nunn will focus primarily on lower level donors around the state.

As with any volunteer group, motivating and inspiring raisers is essential to their success. We will work to staff them well, share “insider” information with them regarding events, media hits, news from Michelle that will come in the form of a bimonthly conference call and a biweekly

email. Michelle or a surrogate (Gordon, Jeff) will participate on the conference calls, on occasion joined by a “special “guest” (Honorary Chairs, Senator, CEO, or “celebrity). The purpose of these conference calls will be to thank and motivate the raisers, given them insider news about the campaign, and ask for their specific help where needed (events, hitting end of quarter targets, etc.) A schedule of calls and recommended hosts for each call is being developed and will include targeted calls for some of the “affinity” groups listed below.

Within our raiser program, we see some specific audiences emerging as “affinity groups” that should be targeted because of their specific issues and particular connection to Michelle. In many of these groups, we have existing “anchors” who can help raise money from these constituencies. They are detailed below to illustrate the specific opportunities, messaging, and goals that are evolving and will be reached through a variety of fundraising tools. Staff assignments will be made as we prioritize these groups in our January planning session.

Women

- Opportunity: growing interest in female candidates (per earlier link) and strong identification with Michelle as a mother and wife, and as a founder of HOA.
- Message: Women ended the government shutdown. Help me get to Washington where I can bring a much needed spirit of collaboration.
- Potential Anchors: WIN List folks, Lisa Bankoff, Jeannie DuBose, Peggy McCormick, Carol Jackson, and African American leadership, Ingrid Saunders Jones, Evern Cooper, Lisa Borders, Stacey Abrams. Nationally, women of the Senate can play a big role here: Gillibrand, Warren, et al. who can make reach out to their donors with fundraising appeals, participate as guests on conference calls targeting women raisers.
- Goals: to be developed, including collaboration with “Women for Nunn” to develop fundraising as a component of their house party strategy (e.g. 100 parties happening across GA on the same night raising \$2,600 each.) *Projected Goal: \$300,000*

Georgia CEOs and business leaders

- Opportunity: This group has largely been in the Republican camp, but Michelle has unique leadership from a top drawer group of CEOs and business leaders who are committed to bringing business to the table for us, supporting financially, serving on the finance committee, and being public voices supporting her candidacy. There is both a fundraising and media opportunity here as evidenced by the recent Bloomberg article that can result in significant money.
- Message: Through my work with the business community and starting organizations, I understand the challenges businesses face. The government shutdown and gridlock in Washington has had real costs for businesses and our economy. Let's end crisis driven budgeting, lower the corporate tax rate, and create a well trained work force.
- Potential Anchors: Muhtar Kent, Ray Weeks, Carl Ware, Vicki Palmer, Yum Arnold, Jim Geiger, Arthur Blank, and a growing number of others.

- Goal: 50 Georgia leaders signed on as “GA Business Leaders for Michelle”, raising her business credibility, serving as advisors, and pledging to raise a million dollars.
Projected Goal: \$1,000,000

National Finance Committee

- Opportunity, similar case as above. This group includes leadership from heavy weights like GE CEO Jeff Immelt who has offered to host an event, plus numerous other relationships that come largely from Michelle’s corporate relationships at Points of Light. We will leverage their participation by having them serve on a national finance committee, convene others, and serve as “celebrity” guests for events and conference calls. These folks are also a gold mine for the right media opportunities.
- Message Through my work with the business community and starting organizations, I understand the challenges businesses face. The government shutdown and gridlock in Washington has had real costs for businesses and our economy. Let’s end crisis driven budgeting, lower the corporate tax rate, and create a well trained work force.
- Potential Anchors: Jeff Immelt (GE), Brian Goldner (Hasbro), Huhang Ansary (Stewart & Stevenson LLC), Peter Scherr (Chase), Herb Kohler (Kohler)
- Goal: 25 national business leaders signed on as “Business Leaders for Michelle”, raising her national visibility, increasing support from business community.

Young professionals

- Opportunity: This is a growing group of emerging leaders that increasingly represents the diversity of Georgia’s population and can be a powerful force to mobilize for Dems. We are engaging them through events and networking/professional development opportunities.
- Message: Bring down student debt load, job creating in Georgia, investing in innovation and entrepreneurship. Millennials will care about Michelle’s background as a change maker, believer in innovation and entrepreneurship; her view that every person has the power to make a difference, to change the world, should resonate.
- Potential Anchors: Chairs of the Emerging Leaders Council, Shawn Wilson and Nicole Leffer, Kashi Sehgal, Eva Zamarippa
- *Projected Goal: \$100,000*

LGBT

- Opportunity: Michelle’s positions on gay marriage and the HRC endorsement provide a huge opportunity for mobilizing this community and their substantial resources.
- Message: I believe everyone has the right to enjoy the commitments and benefit of marriage to the person they love. This is not a position shared by my opponents, so I hope you’ll join me on this journey and lend me your full support so we can win this race.
- Potential Anchors: Cathy Woolard, Ken Britt, Tony Conway, Edie Cofrin
- *Projected Goal: \$300,000*

Jewish Community:

- Opportunity: Michelle's position on Israel will largely determine the level of support here. There is tremendous financial opportunity, but the level of support will be contingent on her position. This applies not only to PACs, but individual donors as well.
- Message: TBD
- Potential Anchors: Sheri and Steve Labovitz, Elaine Alexander, Jewish Democratic Women
- *Projected Goal: \$250,000*

Trial lawyers and law firms

- Opportunity:
- Message:
- Potential Anchors: Ken Canfield, Jim Butler, Gordon Giffin
- *Projected Goal: \$500,000*

Tech Community

- Opportunity: Georgia has a thriving startup community driven and supported by institutions across the state, including Georgia Tech. These jobs are an increasingly important engine for economic development in the state.
- Message: Michelle knows what it's like to do a startup. She believes in the entrepreneurial spirit of Georgians and wants to create a business environment that supports that kind of creativity and drive.
- Anchors: Chris Klaus, David Cummings
- *Projected Goal: \$100,000*

Fundraising Vehicles

Events: Events have been the strongest performer for us for the last two quarters (\$1.5M) and a high percentage resulted guests who hosted or are hosting additional events. For 2014, the challenge will be to continue to balance the revenue opportunities of major markets with the need to be out in the state beyond Atlanta. Any event outside Atlanta is likely to max at \$10,000, so we will be looking at combining those with policy and press events to best utilize the candidates time and expose her to the largest numbers of voters. Additionally, we will utilize surrogates for some of the smaller events.

Georgia events are budgeted at \$3M and national events at \$3.8M. We will be bringing the finance team and national events consultant together in early January for a planning session to fully map out the strategy, timing, locations, and potential hosts for meeting these goals. We will need to ensure her calendar and our structure support these aggressive goals. Key elements essential to effective events:

- A robust host committee, the more the merrier, and even better if some of hosts are high profile and help draw attendance to the event while at the same time helping put dollars in our bank account.
- Clear targeted fundraising goals and event process understood in advance
- Lead time of four to six weeks
- Strong staff support and online support via dedicated links provided to hosts

- Turnkey materials (these have been developed to support the hosts: check lists, invitations, sample emails, etc.)

To get to these numbers, we will need at least one “signature” fundraising event in Atlanta and one in New York and/or Washington that brings out celebrity and party hosts (Clintons) to raise \$250,000 each in Q3.

Resoliciting those who attended events and those who were invited, but did not attend, has not been happening, but needs to be consistently occurring every six to eight weeks or we are leaving money on the table. In the case of events, the resolicit effort should be part of the hosts’ role. Outside of events, resolicits will be handled by our direct mail firm, Rapid Response, and Trilogy Interactive our Digital team as well as through resolicitation phone calls from Michelle and Senior Finance Staff.

Call Time: We will continue to improve call time and work to employ best practices consistently, e.g. double dialing. Call time needs to be prioritized, protected, and ideally consistently happening every day at regular times if possible. Our primary focus with call time will be making major requests, 1) asking individuals to raise \$10,000 or more either through an event or as just as a raiser, and 2) asking donors who have maxed to contribute to the Nunn Victory Fund. At this stage, too much time is being spent on thanking those prior to and after an event vs. making money asks. We will also continue to improve call sheets, providing strategic calls to make with appropriate information, and we hope to engage more finance committee members in participating in call time with Michelle. Suggestions have included having Andy Young agree to be on the phone with Michelle once a month, having Dan Halpern join call time regularly, also pulling in some of our business leaders. Strategic targets for call time will include:

- Donors who have given \$1,000, but have capacity to max (Michelle, Gordon, and finance committee members)
- Donors who have maxed and are candidates for Victory Fund Gifts (goal is to secure 10 at \$10K) (Michelle, Gordon)
- Raisers prioritizing national finance committee, securing agreement to raise and their gift (Michelle and FC as peer to peer, assuming they have committed to raise, e.g. Halpern, hopefully Gene Duffy)
- Staff/volunteer call time to focus on those who have attended events, but not yet given and to resolicit medium to low dollar donors.
- End of quarter phone banks/dial a thons hosted by Michelle and inviting members of the finance team to join for one and two hour time blocks to help close out the quarter successfully.

Online

Fundraising is one specific and critical element of our overall digital strategy, but it is our second most productive tool behind events with a \$3M goal. Trilogy notes in their plan that achieving this goal “assumes the Nunn campaign becomes a top tier, nationalized race.” Absent that race dynamic, this channel may struggle to reach goal.

Overall goals of our online efforts are relationship building, list building, and donations. Again, this is a fundraising area that will benefit from strong coordination with the communications team to ensure we are taking advantage of their great work and effectively synching up with their messaging and audience targeting.

The model projects nearly \$2M coming from email outreach to the Nunn list. This outreach must effectively reflect the voice of the candidate, as well as incorporate the voice and personalities of other folks (Gordon, Ron, Jeff, Colleen, Senator Nunn, Paige or affinity group anchors who do targeted outreach on their issues to their group). Communications need to build relationships and engage this audience beyond just asking them for money. They should feel like members of the campaign family with an inside view into what's happening, we should ask their opinions, share news with them early, and employ an approach that feels personal, fresh, and interesting vs. cookie cutter. Again, we will need to balance tried and true, with innovation, but we should take advantage of the unique assets of this candidate and trust the expertise of our vendor who did Senator Claire McCaskill's and Elizabeth Warren's campaigns in 2012.

The model also projects at least \$450,000 coming from third party partners (Senators, party committees, celebrities and other high profile voices) sending to their email lists. \$350,000 coming from online ads (\$120,000 was raised through ads in the first three months of the campaign) and \$300,000 coming from low dollar contributions of less than \$250. As the race heats up, these two channels targeting low dollar contributions should be maximized to the fullest and could generate more.

Direct Mail

There is currently nothing budgeted for this channel beyond resolicitation mailing. However, we do plan to do some testing early in 2014 to determine at what level we will use this tool, or if we use it at all to prospect for new low dollar donors who will continue to give to the campaign. While it can be incredibly effective, we have to be realistic about the campaign's willingness and ability to act on the advice of the direct mail firm. If we don't have the stomach to take their advice, and act decisively, then we have to be willing to accept potentially much lower returns or simply opt out of direct mail. The strategies at question here are the proven techniques of direct mail, giving the reader "red meat" and providing enough "contrast" to generate an emotional response that results in mailing a check. Experience to date indicates that there is the candidate is not comfortable with this practice and therefore, the campaign should probably not spend the money. The total budget is \$862,880 to raise \$1.3M with a staggered spend that projects revenues funding the program and limited out of pocket expenses. Our Direct Mail Consultants, Rapid Response, have a strong track record with candidates including Elizabeth Warren, Mazie Hirono, and Tammy Duckworth.

However, it's critical to note that if we determine we need to raise significantly more than \$15M it will be essential to revisit direct mail as a strategy. Projections indicate we would net nearly \$450,000 from a segment of the population we will only reach through this vehicle. These are primarily older Americans, outside the state of Georgia, who read and respond to direct mail solicitations.

EMILY's List:

EMILY's List sees this race as one to watch and a campaign that they are going to invest in at significant levels. They have committed to raising \$1M for Michelle. These donors are ours to resolicit for the life of the campaign, but cannot be solicited after the race. It will be up to us to engage these donors to the fullest between now and November. EMILY's List is also providing consulting support and operational support that is tremendously helpful.

PAC:

We have had some success with PAC support and hope that this can continue to be a source of funding (contingent on her positions). A total of \$450,000 in PAC contributions is projected. A

planning meeting with the national fund raising consultant in early January will result in a detailed plan and schedule for raising these funds.

We are budgeting \$75,000 for this quarter broken down as follows:

Leadership	\$45,000
Labor	\$20,000
Progressive	\$10,000
Business	\$0

Nunn Victory Fund (\$3M)

The coordinated campaign or Nunn Victory Fund provides an additional opportunity for donors to support the campaign beyond the \$5,200 limits of the primary and general elections. These funds are essential to the campaign's mobilization and get out the vote efforts and serve as a great vehicle for donors who have the capacity and want to do more for Michelle. The campaign will dedicate one full time finance person to lead fundraising efforts for the Victory Fund in coordination with the finance director. The candidate, campaign chair, and Finance Committee members will all support Victory Fund fundraising and outreach to maxed out donors. Contribution forms, 1 pagers, and talking points will all be provided as tools and materials helping to market the Victory Fund. This information will also be made available on the website.

We will work to solicit funds this quarter from those who might have the capacity and interest in donating in 2013 and 2014; Q4 2013 goal is to raise \$100,000 from 10 donors. The campaign chair has sent letters out to 18 maxed out donors and they will receive a follow up phone call from Michelle or Gordon the week of 12/9. Funds will predominately be raised in the first three quarters of 2014, with much smaller amounts projected for Q4 2013 and 2014. The maximum donation per calendar year is \$10,000.

DSCC Tally (\$1M)

The DSCC has asked us to make an effort to raise \$1 million for them from GA donor sources. A limited number of donors will have the capacity and interest in going "all in" because of their relationship and commitment to Michelle and/or their sophistication as a party donor. The opportunity to make this maximum contribution across all areas of the campaign will be reflected on a one pager and a customized donor card that makes it easy to understand and make the donation. The maximum donation per calendar year is \$32,400.

XII: Org. Chart & Job Descriptions

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Organizational Chart & Job Descriptions

Deputy Campaign Manager, Jessica Kirkwood

The Deputy Campaign Manager is responsible for ensuring that the Nunn for Senate Campaign engages volunteers at every level of the organization, from Finance to Communications, to Field Organizing to Policy. She also leads digital innovation — volunteer and interactive aspects of the website, as well as the Digital Corps - a team of volunteers committed to spreading the word about the campaign via their social networks. Additionally, the Deputy Campaign Manager oversees scheduling, staffing, briefing and correspondence for the candidate. She supports the campaign team in ensuring management meetings and gatherings are in place.

Research Director, Dan Morrocco

The Research Department is responsible for compiling and preparing for use all available information on Michelle and her opponents. The Research Director will work with the Research Associates to write background documents for use by the campaign and our media team. The Research Director and Associates also provide information

for use by the Communications, Fundraising, and Policy staff and work with our tracker and Press Assistant to monitor the candidates' statements and news cover.

Communications Director, Nathan Click

Policy Director, Julie Murphy

Finance Director, Paige Moody

The Finance Director develops fundraising strategy and oversees implementation of the finance plan, provides leadership and support to the team in achievement of quarterly goals, responsible for providing complete and accurate documentation for quarterly FEC filings. In addition to hiring and overseeing finance staff and volunteers, the finance director manages consulting relationships responsible for fundraising to include: out of state fundraising, online fundraising, and direct mail. Works with Campaign Manager to monitor and reconcile fundraising plan, campaign budget on an on-going basis. Provides oversight of NGP to ensure integrity for acknowledgement and reporting. Works with compliance firm and staff to ensure campaign campaign compliance with all state or federal election laws. Finance Director will also work to infuse innovation and the candidate's voice and personality across all fundraising strategies in coordination with the communications and policy teams.

Senior Deputy Director, Melissa Devereaux

Serves as the Deputy to finance director in managing staff and providing leadership that supports implementation of the fundraising plan and achievement of quarterly goals, with emphasis on in state goals. Specific responsibilities include:

- Development and implementation of call time program
- Staffing and direct support to the candidate in achieving call time goals
- Coordination and integration between call time program, raisers, events, including reporting and data integrity
- Coordination of acknowledgement process, ensuring timely response and appropriate infusion of the candidate's voice and personal commitment to thanking donors
- Raiser/event management of limited number of strategic or high dollar donors

Deputy Finance Director/Raisers and Events, TBD

Will work with senior deputy director to develop and implement a successful raiser strategy focused primarily on in state events and affinity groups. Specific responsibilities include:

- Prospecting, identifying and securing hosts who can deliver successful events with emphasis on \$20K+ events, and ensuring geographic reach across the state
- Developing tools and materials that effectively support raiser/event coordinators
- Training and managing a team of raiser/event coordinators (including volunteers) who work effectively with hosts to develop, deliver and exceed goals
- Ensuring that tracking, reporting, and acknowledgement process are followed for every event
- Raiser/event management of limited number of strategic of high dollar donors

Deputy Finance Director/Raiser and Resolicitation Program, Fletcher Sams

Works with senior deputy director to develop and implement an innovative raiser program that leverages the full potential of the candidates relationships and connections outside the “usual suspects”. Also develops resolicitation strategy, tracking and reporting. Specific responsibilities include:

- Identifying raiser prospects who can raise \$10,000+
- Successfully leading raisers through a rolodexing process that helps them reach and exceed goals while significantly expanding the candidate’s donor base
- Equipping raisers with the tools and materials needed to help them succeed
- Establishing regular communication with raisers, creating team spirit, sense of commitment
- Regular tracking and reporting of raiser progress
- Oversight of data integrity, reporting and tracking of raiser and resolicitation program in NGP
- Serves as NGP support and trainer

Deputy Director Finance Committee, Laurel Lucey

Stewards and supports the Finance Committee in meeting their pledged financial commitments to the campaign. Support includes:

- Establishing and managing regular communications and conference calls; group and individual outreach In partnership with the finance director, campaign chair, and the candidate
- Supporting events, letter writing or other outreach from finance committee members

- Ensuring the finance committee data and outreach is appropriately recorded and tracked in NGP
- Maximizing participation of every finance committee member through their own personal financial commitments, their personal and professional networks, and their expertise
- Ensuring strong coordination with finance committee and other raisers/events happening across the state and around the country
- Coordinating with the Victory Fund finance director to ensure strong participation of Finance Committee members in the VF.

Deputy Director Affinity Groups, Sherry Labovitz

Develops and executes affinity group fundraising strategies in coordination with the finance director, campaign manager, and mobilization team (Sally Rosser/Jessica). This outreach includes, but is not limited to LGBT, Jewish, women, and African American communities.

- Identifying leaders within these communities as hosts and “evangelists” for Michelle, setting fundraising goals and executing events
- Working within these communities to look at alternative strategies to events (letter writing, etc)

Call Time Manager, Carissa Pawell

Supports successful implementation of the Call Time program working directly with the Sr. Deputy Director. Responsibilities include:

- Ensuring accuracy and quality of call sheets
- Consistent participation and documentation of call time
- Providing appropriate follow through; daily call time entries into NGP, action items documented, distributed, and tracked to completion
- Providing input to SDD that ensures the most productive use of the candidate’s time
- Working directly with raiser coordinator team to ensure strong coordination surrounding thank you calls to hosts and donors.

Data and Research Manager, TBD

Supports the finance team as NGP lead focusing on data integrity throughout the campaign and providing research support as needed. Works directly with finance director to support all finance reporting and tracking. Responsibilities include:

- Regular maintenance and spot checking to ensure protocols are being followed, including main codes, call tracking, gift tracking

- Training and support to new team members and volunteers
- Development and creation of reports supporting campaign leadership
- Working with compliance to ensure quarterly filings will be complete and accurate
- Donor research to help inform outreach across the state, identification of new affinity groups and their leaders, finance committee members, raisers, Victory Fund donors, etc.
- Support with data entry to all raiser coordinators and volunteers as needed

Finance and Compliance Coordinator, Jamie Timmie

Takes direction from the compliance officer/consultant to ensure record keeping is consistent with FEC rules. Handles and records all incoming checks and deposits with oversight from compliance. Manages acknowledgement process, ensuring that all are recorded and issued promptly.

Raiser Coordinators (4 TBD)

Each raiser coordinator works with fifteen to twenty active raisers each and manages five to eight events per quarter. Raiser coordinators work directly with a deputy director for assignments, training and support. Responsibilities include:

- Targeting and supporting specific affinity groups (to be assigned)
- Assessing and identifying a successful host
- Working with a raiser/host to ensure their success, managing through the host/raiser checklists
- Ensuring appropriate preparation and follow through from setting a goal, to following up with guests who attended and those who did not
- Ensuring data from every event is appropriately entered and tracked in NGP

Finance Assistant, TBD

Supports the finance team leadership as needed through data entry, assembling the weekly finance committee reports, and managing all finance team volunteers, from intake to assignments. Responsibilities include:

- Back up to raiser coordinators and finance coordinator as needed
- Trained to support call time manager as needed
- Supports weekly finance call; collects necessary data for developing and submitting weekly finance update
- Supports finance committee communications and reporting
- Works with Jessica to manage finance volunteer intake

- Works with CFD and finance team to develop effective volunteer projects and manages those assignments
- Serves as point person for all finance volunteers

Lauren Gaia, Campaign Scheduler

The Campaign Scheduler manages the day-to-day schedule for the candidate. She is responsible for managing the overall schedule, working with schedulers from other departments and ensuring all meetings and events are properly staffed and arranged. The scheduler also manages the production of the daily briefing book for the candidate. The scheduler ensures that staff assigned to events and meetings provide the appropriate briefing materials for the candidate in a timely manner and includes them in the daily briefing book. The Campaign Scheduler also supports candidate correspondence.

Natali Thompson, Personal Aide/Special Assistant (Body Person)

The “Body Person” is responsible for serving as the candidate’s driver; ensuring that the candidate arrives and leaves events on time and adheres to the daily schedule; monitor’s the candidate’s energy and assisting with meals, water, wardrobe. She facilitates and updates the daily briefing book; and serves as an executive assistant to the candidate – taking notes during meetings, collecting business cards, conducting meeting follow up, writing thank you notes. All personal correspondence for meetings is the responsibility of the body person.

Aaron Sampson, Office Manager

Molly Burke & Pinney Allen, Co-COO’s/Voter Protection

Rohit Malhotra, Digital

Andy Ratto, Constituency Building

Tiffany Fitzgerald, Constituency Building

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Online Fundraising Plan

Memo

To: Nunn for Senate campaign team
From: Brent Blackaby, Chase Mohny, Brian O'Grady, Rehan Alam
Date: December 6, 2013
Re: 2013-14 online fundraising plan + expanded digital calendar

The Nunn for Senate online program spans a wide range of digital channels, far beyond the website: email, Facebook, Twitter, Instagram, YouTube, online ads, blog posts, and more.

Through these online channels, the campaign can communicate with a wide range of different constituencies — from campaign insiders, press, pundits, and donors to volunteers, Democratic activists, and voters across the political spectrum.

Over the past few months, much of the work we've done has been to build the infrastructure (website, social media platform, and email system) that can reach this broad range of communication targets while also capturing early enthusiasm for Michelle's candidacy.

Now, in this plan, we focus on one specific (and vitally important) piece of that overall digital strategy: Online fundraising, which requires building and mobilizing a donor base, a subset of the overall online effort.

The campaign has set an ambitious goal of raising \$3 million online. While aggressive, we believe that is achievable given the current race dynamics. This memo (and the accompanying Excel model) lays out a plan for meeting that goal with an acquisition budget that assumes the Nunn campaign becomes a top-tier, nationalized race, likely as a result of a hotly-contested Republican primary that produces a far-right general election candidate.

Approach

We've seen it time after time: You can have the best candidate, the best website, and the best message in the world. But in and of itself, a huge wave of online donations won't just naturally materialize.

To achieve online fundraising success, you must be relentless in identifying potential donors, targeting them, signing them up, building a relationship with them, and converting them into givers over time.

TRILOGY

For some donors, that might be a short effort (e.g., they see one ad and contribute right away). For others, that may take weeks or months (e.g., they follow Michelle on social media, then sign up for email updates, receive several emails, and finally give).

Some donors are motivated by issue positions. Others by electing more women to the Senate. Some by pragmatic politics of electing a Democratic senator in the South. Others still by feeling some kind of a personal connection to the candidate, even if they've never actually met Michelle.

In all of these scenarios, and many others, online fundraising success requires developing and maintaining a frequent outbound *engagement* effort across a variety of digital channels (i.e., ads, social media, and email) to keep prospective donors connected to Michelle and the campaign; and, in concert with that engagement, a conscious online *solicitation* effort (through email, still by far the most effective online fundraising tool), so when supporters are ready to give, we prompt them with a well-timed ask to collect their contribution.

Building a relationship with prospective online donors means we can't just send a barrage of fundraising solicitations. Online supporters tire of that very quickly. Instead, we must continue to communicate with people about a variety of different topics, with a variety of different asks: Signing petitions to show support for Michelle's stands on particular issues; signing up to volunteer or attend an event; invitations to share a Facebook graphic or submit a photo; asks to share their own thoughts about what's working in Georgia, or successful volunteer service projects near them.

If prospective donors feel a stronger overall connection to the campaign, and feel they are respected as a supporter and not just a cash register, they will be more likely to give (and give again) over the course of the campaign.

That is the overall approach we're employing when laying out an email calendar that's balanced between fundraising solicitations and other non-fundraising engagement — because we believe it's the strategy that will maximize revenue over the long-term.

More than half of our online fundraising revenue is likely to come in the final 2-3 months of the campaign — and we want a donor base that will be particularly inspired to give generously at that crucial time. We don't want them burned out from a barrage of non-stop fundraising appeals over the previous 9-12 months.

Email List-Building

Equally important to our approach to engaging prospective donors is being aggressive (but smart) in building an email list.



To reach our goal of raising \$3 million online, we will need to grow the email list substantially. In our model, we anticipate building to at least 130,000 supporter emails, but we should aim for 150,000 or even 200,000 if possible.

Much of that list-building can be done organically — through joint list-building campaigns with endorsers or friendly organizations (i.e., a joint online petition with Kay Hagan on Citizens United), opt-in email blasts to well targeted lists (i.e., the DSCC Georgia list), and coordination with the Nunn campaign’s volunteer and field efforts (to ensure that sign-up data is being added to the email database regularly).

We assume that as many as 90,000 emails or more will come through these organic means. That assumption requires a lot of legwork from the Nunn team and Trilogy to make happen, and also relies on the campaign to be willing — while staying within our message box — to take and publicly advocate for strong stands on relevant national political issues that matter to online activist communities.

In addition, a substantial amount of the list-building will require marketing dollars — particularly on online direct response ads (e.g., Google, Facebook, Bing/Yahoo) and email list rentals (e.g., Democrats.com, Hillary Clinton campaign list, National Memo).

In the model, we project needing to spend at least \$350,000 on online list-building for the duration of the campaign, to add at least 40,000 well-targeted names. However, if certain channels are performing really well in both cost and revenue performance indicators, we may come back to request additional budget.

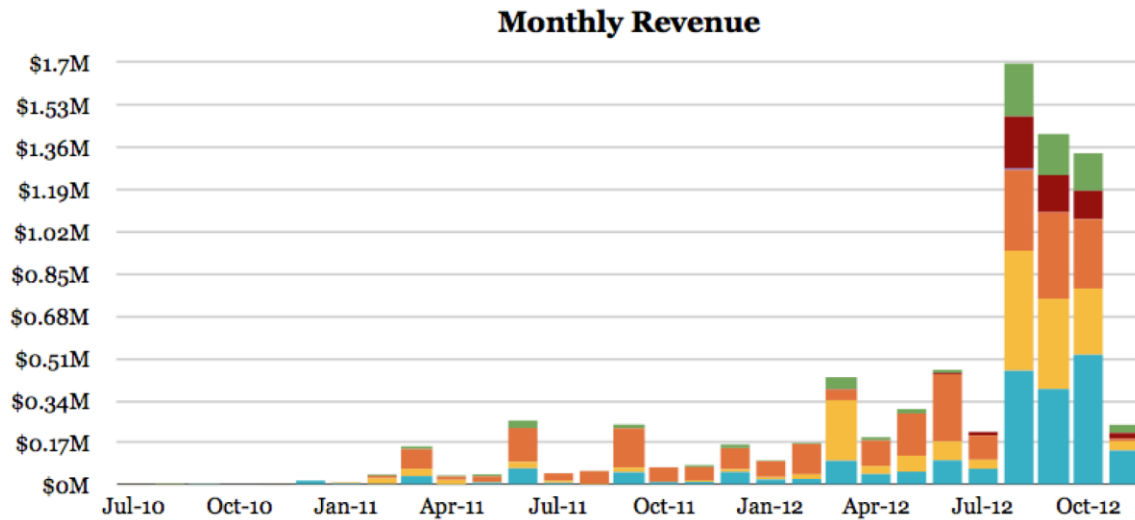
One final comment: When you look at the model, you might see a relatively “smooth” list growth path that steadily adds new names each month. In reality, the list-growth curve may be more “spiky,” especially in the organic category, as we get support from partners with big email lists that add a big chunk of new names all at once.

Online Fundraising Timing & Tactics

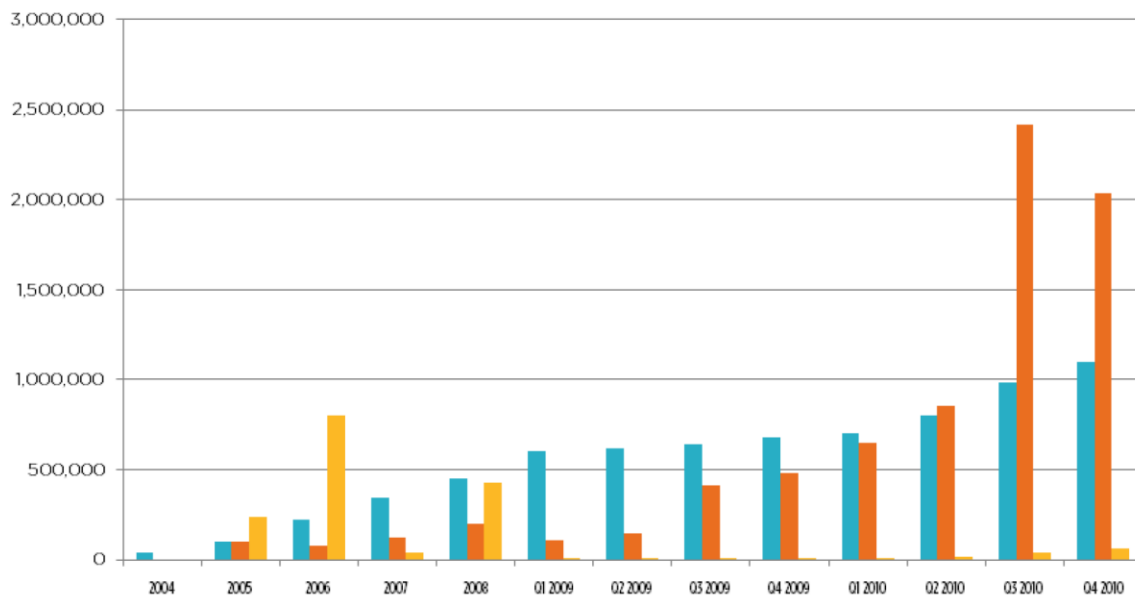
Some of our online fundraising revenue will come early, but most will come late. In fact, as much of half of the revenue will probably come in the final 3 months.

Most of our Senate clients have followed this same “hockey stick” path, seeing exponential growth at the end of the campaign when activists and donors really feel the urgency of Election Day pushing them to contribute.

Below are two charts (one a 2012 Senate candidate, the other a 2010 Senate candidate) showing this trend:



Source: Trilogy client, a 2012 Senate campaign (total bar height corresponds to monthly fundraising revenue)



Source: Trilogy client, a 2010 Senate campaign (orange bars show quarterly fundraising revenue; blue bars show email list size)

The Nunn campaign had a big online fundraising period around launch in July and August. We're now seeing a slight pullback, as the immediate excitement around launch has worn off a bit, and anticipating an accelerated ramp-up as Election Day approaches.

TRILOGY

This expectation is reflected in the model: Of the \$3 million total revenue forecast, more than \$1.5 million comes in August through October.

Of the \$3 million, we anticipate raising nearly \$2 million through emails to the Nunn list. Many of these emails should be in Michelle's voice — no one can replace the principal in terms of inspiring donors to give. However, to try and protect Michelle's unique voice, and keep her "above the fray" as long as we can, we need to develop alternative voices (e.g., Jeff, Gordon, Paige) that can talk in more aggressive language about the political landscape, poll numbers, opponents' attacks, fundraising deadlines, etc. These kinds of campaign nuts & bolts and competitive dynamics are critical for fundraising.

Our model also projects raising at least \$450,000 from third-party partners, almost exclusively via emails they send to their own lists. These partners would include Democratic Senators, party committees, celebrities and other high-profile voices from Michelle's personal network, progressive organizations, and other groups who support Michelle. We have already developed a target list, which we should expand with input from the team, and then continue to make these asks. However, it should be noted that this channel more than any other relies on Michelle's becoming a nationally-recognized, top-tier, targeted campaign. Absent that race dynamic, this channel will account for a much smaller amount.

We project at least \$350,000 in immediate revenue from online ads — the money that people give right after they sign-up. While the long-term revenue from online direct response ads will show up through the email program (after all, the main goal of these acquisition ads is list-building, which pays off over the duration of the campaign), the short-term revenue from immediate giving after seeing an ad is not insignificant. We raised more than \$120,000 this way over the first 3 months of the campaign, and while this number will taper as a percentage over time, we still expect direct response ads to contribute significant revenue to the bottom line.

Lastly, we forecast raising at least \$300,000 in low-dollar (<\$250) contributions through the website and social media. These "unsolicited" gifts tend to pick up as media attention is focused on the campaign. Social media, in particular, is not anticipated to be a huge driver of direct dollars — however, social media has a crucial role in keeping supporters engaged over the duration of the campaign, so we can then solicit them and "close the deal" through email.

Please let us know if you have any questions or comments about the plan, or the assumptions we've made here or in the model. This commentary just scratches the surface of our overall strategy and approach to online fundraising, but hopefully it covers the key points.

Roadmap

The calendar below lays out the next several months (through January 2014) in significant detail with broader strokes through November 2014. This is a rough calendar -- as race dynamics change and opportunities arise, we will shift to take full advantage of every opportunity.

MONTH	EMAIL	PAID MEDIA
December 2013	<p>12/4 -- Tour #1 -- Video on Contribution Page -- MMN</p> <p>12/7 -- Tour #2 -- Wrap up video on Contribution Page -- MMN</p> <p>12/10 -- Advocacy message (Budget?) w/ post-action fundraising -- MMN</p> <p>12/12 -- Advocacy message #2 w/ post-action fundraising -- DiSantis</p> <p>12/17 -- EOQ #1 -- MMN</p> <p>12/19 -- EOQ #2 -- DiSantis</p> <p>12/23 -- Holiday Card -- MMN</p> <p>12/26 -- EOQ #3 -- Moody</p> <p>12/28 -- EOQ #4 -- DiSantis</p> <p>12/30 -- EOQ #5 -- Surrogate, else DiSantis</p> <p>12/31 AM -- EOQ #6 -- MMN</p> <p>12/31 PM -- EOQ #7 -- Moody</p>	<p>Acquisition Budget: \$10,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Facebook <input type="checkbox"/> Test List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available) <input type="checkbox"/> Test Direct-To-Donate to existing email list
January 2014	<p>1/1 -- EOQ Donor TY -- MMN</p> <p>1/2 -- Service Teams -- MMN</p> <p>1/8 -- Engagement (What's your top priority in 2014?) -- MMN</p> <p>1/11 -- Engagement (Priorities Survey Follow Up) -- DiSantis</p> <p>1/20 -- MLK Jr. Message -- MMN</p> <p>1/22 -- SOTU Response -- MMN</p> <p>1/29 -- EOM Fundraising (Test)</p> <p>1/31 -- EOM Fundraising (Test)</p>	<p>Acquisition Budget: \$25,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available)

TRILOGY

February 2014	<p>8 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 5 Engagement <input type="checkbox"/> 3 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> EOM Fundraising (Donor Match) 	<p>Acquisition Budget: \$25,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available)
March 2014	<p>11 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3 Engagement <input type="checkbox"/> 8 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> EOQ Fundraising: 8 emails 	<p>Acquisition Budget: \$25,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available) <input type="checkbox"/> Test Direct-To-Donate to existing email list
April 2014	<p>7 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 4 Engagement <input type="checkbox"/> 3 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Pre-Primary/EOM Fundraising 	<p>Acquisition Budget: \$25,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available)
May 2014	<p>10 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3 Engagement <input type="checkbox"/> 2 GOTV <input type="checkbox"/> 4 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Post-Primary Fundraising starting 5/21 (4 emails) 	<p>Acquisition Budget: \$25,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available) <input type="checkbox"/> Test Direct-To-Donate <p>Primary Persuasion Budget: ???</p> <ul style="list-style-type: none"> <input type="checkbox"/> Display <input type="checkbox"/> Facebook <input type="checkbox"/> Pre-Roll <input type="checkbox"/> Managed Placements
June 2014	<p>12 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3 Engagement <input type="checkbox"/> 9 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> EOQ Fundraising: 9 emails 	<p>Acquisition Budget: \$25,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available)

TRILOGY

July 2014	<p>10 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 5 Engagement <input type="checkbox"/> 5 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> Post-Runoff Fundraising starting 7/23 (5 emails) 	<p>Acquisition Budget: \$25,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available) <input type="checkbox"/> Test Direct-To-Donate
August 2014	<p>9 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3 Engagement <input type="checkbox"/> 6 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> EOM Fundraising (5 emails) 	<p>Acquisition Budget: \$30,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available) <input type="checkbox"/> Scale Direct-To-Donate
September 2014	<p>13 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3 Engagement <input type="checkbox"/> 10 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> EOQ Fundraising (10 emails) 	<p>Acquisition Budget: \$50,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available) <input type="checkbox"/> Scale Direct-To-Donate <p>Persuasion Budget: TBD (Recommended min. 10% of media budget)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Display <input type="checkbox"/> Facebook <input type="checkbox"/> Pre-Roll
October 2014	<p>13 Emails</p> <ul style="list-style-type: none"> <input type="checkbox"/> 3 Engagement <input type="checkbox"/> 10 Fundraising <p>Key campaigns</p> <ul style="list-style-type: none"> <input type="checkbox"/> GOTV Fundraising Drive (7 emails) 	<p>Acquisition Budget: \$50,000</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search (Keyword) <input type="checkbox"/> Google Display Network <input type="checkbox"/> Facebook <input type="checkbox"/> List Rentals <input type="checkbox"/> Guaranteed Rate Acquisitions (if available) <input type="checkbox"/> Scale Direct-To-Donate <p>Persuasion Budget: TBD (Recommended min. 10% of media budget)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Display <input type="checkbox"/> Facebook <input type="checkbox"/> Pre-Roll

<p>November 2014</p>	<p>11/1 AM -- Final Weekend Fundraiser #1 -- DiSantis</p> <p>11/1 PM -- Final Weekend Fundraiser #2 -- Field Director</p> <p>11/2 -- Vote Plan (Engagement) -- DiSantis</p> <p>11/3 -- Remind your friends -- DiSantis</p> <p>11/4 -- GOTV -- MMN</p> <p>11/5 -- Victory/Defeat Message -- MMN</p>	<p>Persuasion Budget: TBD (Recommended min. 10% of media budget)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Display <input type="checkbox"/> Facebook <input type="checkbox"/> Pre-Roll <input type="checkbox"/> Managed Placements
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Michelle Nunn for U.S. Senate

2013-2014 List Building & Online Fundraising Model

DRAFT -- NOVEMBER 19, 2013

	2013					TOTAL 2013	2014				
	July-Aug	Sept	Oct	Nov	Dec		Jan	Feb	Mar	Apr	May
Email list size	5,000	12,000	13,500	15,600	17,133	18,800	18,800	27,371	35,943	44,514	55,586
Viral list growth/Swaps	8,831	1,242	1,464	1,000	1,000	13,537	5,000	5,000	5,000	7,500	7,500
Paid list growth	3,169	258	636	533	667	5,263	3,571	3,571	3,571	3,571	3,571
Cost/name	\$ 9.29	\$ 11.94	\$ 12.78	\$ 15.00	\$ 15.00	\$ 11.14	\$ 7.00	\$ 7.00	\$ 7.00	\$ 7.00	\$ 7.00
ADS: Acquisition Cost	\$ 29,445	\$ 3,081	\$ 8,130	\$ 8,000	\$ 10,000	\$ 58,656	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
Post-acquisition ROI %	245%	1355%	146%	150%	150%		75%	75%	75%	70%	70%
ADS: Post-acq Revenue	\$ 72,124	\$ 41,750	\$ 11,880	\$ 12,000	\$ 15,000	\$ 152,754	\$ 18,750	\$ 18,750	\$ 18,750	\$ 17,500	\$ 17,500
# FR emails	6	8	3	2	10	29	4	4	10	4	4
\$ per email	\$ 12,489	\$ 11,540	\$ 4,907	\$ 5,000	\$ 10,000		\$ 5,000	\$ 5,000	\$ 15,000	\$ 7,500	\$ 7,500
EMAIL: Revenue	\$ 74,932	\$ 92,319	\$ 14,722	\$ 10,000	\$ 100,000	\$ 291,973	\$ 20,000	\$ 20,000	\$ 150,000	\$ 30,000	\$ 30,000
THIRD-PARTY: Revenue	\$ 44,429	\$ 13,886	\$ 1,118	\$ 1,000	\$ 10,000	\$ 70,433	\$ 2,500	\$ 2,500	\$ 50,000	\$ 5,000	\$ 5,000
WEBSITE: Revenue <\$250	\$ 5,978	\$ 8,118	\$ 3,445	\$ 1,000	\$ 1,000	\$ 19,541	\$ 2,500	\$ 2,500	\$ 10,000	\$ 2,500	\$ 2,500
SOCIAL MEDIA: Revenue	\$ 9,905	\$ 795	\$ 425	\$ 1,000	\$ 1,000	\$ 13,125	\$ 1,000	\$ 1,000	\$ 2,500	\$ 1,000	\$ 1,000
Tech costs	\$ 5,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 13,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000
Trilogy fees	\$ 18,800	\$ 26,000	\$ 10,700	\$ 10,000	\$ 10,000	\$ 75,500	\$ 10,000	\$ 10,000	\$ 12,500	\$ 10,000	\$ 10,000
TOTAL COST	\$ 53,245	\$ 31,081	\$ 20,830	\$ 20,000	\$ 22,000	\$ 147,156	\$ 37,000	\$ 37,000	\$ 39,500	\$ 37,000	\$ 37,000
TOTAL REVENUE	\$ 207,368	\$ 156,868	\$ 31,590	\$ 25,000	\$ 127,000	\$ 547,826	\$ 44,750	\$ 44,750	\$ 231,250	\$ 56,000	\$ 56,000
Cum Net Rev	\$ 154,123	\$ 279,910	\$ 290,670	\$ 295,670	\$ 400,670	\$ 400,670	\$ 408,420	\$ 416,170	\$ 607,920	\$ 626,920	\$ 645,920

= actuals

2013-2014 List Building & Online Fundraising Model

DRAFT -- NOVEMBER 19, 2013

	2014						GRAND
	Jun	Jul	Aug	Sep	Oct	Nov	TOTAL
Email list size	66,657	77,729	91,300	104,300	119,300	134,300	134,300
Viral list growth/Swaps	7,500	10,000	10,000	10,000	10,000	-	91,037
Paid list growth	3,571	3,571	3,000	5,000	5,000	-	43,263
Cost/name	\$ 7.00	\$ 7.00	\$ 10.00	\$ 10.00	\$ 10.00	\$ -	
ADS: Acquisition Cost	\$ 25,000	\$ 25,000	\$ 30,000	\$ 50,000	\$ 50,000	\$ -	\$ 363,656
Post-acquisition ROI %	70%	50%	50%	50%	50%		
ADS: Post-acq Revenue	\$ 17,500	\$ 12,500	\$ 15,000	\$ 25,000	\$ 25,000		\$ 339,004
# FR emails	10	6	8	10	10	2	101
\$ per email	\$ 20,000	\$ 12,000	\$ 25,000	\$ 40,000	\$ 40,000	\$ 40,000	
EMAIL: Revenue	\$ 200,000	\$ 72,000	\$ 200,000	\$ 400,000	\$ 400,000	\$ 80,000	\$ 1,893,973
THIRD-PARTY: Revenue	\$ 50,000	\$ 25,000	\$ 25,000	\$ 100,000	\$ 100,000	\$ 15,000	\$ 450,433
WEBSITE: Revenue <\$250	\$ 10,000	\$ 5,000	\$ 25,000	\$ 100,000	\$ 100,000	\$ 25,000	\$ 304,541
SOCIAL MEDIA: Revenue	\$ 2,500	\$ 1,000	\$ 2,500	\$ 5,000	\$ 5,000	\$ 1,000	\$ 36,625
Tech costs	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 35,000
Trilogy fees	\$ 12,500	\$ 10,000	\$ 12,500	\$ 15,000	\$ 15,000	\$ 10,000	\$ 203,000
TOTAL COST	\$ 39,500	\$ 37,000	\$ 44,500	\$ 67,000	\$ 67,000	\$ 12,000	\$ 601,656
TOTAL REVENUE	\$ 280,000	\$ 115,500	\$ 267,500	\$ 630,000	\$ 630,000	\$ 121,000	\$ 3,024,576
Cum Net Rev	\$ 886,420	\$ 964,920	\$ 1,187,920	\$ 1,750,920	\$ 2,313,920	\$ 2,422,920	\$ 2,422,920

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Operations

Operations Scheduling the Candidate

Lauren Gaia is the Campaign Scheduler. Lauren works with Jeff and Monica to ensure that each department (finance, political, communications and policy) has adequate scheduling time blocks within which they can manage priorities for the candidate.

Every Friday, Lauren leads a scheduling meeting with a representative from each department and members of the consulting team to review the two weeks ahead and any new requests for the candidate's time. Scheduling requests are discussed and approved or disapproved and Lauren follows up with the contacts to either schedule approved events/meetings or politely decline. Lauren ensures that every item on the candidate's schedule is staffed. Staff members responsible for meeting and event management take responsibility for every aspect of the event.

The long term schedule is set by Jeff, Monica and Lauren.

Staffing the candidate

Staff assigned to the candidate for an event have the following responsibilities:

Pre-Event/Meeting Responsibilities

- ☐ Brief the senior leadership team about the possible meeting on a scheduling call for meeting approval and scheduling.
- ☐ Write the event briefing using Nunn for Senate Briefing Template

- Make sure you talk to the event contact to understand and establish expectations.
How many guests are expected?
- Is the event open or closed to the press?
- Will there be a Q&A session with the guests?
- Will the candidate make a speech and, if so, is it her stump speech or something new?
If the candidate is speaking, how long are her remarks expected to be?
- Does the host have any requests around speech content?
- Who will be introducing the candidate?
- Who will be speaking after the candidate?
- As appropriate, can the person speaking right after the candidate request guests contribute to the campaign?
- Who will be present that the candidate should recognize or thank in her remarks?
- What VIPs or elected officials will be present?
- Will advance candidate prep be required? (i.e. policy briefing, speech practice & revisions, etc.)
- Will the candidate need to bring a gift?
- ☐ As needed, conduct location advance:
 - Will protesters be on-site? Outside?
 - Will non-participants have access to the candidate at this event?
 - What is the likelihood of a tracker being present?
 - Are you aware of procedure when trackers are present?
- ☐ Secure someone to take event photos and, as necessary, video. (Speeches should always be videotaped).
- ☐ Pack & bring the following materials:
 - Extra copy of the briefing document
 - Sign Up Cards (I'm for Michelle and willing to...)
 - Other (Issue One Pagers)
 - Meeting / Event Participation Guidelines (Tracker, Etc)

Responsibilities during the event:

- ☐ Remember, the drinks & food are for guests and every conversation is public
- ☐ Stand at Michelle's elbow with a notebook and pen, take notes on conversations with particular emphasis on follow up needed.
- ☐ Keep the business cards that the candidate collects for follow up.
- ☐ Ensure photos are taken (40+ preferred and many angles). Ensure video is captured as needed.
- ☐ Monitor/ Manage conversations and access to the candidate. Make sure everyone has an opportunity to speak to her and no one person keeps her so long that she must neglect other guests. (This must be done with grace and finesse, of course.)
- ☐ Ensure the candidate leaves on time. You are responsible for helping her exit the room on time to make it to her next event.

Post Event/Meeting Responsibilities

Fundraising Event Responsibilities: DUE BY COB THE NEXT DAY

- ☐ Draft text for hand written thank you note(s) to the host(s)
- ☐ Pull call sheets for Host Thank You calls for the next call time session.

- ☐ Ensure all checks get to Jamie Timmie
- ☐ Know what happens with the list of attendees (sign in sheets from the front desk)
- ☐ Know what to do with business cards MN collected and ensure that follow up happens.
- ☐ Draft any additional thank you notes (Give text and address to Jessica Kirkwood – email addresses for notes to be emailed and post address for handwritten notes.)
- ☐ Know what happens to the “I’m with Michelle” sign up cards

Non-Fundraising Event Responsibilities: DUE BY COB THE NEXT DAY (i.e. Political or other event)

- ☐ Draft text for hand written or email thank you notes as necessary. (Give text and address to Jessica Kirkwood – email addresses for notes to be emailed and post address for handwritten notes.)
- ☐ Pull call sheets for Thank You calls for the next call time session.
- ☐ Know what to do with business cards MN collected and ensure that follow up happens.

Meeting Responsibilities: DUE BY COB THE NEXT DAY

- ☐ Draft text for hand written or email thank you notes as necessary. (Give text and address to Jessica Kirkwood – email addresses for notes to be emailed and post address for handwritten notes.)
- ☐ Add meeting notes and action items to contact’s NGP record.
- ☐ Complete all action items or ensure relevant staff have the action items and are acting on them.

The “Body Person”

While various staff members provide management for specific events and meetings on the candidate’ calendar, the “Body Person,” is responsible for the candidate herself. Natali Thompson is Michelle’s personal assistant and will be responsible for these duties:

- Serving as the candidate’s driver;
- Ensuring that the candidate arrives and leaves events on time and adheres to the daily schedule;
- Monitor’s the candidate’s energy and provides meals/water/drinks;
- Supports event wardrobe planning;
- Assists with building the daily briefing book;
- Serves as an executive assistant to the candidate – taking notes during meetings, collecting business cards, conducting meeting follow up, writing thank you notes, etc;

Daily Briefing Book

As mentioned above in staff responsibilities when staffing the candidate, each meeting or event on Michelle’s calendar has an associated briefing document prepared in advance. Briefing documents include details about the event or meeting logistics, attendees, format and topics of discussion and/or concern.

Lauren Gaia prepares a daily briefing book for the candidate that includes her final schedule for the following day, all the associated briefing documents and any other relevant information needed for the day.

Office Operations

Human Resource Development

Molly Burke and Pinney Allen, Co-Chief Operations Officers, manage the process of soliciting and reviewing resumes, screening candidates and making interview recommendations for department heads.

Staff Meetings

Jessica Kirkwood organizes daily staff meetings. The leadership team meets daily at 8:30 a.m. and the full team meets daily at 8:35. Four days per week, staff meetings review the daily schedule and trending news. On Thursdays, full team meetings are extended and reporters from each department are provided. Jessica also looks for opportunities to organize gatherings for staff and volunteers to build relationships and share information.

Internet & Phones

Kendra-Sue Derby manages the internet and phone service for the campaign. Kendra Sue provided the much needed support in getting us set up and manages the ongoing maintenance.

Office Management & Supplies

Under the supervision of Kendra Sue Derby, Aaron Sampson serves as the office manager. He is responsible for supply procurement, housekeeping services, copy machines, office space, furniture, and housekeeping.

Special projects

Jessica Kirkwood provides leadership to special projects as defined by both the candidate and the Campaign Manager. Special project examples include: supporting the recent entrepreneurial tour by building out Macon events; organize volunteer events for the candidate and supporters (Hands On Atlanta Day, etc.); custom campaign engagement for friends of the family, etc.

XIII: Strategic Scheduling Analysis and Plan

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Scheduling Analysis, Guidelines & Targets

Strategic Use Of Michelle's Time: The most important resource in this campaign is Michelle's time. As of today, we have 332 days until Election Day. Assuming Michelle has weekends off for a few more months, we have approximately 250 days of her time between now and election day – at 10 hours a day we have only 2,500 hours left in this campaign. Every hour we schedule must match our strategic priorities.

2014 Priorities

<i>1st QTR</i>	80% Fundraising 10% Political (Call time, closed political meetings) 5% Press/Communications (Message events, press calls) 5% Policy
<i>2nd QTR</i>	75% Fundraising 10% Press/Communications 10% Debate & Ed Board Prep 5% Political
<i>3rd QTR</i>	70% Fundraising 20% Press/Communications/Political (Political events will likely be open press) 10% Debate & Ed Board Prep

OCTOBER 50% Fundraising
 40% Press/Communications/Political
 10% Debate Prep

NOVEMBER 100% Press/Communication/Political

2013 Analysis

Our goal in 2013 was to spend 80% of our time on fundraising, 10% on political and 10% on Communications. We analyzed 30 days (September 29 – October 31, 2013) for a quick test on how we met our goals:

Nunn Time Use 9/29-10/31,2013:

Fundraising: 56%

Management/Office: 17%

Political: 14%

Communications 13%

(Speech Prep: 5%, Press: 3% Policy: 5%)

Date	Fundraising	Political	Policy	Press	Speech	Office/Strategy Management	Total Hours
9/29-10/5	64%	11%	3%	3%	2%	15%	53.5
10/7-12	43%	21%	3%		4%	29%	47
10/13-19	54%	4%	8%	8%	14%	11%	36
10/21-26	67%	6%	7%		3%	15%	38.5
10/28-11/2	53%	23%	2%	5%	5%	12%	43

*Note: Total call time for the 5 week period: **30 hours***

Scheduling Guidelines

- In the 1st Quarter, weekends are not scheduled without permission from Michelle. No one but Jeff can ask Michelle for permission to schedule on weekends. In the 2nd Quarter, we propose adding every other Saturday to the work schedule, and in the 3rd Quarter and October, we recommend adding every Saturday to the schedule (or averaging 6 work days per week).
- Three nights of the work week may be scheduled. Two nights must be designated family nights. In 2nd and 3rd Quarter, we proposed four nights of the work week be scheduled.
- When possible, meetings in the morning and afternoon should be scheduled at home to avoid rush hour traffic. Certain call time can be scheduled at home (as long as call time metrics stay consistent).
- When possible, 30 minutes a day of email catchup/office cleanup is ideal.

- Jeff and Michelle meet weekly for 30-45 minutes.
- Jeff, Michelle, Monica and Kent meet weekly for 30 minutes.
- Monica, Michelle, Lauren, Jessica meeting weekly for 30 minutes to review upcoming schedule.
- Gordon and Michelle meet once a month.

Plan Requirements (NEED TO FILL THIS OUT MONDAY-WEDNESDAY)

Based on the plans provided by the team, we have the following objectives to meet in the schedule:

Finance

- 6-8 National Days per Quarter
- 3 DC Days
- 20 Hours Call Time per Week
- Additional Finance Time For:
 - National Finance Committee Meetings
 - Georgia Finance Committee Meetings

Political

- Travel to Media Market/Meet with Political VIPS/Constituency Outside Atlanta
 - 2x/Month = 1st Quarter
 - Market Priorities: TBD JEFF?
 - 3 x/Month = 2nd Quarter
 - Market Priorities: TBD JEFF?
 - Weekly = 3rd Quarter
 - Market Priorities: TBD BY RESEARCH
- 5 hours Political Call Time per Week
 - Meeting with Cong. Delegation in DC in January
 - Outreach call to House Members/1 per Qtr
 - Outreach call to Senator/1 per Qtr
 - Reception at Beginning of Legislative Session
 - Reception at Close of Session
 - January, April, August – call with Mayors
- One Dinner with Honorary Chairs Per Quarter

Communications

- 1.5 Hours/Week Q & A Practice (non EOQ Months)
- 15 minutes/Week stump speech review
- Weekly Message event (non EOQ month)
- Two “tour events” each Quarter
- Radio Interview Time Before Each Trip

Our Challenges

- We're not meeting our strategic goals:
 - Not Enough Time on Fundraising
 - Too Much Time on Office/Management

Memo

To: Michelle Nunn

From: [Your Name]

cc: Senior Staff & Strategy Team

Date: [Date]

Re: Mail Plan

How Do We Arrive At A Comprehensive Mail Plan?

First and foremost, we'll develop TWO mail plans: one that focuses on turning out supportive voters, primarily African-Americans; and a second that focuses on persuasion of key persuadable "swing" audiences that we absolutely must have in order to win the race.

A. Mail Aimed At Turnout

We will select African-American targets from the voter file who have presidential year only voter history, but have failed to vote consistently in mid-term elections, as well as those who are newly registered/moved to the state. We will look to polling data to help us consider messages for this audience that will motivate them to turnout in this specific election. But much of our communication here is likely to focus on providing educational information on locations, timing and convenience of voting options (as well as social pressure) in order to encourage them to conveniently and comfortably vote at early vote locations. For those who choose not to vote early, we will continue to do mail to push them to vote at the polls on Election Day.

While African-Americans will be the principal target for turnout mail, we will certainly look at other potential white and Hispanic targets, especially young white voters under 30. As we will discuss in the next section on persuasion, we will identify those white voters who are:

- a) very likely to be Nunn/Democratic supporters based on our modeling, and
- b) also have an inconsistent past voting history.

A skeletal outline of a turnout mail plan might look something like this:

Piece #1: Early Vote Period Opens Soon

Piece #2: Early Vote Period Has Started - See Convenient Locations Near You

Piece #3: Early Vote Ongoing - See Times/Locations

Piece #4: Early Vote Ending Soon - Use Your Most Convenient Option Now

GOTV #1: Motivational message on importance of voting

GOTV #2: Motivational message on importance of voting

GOTV #3: Polling place information and timing



Pieces created for the Obama campaign educating supportive voters on Early Vote locations and timing in order to increase turnout.

B. Mail Aimed At Persuasion

Mailing every voter in the state would be cost prohibitive and foolishly inefficient, since the majority of voters are *not* persuadable – they have relatively established partisan inclinations that won't be changed by any amount of persuasion.

But we must earn a certain minority of white voters – likely in the 30% range – in order to win the race. Mail can be used to target the most persuadable white voters who are open to hearing Michelle Nunn's message (and/or troubling information about our opponent). We will identify these persuadable “swing” voters using the modeling program described in Diane's memo. Essentially, the modeling program uses sophisticated large quantity voter survey information as well as other demographic, political and commercial data on the voter file to establish a mathematical likelihood of support for Nunn, as well as a likelihood of persuadability for all voters in the state. We will then select those who are most persuadable for mail communication that complements and enhances the television advertising.



Among the nine persuasion pieces created for the McCaskill campaign in 2012 and described in the enclosed detailed sample mail plan.

Our polling research may suggest targeted messages to these voters that are not being used on television, or it may suggest that we support television's 30 second messages with similar content, but enhanced by third-party validators, facts and figures, or other imagery and content that will add credibility to the message being delivered in both mediums.

Additionally, our persuasion mail plan will very likely include persuasion to the “spill” or inefficient media markets that will be too expensive for the campaign to purchase broadcast television. We will follow a similar path of identifying those persuadable voters in these markets, and then craft a series of pieces, based on polling research, that serve as the campaign's primary persuasion effort to that 8% of the state.

In contrast to the turnout targets, our persuasion targets will have demonstrated a consistent record of voting in all general elections. We don't want to waste any persuasion mail on a voter who may not vote and who is not yet solidly in our camp.

Just as television requires multiple airings of a TV spot for maximum impact, mail requires repetition in the mailbox for maximum persuasion. We have attached a sample persuasion mail plan from another campaign to give you a sense of what it might look like.

The bottom line is that this comprehensive plan will incorporate polling data on both messages and targets, timing of communication in other media, and the information available to us on the voter file (including vital modeling still to be done) and combine these elements into a strategic document that stipulates our recommendations for the message, target, quantity, cost, and timing of each mail piece.

C. Timing Of Plan Creation

Creating this initial strategic document requires an improved voter file, additional polling that helps us refine both messages and targets, and in the case of a general election plan, the determination of who our opponent is, as well as opposition research and polling on that opponent. Thus, the detailed general election mail plan is likely to be crafted immediately after the Republican primary/runoff and our subsequent in-depth research examination of our opponent. However, solid estimates of persuasion and especially turnout targets and budgets will be part of our ongoing evaluation and these estimates can be provided much earlier in the campaign.

Just as with the media plan, there will likely be adjustments and refinements to the plan as the campaign progresses, based on new polling, budgetary considerations, and developments in the campaign that demand action.



An Inexpensive Early Rural Strategy

We would create 4-5 small postcard-style mail pieces that incorporate Michelle and her family in rural settings with rural-oriented imagery. We would then develop a universe of rural “opinion makers” in each rural county in the state. From church pastors to school board members to local chamber of commerce boards to coaches, weekly newspaper publishers and local farm bureau representatives, we would create this list of roughly 100-300 “talkers” for each county.

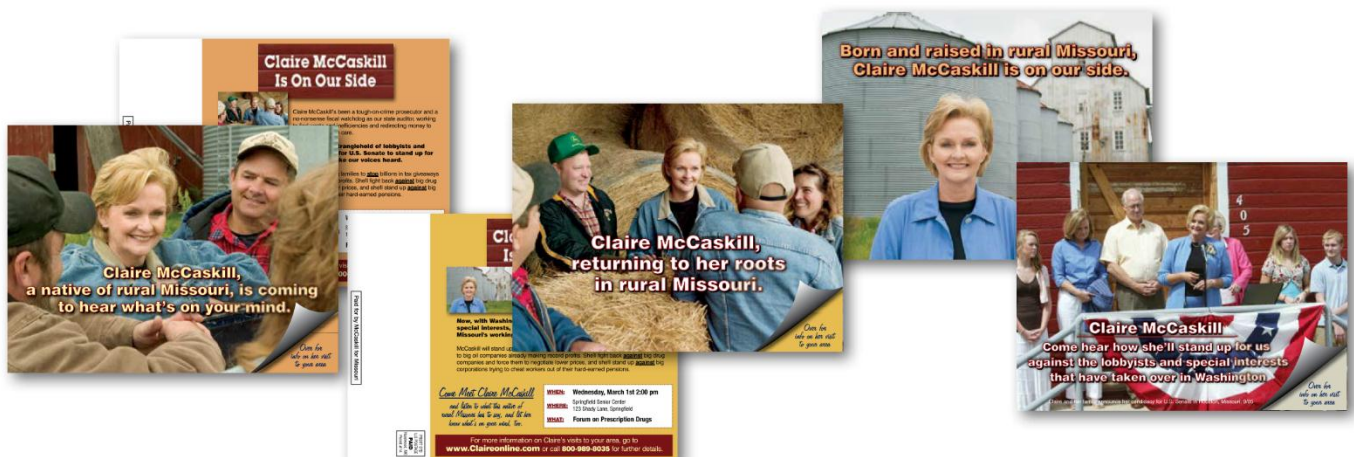
Whenever Michelle planned a public event in the vicinity, we would mail one of these cards to several counties surrounding the appearance, noting when and where she would be. After the event, we would send a different card noting her past appearance, where it has occurred and the topics discussed/news made.

Repeating this process throughout the state as Michelle makes occasional tours or individual stops in rural areas should serve to do the following:

- Combat the notion that she is an Atlanta-based candidate uninterested in, or unfamiliar with, the rural parts of the state.
- Create verbal back-and-forth in rural communities among their “talkers” about her appearances and the fact that she is taking the time to visit and compete for rural votes.

In general, we believe this is a relatively inexpensive means of creating an initial relationship with rural opinion makers and keeping them (and those they interact with in these small, close-knit communities) open to hearing more about Nunn as the campaign progresses. It’s a way of demonstrating through both perception and reality that Michelle, in contrast to many Democrats, is interested in, understands and will fight for the votes of rural voters in every corner of the state.

Similar cards used in the McCaskill 2006 race are pictured here:



Attachments

ATTACHMENT A: NUNN POLITICAL CALENDAR

November 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28 Thanksgiving Day	29	30

December 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20 Public School Last Day	21
22	23	24	25 Christmas Day	26	27	28
29	30	31 New Year's Eve				

January 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 New Year's Day First week – Peoples Pledge Rollout	2	3	4
5	6	7 Public School Start	8	9	10	11
12	13	14	15	16	17	18
19	20 M L King Day	21	22	23	24	25
26	27	28	29	30	31 YEAR END REPORTS DUE	

February 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6	7	8
9	10	11	12	13	14 Valentine's Day	15
16	17 Presidents' Day	18	19	20	21	22
23	24	25	26	27	28	

March 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3 Qualifying Period Begins	4 Mardi Gras Carnival Begins	5	6	7 Qualifying Period Ends	8 GA JJ Dinner (2 nd Saturday) - March 9, 2013
9 Daylight Saving Time Begins	10	11	12	13	14	15
16	17 St. Patrick's Day	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2 Democratic Primary Debate (Atlanta) - April 2, 2008	3	4	5 Deadline to transmit UOCAVA ballots
6	7 Public School Spring Break	8 Public School Spring Break	9 Public School Spring Break	10 Public School Spring Break	11 Public School Spring Break	12
13	14	15 FEC Quarterly Report Due	16	17	18 Good Friday	19
20 Easter Sunday	21	22 Earth Day	23	24	25	26
27	28	29	30			

May 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5 Cinco de Mayo	6	7	8	9	10
11 Mother's Day	12	13	14	15	16	17 Armed Forces Day
18	19	20 -Federal Primary Election Day -Last day of Public School	21	22	23	24
25	26 Memorial Day	27	28	29	30	31

June 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7 Deadline to transmit UOCAVA ballots
8	9	10	11	12	13	14 Flag Day
15 Father's Day	16	17	18	19	20	21
22	23	24	25	26	27	28
29 Democratic Primary Runoff Debate - July 29, 2008	30					

July 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4 Independence Day	5
6	7	8	9	10	11	12
13	14	15 FEC Quarterly Report Due	16	17	18	19
20	21	22 Federal Primary Runoff Election Day	23	24	25	26
27	28	29	30	31		

August 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12 Public School First Day	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 Labor Day	2	3	4	5	6
7	8	9	10	11 Patriot Day or 9/11 remembrance	12	13
14	15	16	17	18	19	20 Deadline to transmit UOCAVA ballots
21	22	23	24	25	26	27
28	29	30				

October 2014						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13 Columbus Day	14	15 FEC Quarterly Report Due	16 Televised Candidate Forum (Atlanta) October 16, 2008	17	18
19	20 Televised Debate (Albany) October 20, 2008	21	22	23	24	25
26	27	28	29	30	31 Halloween	

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13 Columbus Day	14	15 FEC Quarterly Report Due	16 Televised Candidate Forum (Atlanta) October 16, 2008	17	18
19	20 Televised Debate (Albany) October 20, 2008	21	22	23	24	25
26	27	28	29	30	31 Halloween	

November 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4 Federal General Election Day	5	6	7	8
9	10	11 Veterans Day	12	13	14	15
16	17	18	19	20	21	22 Deadline to transmit UOCAVA ballots
23	24	25	26	27 Thanksgiving Day	28	29
30						

December 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25 Christmas Day	26	27
28	29	30	31 New Year's Eve			

January 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 New Year's Day	2	3
4	5	6 Federal General Runoff Election	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Attachment C: Global Budgets & Expenditures

Global Budgets & Independent Expenditures

The 2012 Elections

	D	R	DSCC	NRSC	3 rd -D	3 rd -R
AZ	4,978,472	8,567,000	3,800,000	629,179	4,489,000	9,120,000
MA	23,767,000	30,281,000	0	0	3,293,000	1,594,000
MO	12,056,00	8,811,211	3,724,000	0	5,701,000	11,551,000
MT	3,693,000	3,839,000	3,731,000	3,900,000	8,286,000	11,778,000
ND	1,984,000	3,177,000	4,388,000	3,400,000	3,588,000	4,332,000
NV	6,142,000	5,724,000	5,571,000	3,660,000	8,397,000	10,840,000
OH	14,499,000	11,673,000	7,715,000	1,688,000	4,157,000	30,014,000
VA	8,939,000	6,427,000	9,657,000	6,800,00	9,591,00	24,330,000

Electing Michelle Nunn To The Senate – The Players

- ✓ Nunn For Senate
- ✓ Georgia Democratic Party
Coordinated Campaign
- ✓ DSCC IE
- ✓ Majority PAC/Other IE's

Electing Michelle Nunn To The Senate – The Players

✓ **Nunn For Senate**

- Lowest Unit Rate

✓ **Georgia Democratic Party Coordinated Campaign**

- Field: Volunteer Exemption – Printing, Mail
- Can accept unlimited transfer down from National Party Committee

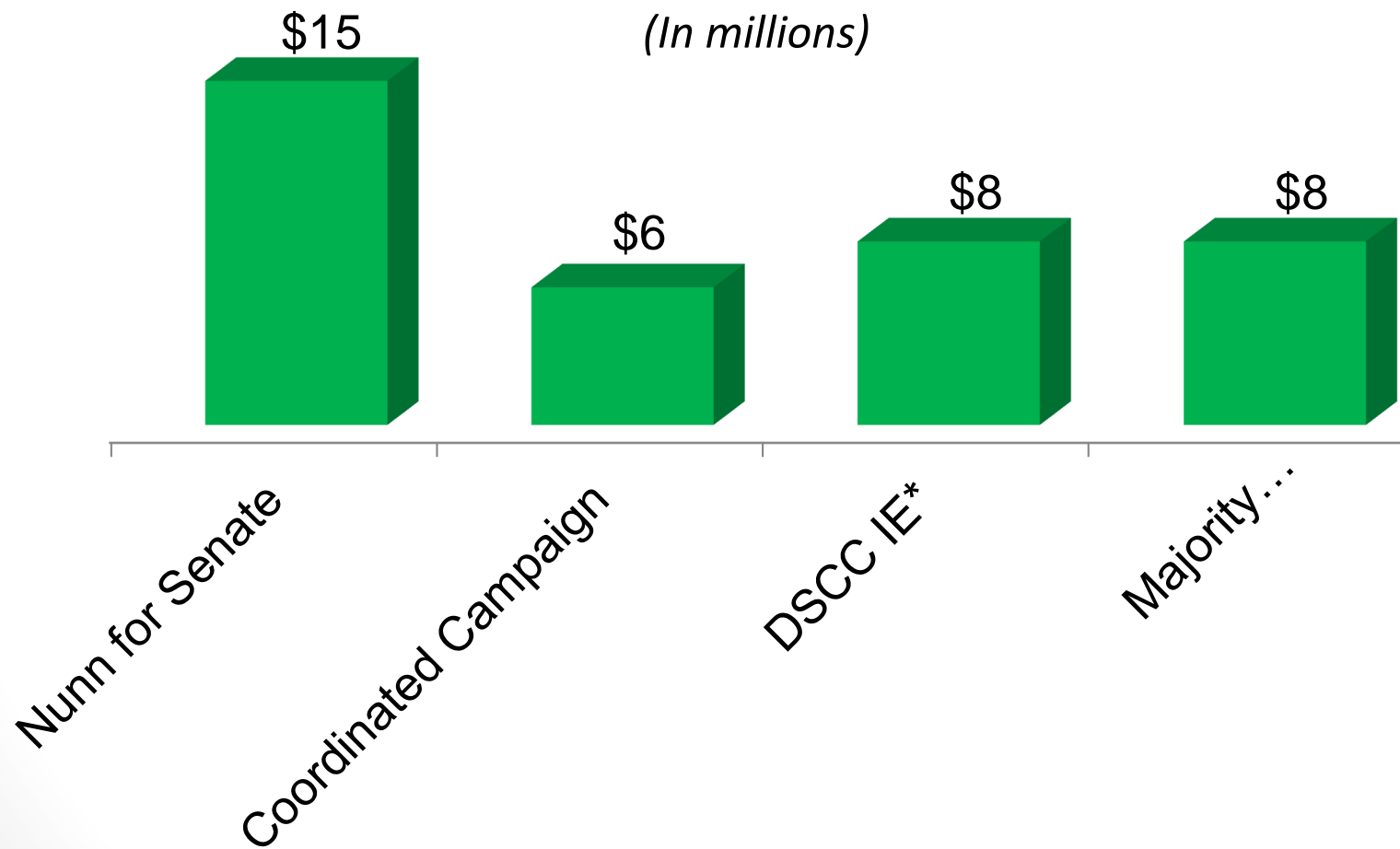
✓ **DSCC / IE [No Coordination]**

- \$1,383,000 441 (a)d Expenditures To Nunn For Senate (\$1 M Tally)
- Unlimited Transfers to Coordinated Campaign
- Unlimited DSCC Contribution to the IE Campaign of Television & Radio

✓ **Majority PAC/Other IE's [No Coordination]**

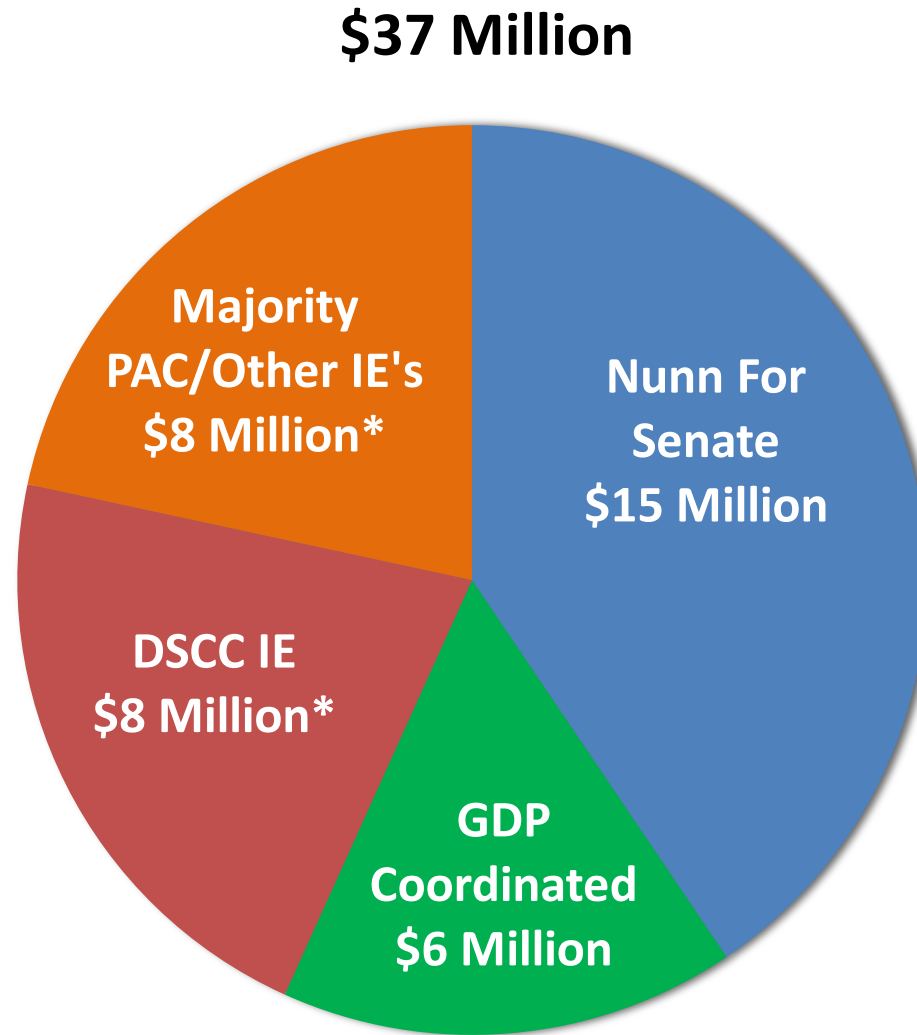
- No Contribution Limit
- Unlimited Television, Radio, Online Expenditures

“The Players” Budget Scenarios In A Highly Competitive Campaign



* Estimated spending based on competitive campaigns in previous election cycles

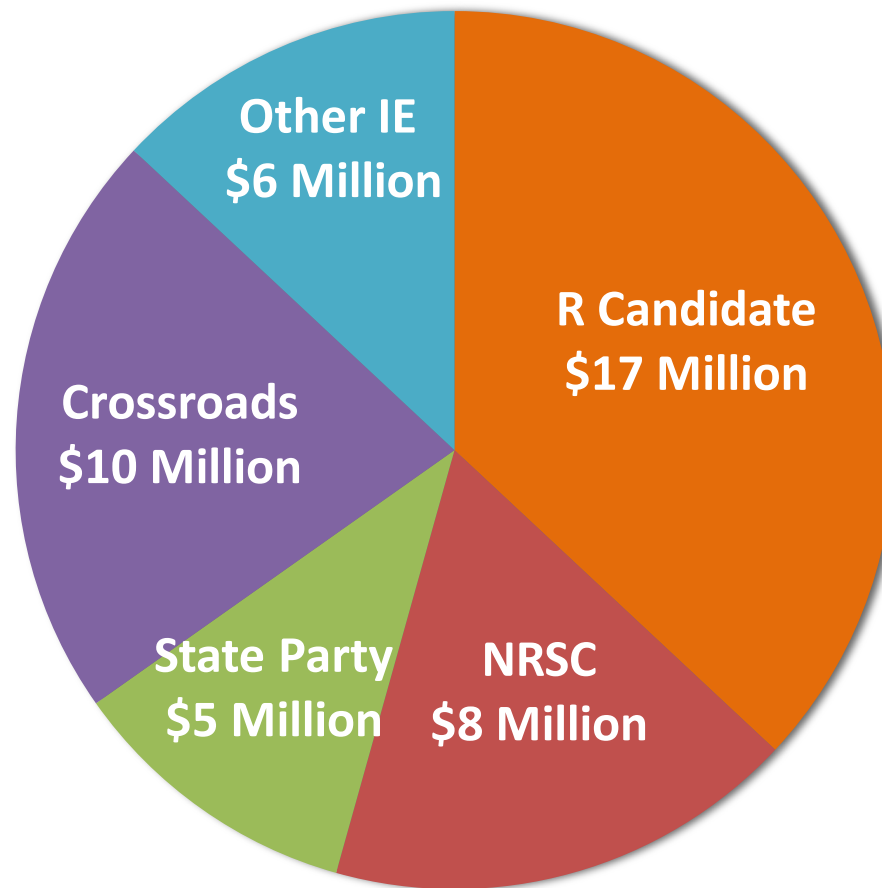
Potential Spending For Michelle Nunn



* Number estimated based on spending in competitive races in 2010/2012 cycles.

Players Are Same on Other Side

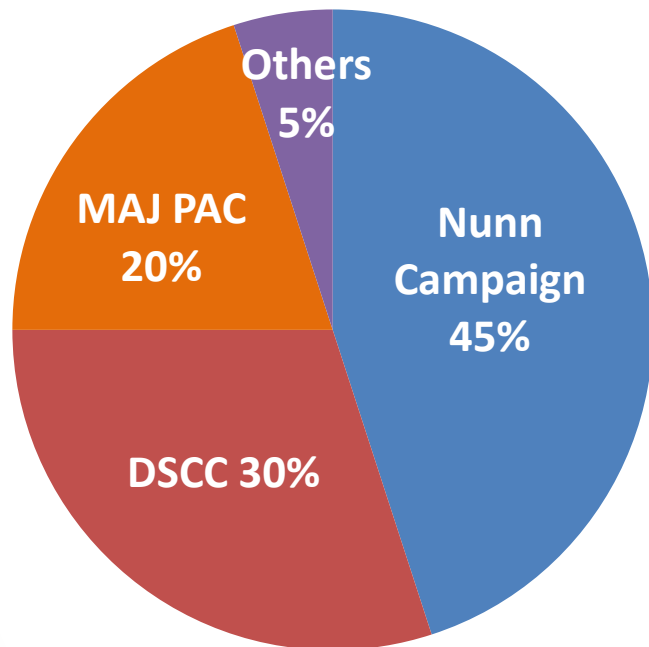
\$46 MILLION



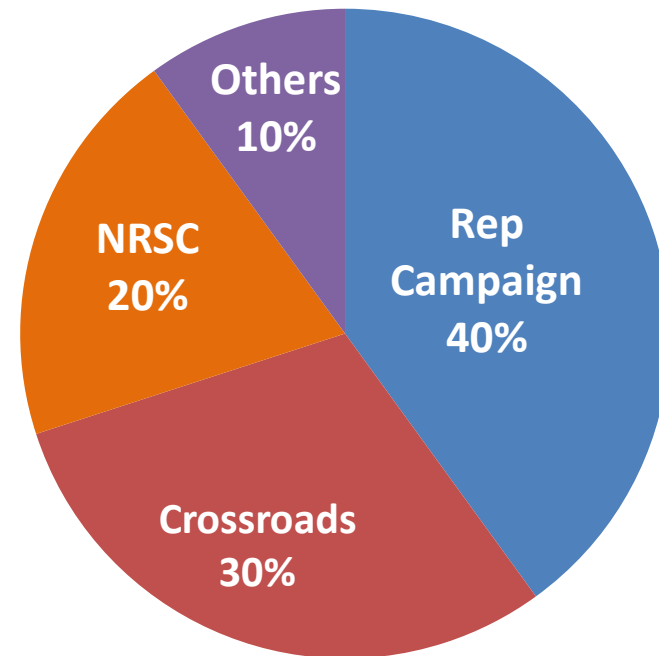
Only 20-25% Of All Impressions Will Come From Nunn For Senate

*Scenario: Total Spending
\$83 Million*

DEMOCRAT-\$37 M



REPUBLICAN-\$46 M



Only OUR campaign can communicate the narrative, establish Michelle's bio, character, and inoculate against the potential attacks.

Strategic Priorities

- ✓ Because we Only Control 20% of Overall Impressions = Message Discipline & Leadership
- ✓ Tracking the Other 80% of Messaging is Critical
- ✓ DSCC Partnership is Essential
- ✓ Coordinated Campaign Must Be Funded And Can Not Be a Summer of 2014 Project
- ✓ Nunn For Senate = 80% Budget on Media -TV/Radio (Lowest Unit Rate: 1 Nunn Ad =1.5 IE Ad)

Attachment D: DSCC Playing Field

This is a list of races the DSCC may invest in.

This is our collective “best guess” of the DSCC priorities 11 months before election day. A lot will change and races will move up and down in priority as we get closer to November.

We will continue to fight to receive funding and to move up in priority. The purpose of this list is simply to illustrate the playing field from the vantage point of the DSCC.

1. Mark Pryor	Arkansas	Incumbent	
2. Mary Landrieu	Louisiana	Incumbent	
3. Mark Begich	Alaska	Incumbent	
4. Kay Hagan	North Carolina	Incumbent	
5. Al Franken	Minnesota	Incumbent	
6. Jeanne Shaheen	New Hampshire	Incumbent	
7. Jeff Merkley	Oregon	Incumbent	COULD MOVE TO #11
8. Mark Udall	Colorado	Incumbent	COULD MOVE TO #12
9. Gary Peters	Michigan	Dem Open Seat	
10. Bruce Braley	Iowa	Dem Open Seat	
11. Michelle Nunn	Georgia	Rep Open Seat	COULD MOVE TO #9
12. Allison Grimes	Kentucky	Challenger	COULD MOVE TO #10
13. John Walsh	Montana	Dem Open Seat	
14. Natalie Tenant	West Virginia	Dem Open Seat	
15. Rick Weiland	South Dakota	Dem Open Seat	

Attachment E: Sample “Pushback” Document: Cancellation Notices

SUMMARY

The NRSC launched a series of web ads last week attempting to tie Michelle Nunn to the Affordable Care Act. Specifically, they hit Michelle for supporting a law that led to “400,000 Georgians losing their health care.” This stems from published reports that insurance companies are sending out cancellation notices to people in the individual insurance markets whose plans do not meet minimum standards set by the Affordable Care Act.

This attack is deceptive for a number of reasons. The first, and most basic, is that 400,000 Georgians will not be going without health insurance next year due to Obamacare. While insurance companies are sending cancellation notices to roughly 400,000 Georgians, most are expected to purchase new health insurance through the marketplace. Also, Georgia law allows individuals receiving cancellation notices to opt to renew their current coverage prior to Jan. 1st for another year.

More broadly, the number of people effected is quite small. The individual insurance market comprises only 6% of individuals in Georgia (and nationwide). Of that small group, most (71%) will be eligible for tax credits under the Affordable Care Act. Also, the majority of people in the individual insurance market use those plans as transitional measures – retaining coverage for a single year or less.

So the true number of individuals at risk of being “worse off” – that is, they do not receive tax credits *and* would otherwise retain their individual health plans, is tiny – merely 0.6% of the population in Ga. (and nationwide), or slightly over 50,000 individuals. And even those individuals will be receiving better health coverage – without annual caps on healthcare, coverage for pre-existing conditions, and limits on out-of-pocket costs.

Attack

NRSC attacked Nunn for supporting Obamacare, which led to a high number of cancelled insurance plans in Ga.

“GOP Targets Black Friday Shoppers in States With Critical 2014 Senate Races” The National Republican Senatorial Committee is launching an online and grassroots ad campaign today targeting shoppers in states with critical 2014 Senate elections. Customers out looking for deals may have more than just a leaflet featuring a discount television set on their windshield. Republican volunteers will be putting flyers on cars outside of shopping centers slamming Democratic candidates on the Affordable Care Act. The flyer ads, as well as an online ad campaign targeting Internet shoppers, will attack Democratic incumbent senators running for re-election in Louisiana and Alaska, and Democratic candidates running for open Senate seats in Michigan, Iowa and Georgia. [ABC, [11/26/13](#)]

Online Petition Page Targeting Nunn Criticizes Her Support For Law That Led To 400,000 Cancellations. “400,000 Georgians losing their health care isn’t a glitch or an unintended

consequence – that’s how Obamacare is SUPPOSED to work. Michelle Nunn is defending Obamacare despite these harmful effects on Georgia.” [NRSC.org, retrieved 12/1/13]

400,000 Residents Received Cancellation Notices Because Their Policies Do Not Meet Minimum Standards Set By The ACA. “Millions of Americans who buy their own health insurance are being informed that their policies will no longer be offered starting in the new year because they do not meet the higher standards of the Patient Protection and Affordable Care Act. The actual number of people receiving the notices is unclear, with data unavailable in half the states.” In Georgia, 400,000 people have reportedly received cancellation notices. [AP, [11/2/13](#)]

Pushback

PUSHBACK: Due To ACA Tax Credits, Majority Of Those Receiving Cancellation Notices Will Be Better Off; 99.6% Of Georgians Are Better Off Or Face No Changes

FamiliesUSA: “Most People with Plans in the Individual Market Will Qualify for Financial Help in Purchasing New, and Better, Insurance” “Nationally, 71 percent of people in the individual market under age 65 have incomes at or below 400 percent of poverty. Under the Affordable Care Act, these people are income-eligible for financial help to purchase an insurance plan, either through new premium tax credit subsidies or through expanded Medicaid. (See Table 2) Consumers with incomes that are too high for financial help (above 400 percent of poverty) represent the balance of those in the individual market.” [FamiliesUSA, [11/21/13](#)]

In Georgia, 71% Of Individual Insurance Market Eligible For Tax Credits.

FamiliesUSA reports that 330,000 out of the 466,000 residents in the individual insurance market are eligible for subsidies under the Affordable Care Act, that is, they are under age 65 with individual coverage and income at or below 400 percent of poverty. [FamiliesUSA, [11/21/13](#)]

FamiliesUSA: Less Than 1% Of Americans Will Be Paying More For The Same Coverage.

“A Fraction of Americans are at Risk of a Potentially Harmful Termination of Ongoing Individual Market Coverage. Approximately 29 percent of the individually insured have incomes above 400 percent of poverty and will not qualify for financial help with buying new coverage. Among that 29 percent, historically 35.5 percent—just 0.6 percent of all non-elderly Americans—retain ongoing individual coverage for more than a year. These are the only people who can lose the individual coverage they otherwise would have retained and who are not income-eligible for premium tax credit subsidies or Medicaid.” [FamiliesUSA, [11/21/13](#)]

In Georgia, Only 0.6% Of Residents At Risk Of Harmful Termination; 99.4% Better Off Or Face No Change.

FamiliesUSA reports that out of Georgia’s 8.6 million residents, a mere 0.6% are at risk of harmful termination due to Obamacare – that is, they are in the individual insurance market, they are not eligible for subsidies, and they would otherwise keep their policies. Thus, 99.4% of Georgians are either better off or face no change due to Obamacare. [FamiliesUSA, [11/21/13](#)]

PUSHBACK: The individual insurance market in Georgia effects only 6% of the population

Individual Insurance Market Only Includes 6% Of Georgians. “The cancellations you’ve been reading about involve individual policies — insurance for people aged 18-64 who don’t have a plan through an employer and have to buy their own. An individual insurance policy typically is a one-year contract that the insurer and customer may renew at the end of the year, or not...In any event, individual plans represent about 6 percent of the total insurance market in Georgia.” That is 595,000 people. [AJC, [10/30/13](#)]

Ga. Insurance Commissioner Puts The Number Of Individual Insurance Plans In Georgia At 404,669 “According to some news accounts, an estimated 11 million Americans buy their own health insurance. In Georgia, 404,669 people have health insurance through individual accounts, according to Hudgens’ office. Most of these Georgians are self-employed, work at companies that don’t provide insurance or are early retirees. Individual plans represent about 6 percent of the total insurance market in Georgia, the AJC has reported.” [PolitiFact, [11/27/13](#)]

Note: the cancellations also effect some small group plans.

PUSHBACK: Georgia is one of the states that will benefit the most from Obamacare tax credits – 650,000 residents expected to receive help

Over 650k Georgians Will Be Eligible For Tax Credits To Help Pay For Health Insurance. “More than 650,000 Georgians will be eligible for federal tax credits to help them pay for plans on the Health Insurance Marketplace, a new report shows. Georgia is among the states that stand to benefit the most from the credits, according to a study released Tuesday by the Kaiser Family Foundation. The Affordable Care Act created the credits as a way to lower costs for people who are uninsured or don’t get affordable coverage through their jobs.” [AJC, [11/5/13](#)]

PUSHBACK: 400,000 Georgians Not “Losing” Health Coverage, Many Will Switch To New Plans Or Extend Current Plans

Georgia Allows Consumers Faced With Switching Policies To Retain That Policy For An Additional Year. “But many Georgia consumers have an option if they are unhappy about losing their current policy: They can renew it before Jan. 1. This choice has largely gone unmentioned by the media during the outcry over cancellations. Most health insurers in Georgia are allowing consumers the option of renewing their current policies early, said Jay Florence, assistant commissioner of insurance. ‘Most insurers are trying to inform consumers of their options,’ Florence told GHN on Wednesday. If consumers are able to renew now, before Jan. 1, they can keep that policy into late 2014, according to health insurance industry officials. But at that point, policyholders will have to switch to a plan that complies with benefits requirements of the ACA.” [GPB, [11/7/13](#)]

Hudgens Said That Some Portion Of The 400,000 Will Not Lose Coverage, But Instead Have Plans “Modified” “State Insurance Commissioner Ralph Hudgens says as many as 400,000 Georgians who buy their own insurance could receive cancellations notices or have their plans modified as a result of the Affordable Care Act.” [AP, [10/30/13](#)]

Even Before Obamacare, Vast Majority Of Individual Plan Holders Keep Plans For Two Years Or Less. “Most individuals don't stay in the individual market very long: One study, published in the journal Health Affairs, found that 17 percent of individual market subscribers purchased the same plan for two straight years or longer.” [Washington Post, [10/29/13](#)]

PUSHBACK: Anyone that does need to get a new plan will have better insurance that caps out-of-pocket costs

Nationally, 97% Of Consumers Are The Same Or Better Off, Only 3% Will See Pricier Health Care, And Those Will Get Better Insurance. The New Yorker reports that three per cent of the population “will have to buy a new product that complies with the A.C.A.’s more stringent requirements for individual plans. A significant portion of these roughly nine million Americans will be forced to buy a new insurance policy with higher premiums than they currently pay. The primary reason for the increased cost is that the A.C.A. bans any plan that would require a people who get sick to pay medical fees greater than six thousand dollars per year. In other words, this was a deliberate policy decision that the White House and Congress made to raise the quality—and thus the premiums—of insurance policies at the bottom end of the individual market.” [New Yorker, [10/30/13](#)]