

Fundraising Operations Manual – SAMPLE

Maria Santos – CA-12 Democratic Primary – Sprint Execution System

DFX Intelligence · Operations Desk

April 10, 2026

SAMPLE DOCUMENT – This report uses entirely fictional / synthetic data to demonstrate DFX Intelligence deliverable format and methodology. No real individuals, donors, or campaigns are represented.

Classification: Campaign Internal – Not for Distribution **Timeline:** April 14 – July 13, 2026 (14 weeks / 6 sprints + close week) **Target:** ~\$1.2M cash on hand by July 15, 2026 FEC quarterly report

SECTION 1 – ENDORSEMENT PIPELINE TRACKER

These are the specific organizations to pursue, in priority order. Each endorsement is a capital event – it triggers bundling, IE potential, and downstream credibility. The campaign should be working all Tier 1 targets simultaneously starting week 1.

Tier 1 – Must-Lock by May 15 (Capital Multipliers)

#	Organization	What They Do	Why Santos Fits	Action Item	Deadline
1	National Progressive Women's Fund	Endorses and bundles for progressive Democratic women in competitive federal primaries. Major bundling network — average endorsed candidate receives \$150K–\$250K in bundled contributions.	Open-seat primary. Latina. Public defender biography. Criminal justice reform champion. First in family to attend college. NPWF has endorsed zero candidates in CA-12 — first mover gets the full bundling infrastructure.	Submit endorsement questionnaire immediately. Schedule candidate interview by April 21. Bring: State Assembly voting record on SB 1047 (criminal justice), AB 2190 (housing), fundraising trajectory, path-to-win memo.	Interview by April 21; decision target May 1
2	Latino Victory Project	Endorses, bundles, and runs IE for Latino/a candidates in competitive federal races. Building Latino caucus pipeline in Congress.	Latina. Daughter of immigrants. Criminal justice reform record. Only Latina in the CA-12 field. Open seat in a majority-minority district.	Direct outreach to Political Director. Frame: “first Latina to represent CA-12” + public defender biography + competitive primary + viability path. Request video meeting within 10 days.	PD meeting by April 21; endorsement target May 1
3	Working Families United PAC	National labor-aligned PAC. Endorses candidates with strong workers' rights records in competitive primaries. Bundling network of 200+ labor-connected donors.	Santos has a 100% lifetime labor voting score in the State Assembly. Sponsored the Warehouse Workers Protection Act and Fair Scheduling Act. Opponent Park has zero labor record; opponent Hargrove holds \$2M–\$5M in Meridian Defense Systems stock.	Call WFUPAC national political director this week. Santos likely has existing relationship through State Assembly labor coalition. Request endorsement meeting.	Endorsement target April 30
4	Alliance for Justice Action	National criminal justice reform PAC. Endorses candidates with demonstrated CJ	Santos was a public defender for 8 years. Authored the Second Chance	Submit endorsement application with voting record memo. Prepare	Application by April 18; decision target May 7

#	Organization	What They Do	Why Santos Fits	Action Item	Deadline
		reform records. Operates a bundler network among reform-minded attorneys and advocates.	Employment Act in the State Assembly. Only candidate in the field with a criminal justice practice background.	one-page summary: every CJ reform bill sponsored, co-sponsored, and voted on.	
5	SEIU Local 721	Public-sector workers union — largest local in Southern California. 95,000 members including thousands in the CA-12 footprint.	Santos's 100% labor score. Sponsored public-employee collective bargaining protections. Hargrove's Meridian Defense Systems holdings and Park's Commerce Dept background are anti-labor contrasts.	Direct outreach to Local 721 political director. Request candidate interview with executive board.	Endorsement target May 7
6	Planned Parenthood Action Fund (CA chapter + national)	Endorses and runs IE in federal races on reproductive health.	Pro-choice record. Represented domestic violence survivors as a public defender. "Firewall" narrative in current political environment.	Start with CA chapter. Submit questionnaire. Request endorsement meeting.	CA chapter target May 1; national target May 15
7	National Housing Justice Alliance	Endorses candidates with strong affordable housing records. Operates donor network among housing advocates, community development financial institutions, and fair-housing attorneys.	Santos authored the Community Land Trust Expansion Act and the Tenant Protection Act in the State Assembly. Housing affordability is the #1 issue in CA-12.	Submit endorsement application with housing legislative record.	Application by April 18; decision target May 7
8	Reproductive Freedom Coalition	National reproductive-rights endorsing and IE organization. Separate	Pro-choice record. Public defender who represented vulnerable women. Only candidate in the	Submit questionnaire. Prepare one-page voting-record memo on every	Questionnaire by April 18; decision target May 15

#	Organization	What They Do	Why Santos Fits	Action Item	Deadline
		endorsement track from Planned Parenthood.	field with this biography.	relevant State Assembly vote.	

Tier 2 – Lock by June 1 (Credibility + Bundling)

#	Organization	Action Item	Deadline
9	Equality California PAC	Submit endorsement application. Frame: civil-rights record, State Assembly votes on LGBTQ+ protections, intersectional justice record.	Application by April 25; target June 1
10	Higher Ground Leadership PAC	Outreach to national team. Frame: woman of color, first Latina from CA-12, working-family champion, daughter of immigrants.	Outreach by April 21; target June 1
11	California Nurses United	Direct outreach to political action committee. Santos's healthcare access votes in State Assembly. Major employer workforce across CA-12 hospitals.	Endorsement meeting by May 7; target May 21
12	League of Conservation Voters (CA + national)	Environmental endorsement. Santos's clean-energy and environmental justice votes. Hargrove's Apex Petroleum holdings (\$500K-\$1M) are the perfect contrast.	Endorsement questionnaire by May 1; target June 1
13	End Citizens United	Anti-self-funder, anti-dark-money PAC. Hargrove's ~\$1.5M self-funding is the exact profile they organize against.	Outreach by May 1; target June 1

Tier 3 – Pursue Through June (Network + Volume)

#	Organization	Action Item	Deadline
14	Sierra Club (CA chapter + national)	Environmental justice record + clean-energy transition	Target June 15
15	AFL-CIO (national)	After locking CA labor locals	Target June 15
16	National Education Association (NEA)	After locking California Teachers Association	Target June 15
17	Congressional Hispanic Caucus BOLD PAC	Latino caucus pipeline endorsement – pursue after Latino Victory Project endorsement is in hand	Target June 1
18	National Association of Criminal Defense Lawyers PAC	Legal profession identity network – Santos’s public defender biography	Outreach May 1

SECTION 2 – DONOR CITY TOUR: EVENT PLAN

Five cities. Two to three events per city trip (closed-door HNW dinner + identity-network event + mid-tier reception). 48 hours per city. Every trip yields \$40K–\$150K.

City 1: Riverside / Home District (Recurring)

Event Type	Audience	Venue Approach	Target Yield	Timing
HNW closed-door dinner	Local attorneys; progressive HNW donors; community development leaders; housing advocates	Private home in Riverside or Rancho Mirage. Host committee of 3–5 named hosts who each commit to raising \$10K.	\$40K–\$60K	Sprint 2 (April 28–May 11) – first of series; repeat monthly
Latino community celebration	Latino community leaders; small-business owners; neighborhood association leaders; faith community	Restaurant or community center in downtown Riverside. Bilingual event.	\$15K–\$25K + narrative value	Sprint 2
Criminal justice reform reception	Public defenders; legal-aid attorneys; reform advocates; formerly incarcerated community leaders	Law firm event space (donated) or public defender’s office conference facility	\$20K–\$35K	Sprint 3

Home district host committee targets: - Santos’s existing top State Assembly donors who can max out and invite peers - Riverside County Bar Association leadership (peer network) - Community Land Trust board members (housing advocacy network) - Latino Chamber of Commerce president (business community)

bridge) - Identify 2–3 progressive attorneys who are NPWF or Latino Victory Project bundlers in the Inland Empire

City 2: New York City

Event Type	Audience	Venue Approach	Target Yield	Timing
HNW closed-door dinner	National women-of-color attorney network; criminal justice reform funder boards; reproductive-rights donor network	Private home or law firm in Manhattan	\$50K–\$75K	Sprint 3 (May 12–25)
Criminal justice reform donor event	Vera Institute–adjacent donors; public defender alumni networks; reform philanthropy community	Nonprofit event space or law firm	\$25K–\$40K	Sprint 3
Latino professional reception	Hispanic National Bar Association members; Latino professionals in finance, law, media	Midtown event space	\$15K–\$25K	Sprint 3

NYC host committee approach: - Identify Santos’s law school classmates now practicing in NYC - Hispanic National Bar Association–NY leadership for professional event - Criminal justice reform philanthropy contacts (Ford Foundation–adjacent, Open Society–adjacent giving networks) - Immigration legal-services board members in NYC

City 3: Washington, DC

Event Type	Audience	Venue Approach	Target Yield	Timing
HNW closed-door dinner	Reproductive-rights national funders; Latino political infrastructure leadership; criminal justice reform donor network; progressive-institutional donor network	Private home in Georgetown or Capitol Hill club space	\$75K–\$100K	Sprint 4 (May 26–Jun 8)
Latino political network reception	Latino Victory Project board and donor network; Congressional Hispanic Caucus staff and allies; Latino policy professionals	Capitol Hill or Dupont Circle venue	\$20K–\$35K	Sprint 4
Policy-community briefing	Criminal justice reform policy professionals; housing policy advocates; reproductive-rights professionals	Think tank or nonprofit event space	\$15K–\$25K	Sprint 4

DC host committee approach: - Latino Victory Project ED (if endorsement is in hand) - NPWF bundler network (if endorsement is in hand) - Criminal justice reform advocacy network leadership (Justice Policy Institute, Sentencing Project, Campaign for Fair Sentencing of Youth) - Housing policy community (National Low Income Housing Coalition, Enterprise Community Partners)

City 4: Los Angeles

Event Type	Audience	Venue Approach	Target Yield	Timing
HNW closed-door dinner	Entertainment industry progressive donors; LA-based Latino HNW donors; reproductive-rights giving circles	Private home in Silver Lake / Los Feliz or West LA	\$50K–\$75K	Sprint 4 or 5 (late May / early June)
Latino community event	East LA community leaders; Latino professionals; labor-aligned donors	Restaurant or event space in Boyle Heights or East LA	\$20K–\$35K	Same trip
Clean-energy / environmental justice reception	Clean-energy executives; environmental justice advocates; climate philanthropy donors	Private home or event space in Santa Monica	\$15K–\$25K	Same trip

LA host committee approach: - Latino entertainment industry contacts (actors, writers, producers with political engagement) - East LA community organization leadership - Clean-energy industry executives in Southern California - Santos’s UC Riverside alumni network in greater LA

City 5: Miami

Event Type	Audience	Venue Approach	Target Yield	Timing
Latino HNW dinner	Progressive Latino donors in South Florida; attorney network; reproductive-rights donors	Private home in Coral Gables or Coconut Grove	\$35K-\$50K	Sprint 5 (Jun 9-22)
Professional network reception	Hispanic National Bar Association-FL members; Latino professionals in finance and law; inter-American business community	Brickell or downtown Miami event space	\$15K-\$25K	Same trip

Miami host committee approach: - Hispanic National Bar Association Florida chapter leadership - Progressive Latino business leaders in South Florida - Criminal justice reform advocates (Florida has a large reform community post-Amendment 4)

SECTION 3 – OPPOSITION CONTRAST MATERIALS (READY TO DEPLOY)

These are the specific contrast talking points for use in donor conversations. Each is grounded in verified public-record findings from the DFX due diligence briefs.

Contrast Sheet A: Santos vs. Hargrove (For Economic-Justice, Clean-Energy, and Anti-Self-Funder Donors)

Use when: Talking to labor leaders, environmental advocates, progressive donors, anti-self-funder donors, clean-energy executives.

Maria Santos	Thomas Hargrove
Public defender who represented indigent defendants for 8 years — immigrants, working families, people the system forgot	Venture capital partner at Sequoia Ridge Capital; no public-service career prior to candidacy
No disclosed corporate holdings or lobbying registration	Disclosed holdings: Meridian Defense Systems (\$2M–\$5M), Apex Petroleum (\$500K–\$1M), Paladin AI Technologies (\$1M–\$5M) — total disclosed portfolio \$8M–\$15M (House Clerk PFD)
Funded by grassroots and institutional donors	~\$1.5M self-funded out of ~\$1.7M total cycle inflows — “among the largest self-funders in a California congressional primary this cycle” (Riverside Herald 3/15/2026)
Authored Clean Energy Workforce Act in State Assembly	Holds \$500K–\$1M in Apex Petroleum while claiming to support clean-energy transition (PFD filing)
Authored Second Chance Employment Act — ban-the-box legislation for state employers	No public position on criminal justice reform; Meridian Defense Systems is a federal corrections and surveillance contractor
State Assembly 6 years; 47 bills authored or co-authored	Zero public-service experience; zero legislative record
Returned Progressive Alliance questionnaire with detailed policy positions	Did not return Progressive Alliance questionnaire (Riverside Herald endorsement tracker)
Total disclosed assets: (TBD — campaign to supply)	Total disclosed assets: \$8M–\$15M+ (PFD filing)

One-line donor pitch: “One candidate is a public defender who spent eight years standing next to people the system had given up on. The other holds \$2–\$5 million in a defense contractor that profits from the incarceration system. Who should represent this district in Congress?”

Contrast Sheet B: Santos vs. Park (For District-Rooted, Identity-Network, and Institutional Donors)

Use when: Talking to Latino donors, district-based donors, institutional endorsers evaluating field, progressive donors skeptical of DC establishment.

Maria Santos	David Park
State Representative for District 14 (Riverside) since January 2021 — continuously serving the district for 6 years	Commerce Department Deputy Assistant Secretary 2019–2023, then ran DC-based policy consulting firm; 4 years in Washington before returning for congressional run
Raised in Riverside; daughter of immigrants; first in family to attend college	Raised in Irvine; Stanford → Georgetown Law → Commerce Department → K Street consulting
Donor base: (target) district-rooted + institutional	2026 cycle: \$2.8M raised — donor geography heavily DC/national; claimed 95+ endorsements, predominantly DC establishment and national figures
Career pre-politics: public defender representing indigent defendants	Career pre-politics: Commerce Department trade policy; Pacific Rim Advisors LLC (trade consulting firm, \$1.2M annual revenue); multiple corporate board seats
No corporate consulting contracts or business conflicts	Founder/principal of Pacific Rim Advisors LLC, a for-profit trade consulting firm with corporate clients, while running for Congress (PFD filing)
Endorsements: (pending — building institutional base)	Endorsements: 95+ claimed, heavily weighted toward DC establishment — former cabinet officials, DC trade associations, national figures with no CA-12 connection
Campaign message: criminal justice reform, affordable housing, workers' rights	Campaign message: “bipartisan competence,” trade policy, deficit reduction — a positioning that avoids the district’s core progressive priorities

One-line donor pitch: “David Park raised \$2.8 million — most of it from DC and K Street. He’s running a Washington résumé campaign with 95 endorsements from people who don’t live here. Maria Santos has been showing up for this district for six years. This is a choice between DC connections and district roots.”

Combined 30-Second Frame

The 30-second frame for any audience:

“This race has three lanes. David Park is running a DC-establishment, national-money primary — \$2.8 million raised, 95 endorsements, almost all from Washington insiders who don’t live in this district. Thomas Hargrove is running a self-funded primary — \$1.5 million of his own money, millions in defense contractor and oil company stock. I’m running a working-family primary — a daughter of immigrants who became a public defender who became a state representative. The 12th District gets to decide which one of those belongs in Congress.”

SECTION 4 — SEGMENT-SPECIFIC CALL SHEET FRAMEWORKS

These are pre-loaded framing notes for each donor segment. The finance team should attach the relevant framework to every call sheet so the candidate knows the angle before dialing.

Call Sheet Framework: Institutional Endorser (NPWF, Latino Victory, Planned Parenthood, etc.)

Open: “Thank you for taking the time. I want to tell you about the race in CA-12 and why I believe this is exactly the kind of race [organization name] was built for.”

Frame (2 minutes): - Open seat — Congressman Whitfield retiring. Safely Democratic district — primary is the general. - Three-candidate field: DC-establishment frontrunner (Park, \$2.8M, 95 DC endorsements, national-money base); self-funded VC investor (Hargrove, \$1.5M self-funded, defense contractor and oil company stock); and me — daughter of immigrants, public defender, 6-year State Rep. - I am the only candidate in this field who is [a woman / Latina / a public defender with criminal-justice reform practice / etc. — match to organization’s mission]. - The path to victory is consolidating the progressive lane. I am the only candidate with the biography, the record, and the institutional support potential to do that.

Ask: “I’d like to pursue your endorsement. What does your process look like, and how quickly can we move?”

Close: “The July 15 FEC report is the viability test. Your endorsement before that date changes the trajectory of this race.”

Call Sheet Framework: Latino / Identity-Network Donor

Open: “I’m Maria Santos. My parents came to this country with nothing. I’m the first person in my family to go to college. I’m running for Congress — and if I win, I’ll be the first Latina to represent the 12th District.”

Frame (2 minutes): - My family’s story — immigrants, Riverside, public defender, State House. - This has never happened before. No Latina has ever held this seat. - I’m running against a self-funded venture capitalist with millions in defense contractor stock and a DC operative whose donors and endorsements are almost entirely from outside the district. - The Latino community has the power to make this happen. But it requires resources, and it requires them now.

Ask: “I’m asking you to be part of this. A max-out contribution of \$3,300 — or if you’re willing, to host or co-host an event in [city] in the next 30 days.”

Close: “This is the kind of moment that doesn’t come back if we let it pass.”

Call Sheet Framework: Criminal Justice Reform Donor

Open: “I spent eight years as a public defender. I want to talk to you about what it looks like to send someone to Congress who has actually been in the courtroom standing next to people the system is designed to grind up.”

Frame (2 minutes): - I represented people who couldn’t afford a lawyer. Immigrants facing deportation. Young people caught in mandatory minimums. Working parents who missed a court date because they couldn’t get off a shift. - In the State Assembly, I authored the Second Chance Employment Act. I authored sentencing reform for nonviolent offenses. I have a 100% score from the Alliance for Justice Action. - One of my opponents holds \$2–\$5 million in Meridian Defense Systems — a federal corrections and surveillance contractor. The other is a DC trade consultant with no criminal justice record. - If you believe the criminal justice reform movement needs allies in Congress who have actually done the work — not just endorsed the talking points — this is your race.

Ask: “I’m asking for \$3,300 and your network. Can we schedule a follow-up to talk about how to bring this to [your organization / your giving circle / your colleagues]?”

Close: “The July 15 number determines whether institutional support comes in behind me. Every dollar before that date counts double.”

Call Sheet Framework: Labor Leader

Open: “You know my record. I’ve been a YES vote on every labor priority since I took office. I’m calling because I’m running for Congress and I need labor to be with me.”

Frame (1 minute — these conversations are direct): - Hargrove: \$8M–\$15M in assets. Defense contractor stock. Oil company stock. Self-funded \$1.5M. Zero endorsements. Didn’t return the Progressive Alliance questionnaire. - Park: DC establishment. Trade consulting firm. Not a labor candidate. - I am the labor candidate in this race. Full stop.

Ask: “I’m asking for [local]’s endorsement. What’s the process and when can we get in front of the board?”

Close: “The primary is August 4. The money race is decided by July 15. Labor picking a candidate now — not in July — is the difference.”

Call Sheet Framework: Clean-Energy Executive

Open: “The Inland Empire is ground zero for the clean-energy transition in Southern California. I want to talk about what that means for the district — and why this race matters to the industry.”

Frame (2 minutes): - Solar and battery storage are multi-billion-dollar investments landing in the CA-12 footprint. Federal tax credits, permitting reform, grid infrastructure funding, and workforce development all run through Congress. - One of my opponents holds \$500K–\$1M in Apex Petroleum stock. The other is a DC trade consultant with no energy-policy record. - I support the clean-energy transition, and I believe it has to work for working families in the Inland Empire — good jobs, clean air, affordable energy. - The district needs a representative who is aligned with this industry and willing to fight for the federal policy framework that makes it work.

Ask: “I’m looking for support from clean-energy leaders — personally and through industry networks. Can we schedule a deeper conversation?”

SECTION 5 — FEC QUARTERLY INTELLIGENCE PLAYBOOK

April 15, 2026 — Q1 FEC Reports Drop

This is the first major intelligence event of the cycle. Park’s and Hargrove’s Q1 reports will update all fundraising numbers and provide full Schedule A donor-level data.

Action plan — execute within 48 hours of filing:

Hour	Action	Owner
0-2	Pull Park Q1 report and Hargrove Q1 report via OpenFEC API. Download full Schedule A (individual contributions) and Schedule B (disbursements).	DFX / data team
2-6	Parse Schedule A for both committees. Build sortable spreadsheet: donor name, employer, occupation, city/state, amount, date. Flag all contributions >\$1,000.	DFX / data team
6-12	Defectability analysis: Cross-reference Park and Hargrove donors against Santos's donor segment model. Score each donor for alignment: (a) employer in a Santos-aligned industry? (b) occupation matches a Santos segment? (c) prior multi-candidate giving? (d) geographic overlap with Santos's donor cities? Flag top 50 defectable prospects.	DFX
6-12	Contrast statistics: Calculate Park's % of money from outside CA-12 (test the "DC money" frame with hard data). Calculate Hargrove's self-funding % of total. Calculate average donation size for both. Prepare one-page contrast stat sheet.	DFX
12-24	Donor-tour intelligence: For each donor-tour city (Riverside, NYC, DC, LA, Miami), identify all Park and Hargrove donors in that metro area. Cross-reference with Santos's scheduled events. Identify donors who gave to opponents but who are in Santos-aligned segments — these are warm defection targets for the donor tour.	DFX
24-48	Campaign action: Finance team integrates defectable prospects into sprint pipeline. Candidate reviews top 20 defection targets for personal outreach. Press team pre-positions contrast statistics with local reporters (Riverside Herald, Inland Valley Daily, CA Political Review).	Campaign

July 15, 2026 — Q2 FEC Reports Drop

Same playbook, higher stakes. This is the report that determines the narrative for the rest of the summer.

Additional actions for July 15: - Pre-position a press memo with Riverside Herald, Inland Valley Daily, and CA Political Review the day before the filing: “Here is what Santos’s Q2 report will show” — with COH number, donor count, geographic breadth, endorsement list. - Prepare an immediate donor outreach burst for July 16–18: “The Q2 report just dropped. Here is where the race stands. Here is why your support in the next 30 days matters.” - If COH crosses the \$1.2M threshold: immediate outreach to NPWF IE, Latino Victory Project IE, and labor IE arms with the number and the ask for independent-expenditure commitment.

SECTION 6 — SPRINT-BY-SPRINT PIPELINE

Sprint 1: April 14–27

Theme: Launch. Institutional outreach begins. Existing donor file reactivation. First high-dollar calls.

Track	Specific Actions	Target Yield
Endorsements	Submit NPWF questionnaire. Email Latino Victory Project PD. Call WFUPAC national political director. Call SEIU Local 721 political director. Submit Planned Parenthood questionnaire. Submit Alliance for Justice Action application.	No revenue yet — building pipeline
High-dollar	Reactivate Santos’s top 25 State Assembly donors at federal max-out levels (\$3,300). Identify 10 warm-intro prospects from existing network for \$2,800 asks.	\$25K–\$40K
Events	Book Riverside HNW dinner for Sprint 2 (identify host committee of 3–5; each commits to raising \$10K). Book Latino community celebration for Sprint 2.	Booking only — revenue in Sprint 2
Digital	Launch ActBlue page optimized for “first Latina from CA-12” messaging. First 2 fundraising emails to existing list.	\$5K–\$10K
Intelligence	Pull Park and Hargrove Q1 FEC reports (April 15). Complete defectability analysis within 48 hours. Deliver contrast stat sheet to finance team.	Intelligence product, not revenue

Sprint 1 total target: \$30K–\$50K

Sprint 2: April 28 – May 11

Theme: First endorsements convert. First donor events. Bundler activation begins.

Track	Specific Actions	Target Yield
Endorsements	NPWF endorsement interview. Latino Victory Project meeting. WFUPAC board vote. SEIU Local 721 meeting. PP Action Fund CA chapter meeting.	Endorsement revenue begins flowing in Sprint 3
High-dollar	30 high-dollar calls/week (candidate). Focus on warm-intro prospects from existing network + defectable opponent donors flagged in Sprint 1 intelligence.	\$35K-\$50K
Events	Execute Riverside HNW dinner (\$40K-\$60K target). Execute Latino community celebration (\$15K-\$25K target). Book NYC trip for Sprint 3.	\$55K-\$85K
Mid-tier	Launch first mid-tier house party series in CA-12 (Riverside, Corona, Moreno Valley — 3 events, \$5K-\$10K each).	\$15K-\$30K
Digital	2 emails/week. First endorsement announcement email (if WFUPAC closes).	\$8K-\$12K

Sprint 2 total target: \$113K-\$177K | Cumulative: \$143K-\$227K

Sprint 3: May 12-25

Theme: Bundler cascade begins. National donor tour launches. Institutional capital starts flowing.

Track	Specific Actions	Target Yield
Endorsements	Close NPWF (if not Sprint 2). Close Latino Victory Project. Close Reproductive Freedom Coalition. Submit Equality California PAC, Higher Ground, LCV applications. Close California Nurses United.	Endorsement announcements drive bundler activation
High-dollar	35 calls/week. Begin calling NPWF bundler referrals. Begin calling Latino Victory Project donor referrals.	\$50K-\$70K
Events	Execute NYC trip (3 events over 48 hours: HNW dinner \$50K-\$75K; CJ reform donor event \$25K-\$40K; Latino professional reception \$15K-\$25K). Execute second Riverside event (criminal justice reform reception \$20K-\$35K). Book DC trip for Sprint 4. Book LA trip for Sprint 4 or 5.	\$110K-\$175K
Bundling	Activate first wave of bundlers from NPWF and Latino Victory networks. Target: 5 bundlers, each committing to raise \$10K-\$25K.	\$50K-\$125K (flows over Sprints 3-5)
Digital	Endorsement announcement emails. "First Latina from CA-12" earned-media pitch to Latina Magazine, NBC Latino, Politico Playbook.	\$12K-\$18K

Sprint 3 total target: \$160K-\$230K | Cumulative: \$303K-\$457K

Sprint 4: May 26 – June 8

Theme: Peak institutional yield. DC and LA trips. Defensive-donor segment activation.

Track	Specific Actions	Target Yield
Endorsements	Close Equality California PAC, Higher Ground, LCV, End Citizens United.	Bundler network expands
High-dollar	35 calls/week. Reproductive-rights donor network activation. Clean-energy executive outreach begins.	\$60K–\$85K
Events	Execute DC trip (3 events: HNW dinner \$75K–\$100K; Latino political reception \$20K–\$35K; policy-community briefing \$15K–\$25K). Execute LA trip (HNW dinner \$50K–\$75K; Latino community event \$20K–\$35K; clean-energy reception \$15K–\$25K).	\$195K–\$295K
Bundling	Second wave of bundlers activated from Equality California, Higher Ground, labor, and reproductive-rights networks. Target: 5 additional bundlers.	\$50K–\$125K (flows over Sprints 4–6)
Digital	Opponent-contrast email series (Hargrove self-funding and defense contractor stock; Park DC-money base).	\$12K–\$18K

Sprint 4 total target: \$230K–\$330K | Cumulative: \$533K–\$787K

Sprint 5: June 9–22

Theme: Volume acceleration. Miami trip. Third-wave bundling. Fence-sitter conversion begins.

Track	Specific Actions	Target Yield
High-dollar	35 calls/week. Fence-sitters from Sprints 1–3 get urgency push: “July 15 is 3 weeks away.” Defectable opponent donors get second outreach.	\$65K–\$85K
Events	Execute Miami trip (Latino HNW dinner \$35K–\$50K; professional reception \$15K–\$25K). Third Riverside event (progressive HNW giving circle dinner \$25K–\$40K).	\$75K–\$115K
Bundling	All active bundlers receive “30-day push” ask: close outstanding pledges, bring one new max-out prospect each.	Incremental \$20K–\$40K
Digital	Deadline urgency email series: “31 days to July 15.” Earned media from Miami trip.	\$12K–\$20K

Sprint 5 total target: \$172K–\$260K | Cumulative: \$705K–\$1.047M

Sprint 6: June 23 – July 6

Theme: Final sprint. Close everything. Every outstanding commitment converts or dies.

Track	Specific Actions	Target Yield
High-dollar	40 calls/week. Every outstanding pledge gets a close call. Every warm prospect gets a final push. Candidate personally calls top 20 uncommitted prospects.	\$85K–\$110K
Events	Final Riverside HNW dinner (\$40K–\$60K). Final DC phone-a-thon (candidate + 2 phones, 4 hours, targeting uncommitted DC-based prospects).	\$65K–\$100K
Bundling	Final bundler push: “What you raise by July 13 shows up on the report. What you raise on July 16 doesn’t.”	\$20K–\$40K
Digital	Deadline countdown email series: “18 days... 11 days... 5 days... 48 hours.”	\$15K–\$25K

Sprint 6 total target: \$185K–\$275K | Cumulative: \$890K–\$1.322M

Close Week: July 7–13

Theme: Wire transfers. Last conversions. Q2 report prep.

Action	Detail
Confirm all outstanding pledge conversions	Finance director calls every pledged donor who has not yet sent a check or completed ActBlue transaction
Wire transfer coordination	Any HNW donor or bundler with outstanding commitments >\$5K gets wire transfer instructions
Q2 report prep	Pre-position press memo with Riverside Herald, Inland Valley Daily, CA Political Review: COH number, donor count, endorsement list, geographic breadth
IE outreach prep	Draft memo to NPWF IE, Latino Victory Project IE, and labor IE arms with the Q2 number and a formal request for independent expenditure commitment

Close week target: \$40K–\$80K | Final cumulative: \$930K–\$1.402M

SECTION 7 – WEEKLY INTELLIGENCE REQUIREMENTS

What DFX delivers to the campaign every week to keep the system running.

Monday Morning Brief (Delivered by 9 AM)

Item	Content
Opponent tracker	Any new endorsements, press coverage, campaign events, or social media activity from Park or Hargrove in the past 7 days
Press scan	Headlines and key passages from Riverside Herald, Inland Valley Daily, CA Political Review, Sacramento Bee political desk, Los Angeles Times political desk — anything touching the CA-12 race
Donor landscape update	Any new publicly reported fundraising milestones, PAC spending, or IE activity in CA-12
Sprint pipeline status	Updated prospect list for the current sprint; which calls were made last week, which converted, which need follow-up
Opportunity flags	Any news cycle, national event, or filing that creates a time-sensitive fundraising opportunity (e.g., a Hargrove PFD story that activates the anti-self-funder narrative)

Quarterly Filing Intelligence (April 15, July 15)

Full FEC analysis as described in Section 5 — delivered within 48 hours of filing.

Ad Hoc Alerts

Immediate notification and recommended response for: - Any new endorsement for Park or Hargrove - Any negative press story about Santos - Any new Hargrove PFD filing or amendment - Any Park or Hargrove debate challenge or major campaign announcement - Any national political event that creates a fundraising window (Supreme Court decision, executive order, etc.)

SECTION 8 — PRE-BUNK: SANTOS'S OWN OPPOSITION FILE

Before opponents do it, the campaign should have answers ready for every attack line.

Likely Attack	Source	Prepared Response
“She’s just a state legislator — no federal experience”	Park campaign (most likely)	“I’ve been in the courtroom fighting for people who couldn’t afford a lawyer. I’ve been in the State House writing the laws. My opponent’s federal experience is running a trade consulting firm on K Street. Mine is doing the work.”
“Can’t compete financially — underfunded”	Media framing	(Pre-empt by hitting the July 15 number. If asked before then:) “We’re building a campaign funded by working families, not DC lobbyists or personal wealth. The July 15 report will speak for itself.”
“Criminal justice reform means soft on crime”	Hargrove campaign (most likely)	“I was a public defender. I know the justice system from the inside — the parts that work and the parts that are broken. Safe communities and a fair system are not in conflict. My opponent holds millions in stock in a company that profits from incarceration. I’ll let voters decide who has the conflict of interest.”
“Too progressive for a general election”	Park campaign or media framing	“This is a safely Democratic district. The primary is the general. And last I checked, affordable housing, criminal justice reform, and workers’ rights aren’t radical ideas — they’re what the people of this district actually need.”
“Inexperienced fundraiser — can’t build a war chest”	Pundit commentary	“Every first-time congressional candidate starts somewhere. I have institutional support, a grassroots donor base, and a story that resonates. The money follows the movement.”
State Assembly voting record attack (specific vote TBD)	Any opponent	(Campaign must pull Santos’s own roll-call history and pre-bunk any votes that could be taken out of context. DFX to provide this analysis by April 30.)

Deliverable due by April 30: Full self-opposition research file. Every State Assembly roll-call vote, every public statement, every financial disclosure. Santos should know what her opponents will find before they find it.

SECTION 9 — EARNED-MEDIA PLAN (FUNDRAISING-ADJACENT)

Earned media does not directly raise money, but it creates the credibility signals that make every donor call easier. These are the specific stories to place.

Story 1: “First Latina from CA-12 – The Public Defender Running for Congress”

Target outlets: Latina Magazine, NBC Latino, Politico Playbook, Sacramento Bee, Los Angeles Times

Timing: Coordinated with Latino Victory Project endorsement (Sprint 2–3) **Hook:** “If she wins, Maria Santos would be the first Latina to represent California’s 12th Congressional District. Her parents came to this country with nothing. She became a public defender.” **Why it matters for fundraising:** National earned media activates the Latino donor diaspora and creates inbound donor interest that the finance team converts.

Story 2: “The Self-Funder’s Portfolio: Defense Contractors and Oil Companies”

Target outlets: Riverside Herald, Inland Valley Daily, CA Political Review **Timing:** After April 15 FEC reports (Sprint 2) **Hook:** “The CA-12 primary is shaping up as a test case: Thomas Hargrove has self-funded \$1.5 million — while holding millions in defense contractor, oil company, and AI surveillance stock. His opponent is a public defender who represented indigent defendants.” **Why it matters for fundraising:** Activates anti-self-funder donors. Positions Santos as the underdog champion. Creates the narrative frame that makes every donor pitch land harder.

Story 3: “95 Endorsements, But From Where?”

Target outlets: Riverside Herald, Inland Valley Daily (local first — statewide follows) **Timing:** After April 15 FEC reports confirm Park’s donor geography is heavily DC/national **Hook:** Geographic analysis of Park’s endorsement list and donor base — what percentage are from CA-12 versus Washington and national? **Why it matters for fundraising:** Reinforces the “district roots vs. DC money” contrast. Makes Park’s frontrunner status feel hollow to donors considering both candidates.

Story 4: “Labor Picks Its Candidate”

Target outlets: Riverside Herald, Inland Valley Daily, CA Political Review, Sacramento Bee **Timing:** Coordinated with first labor endorsement cluster (Sprint 2–3) **Hook:** “Three major labor unions endorsed Maria Santos today, drawing a sharp contrast with the two frontrunners in the CA-12 primary — one a self-funded venture capitalist, the other a DC trade consultant.” **Why it matters for fundraising:** Labor endorsement validates the “working-family candidate” positioning. Triggers downstream labor-aligned donor and bundler activation.

SECTION 10 — CAMPAIGN INFRASTRUCTURE REQUIREMENTS

This execution plan requires the following to be in place. Items not yet in place should be resolved by April 21.

Requirement	Status (Campaign to Fill)	Action if Not in Place
Finance Director with federal primary experience	<input type="checkbox"/> In place / <input type="checkbox"/> Needs hire	Hire immediately. This is the rate-limiting staff role. Without a FD who can run the sprint system, execute call sheets, manage events, and process pledges at speed, the plan underperforms.
ActBlue page optimized for the race	<input type="checkbox"/> Live / <input type="checkbox"/> Needs setup	Set up by April 14. Needs: candidate photo, biography, donation tiers (\$25 / \$50 / \$100 / \$250 / \$1,000 / \$2,800 / \$3,300).
Email list (existing State Assembly donor file + supporters)	<input type="checkbox"/> Imported / <input type="checkbox"/> Needs import	Import into email platform (ActionNetwork, Mailchimp, or campaign CRM) by April 14.
CRM / donor tracking	<input type="checkbox"/> In place / <input type="checkbox"/> Needs setup	NGP VAN, ActBlue dashboards, or equivalent. Must be able to track prospect status, pledge amounts, conversion dates, and sprint assignments.
Candidate calendar blocked for fundraising	<input type="checkbox"/> Blocked / <input type="checkbox"/> Needs scheduling	Block 4–5 hours/day (Tue–Thu) for call time. Block 1 event slot per weekend. Block 2-day windows for each donor-tour city trip. Non-negotiable for 14 weeks.
Compliance counsel	<input type="checkbox"/> Retained / <input type="checkbox"/> Needs retention	Federal campaign finance compliance. Must be in place before first bundled event.
Santos’s own FEC data (Q4 2025 and Q1 2026 when filed)	<input type="checkbox"/> Available / <input type="checkbox"/> Needs pull	Pull from FEC.gov. Populate the “TBD” fields in the competitive landscape table. This is the most important data-quality task in the next 48 hours.
Self-opposition research file	<input type="checkbox"/> Complete / <input type="checkbox"/> Needs completion	Due April 30. Every roll-call vote, every public statement, every financial disclosure.

This is a working document. It will be updated at the start of each sprint with adjusted targets, new intelligence, and refined pipeline priorities. The system is only as good as the execution it drives — and the execution is only as fast as the campaign’s responsiveness to the weekly cadence.

DFX Intelligence — Campaign Internal. Not for distribution.