

MEMORANDUM

TO: DA Board of Directors
FROM: Gara LaMarche, President and Julie Kohler, Managing Director
RE: Pre-conference Board Meeting
DATE: April 24, 2014

We are looking forward to seeing most of you in Chicago next week for our spring investment conference. As you know, the Board will meet before the conference begins, from 12:30-2:30 p.m. CT in the Board Room (1528) at the Ritz-Carlton, A Four Seasons Hotel.

We will devote most of our Board meeting to previewing the final conference agenda to you and discussing the opportunities that the conference provides for us to advance broader goals – recruitment of new Partners, better alignment with allied funders, and strategic conversations around the DA's vision and investment strategy as we enter our second decade of work.

Attendance at the spring conference is strong, and we have approximately 14 new prospects attending portions of the conference as "sneak peeks" or special guests for the final day of the conference, which we billed as a "National Funders' Convening." Gara's extensive travels over the past several months and meetings with Partners have provided incredibly valuable input into the next iteration of the investment strategy, and we're excited to engage the full Partnership in a discussion of what it would take to "lift our sights" and begin to shift our orientation from an organization-focused investment approach to a "movement-centered" approach. Under Tab 5 in your Board book, please find the text of the speech that Gara will deliver at the Partner Forum, as well as the description of the investment process, which will be shared with Partners.

Although most of our Board business will be conference-focused, Board nominations did also open up this past week and run through May 2nd. A few Partners have signaled plans to/interest in running for the Board this year, and we would encourage all of you to reach out to them to discuss Board service with them in greater detail. We'll then adjourn to a brief Executive Session.

Safe travels, and see you in Chicago.



Board Meeting

February 13, 2014

12:30 p.m. – 2:30 p.m. ET

Call-in Number: 1-800-977-8002; 201606#

The Ritz Carlton, a Four Seasons Hotel

The Board Room - 1528

160 E Pearson St, Chicago, IL 60611

- I. Welcome & Approve February Minutes (12:30-12:35 p.m.)
- II. Conference walkthrough (12:35-1:00 p.m.)
 - A. Welcome Reception
 - B. Business Session and Partner Forum
 - C. Intentions Session
 - D. National Funders' Convening
- III. Investment Strategy Update (1:00-1:30 p.m.)
 - A. Vision 2020 Committee
 - B. Investment Process Overview
- IV. Membership Update (1:30-1:45 p.m.)
 - A. New Member/Sneak Peak/National Funders' Convening Attendee bios
 - B. Conference Friends/Mentors
- V. Board Elections Update (1:45-2:00 p.m.)
- VI. Press Issues (2:00-2:15 p.m.)
- VII. Executive Session (2:15-2:30 p.m.)
 - A. Board Updates
 - B. Staff Updates



DEMOCRACY ALLIANCE MINUTES OF THE MEETING OF THE BOARD OF DIRECTORS

**Board Call
February 13, 2014**

A meeting of the Board of Directors of Democracy Alliance (“the Alliance”) was called on February 13, 2014. The following directors were in attendance, constituting a quorum:

David desJardins
Paul Egerman
Jim Gollin
Nick Hanauer
Mary Kay Henry
Gara LaMarche
Rob McKay
Cookie Parker
Steve Phillips
John Stocks
Ted Trimpa

Also attending were Julie Kohler, Rob Stein, and Wendi Wallace.

Mr. McKay opened the meeting by welcoming everyone referencing the memo that Mr. LaMarche had circulated in advance of the meeting, summarizing the feedback he received from his conversations with Partners and other movement leaders and outlining some thoughts about the future direction of the DA. After some discussion, Ms. Kohler, pivoted the conversation to the next investment process. Among the Board, there was interest and consensus around the following points:

- The time has come to evolve our strategy of investing in the progressive infrastructure to the next level by developing an updated theory of change that identifies the most pressing needs for building a more progressive America.
- The next investment strategy should focus less on organization-building and more on identifying key issues/movement gaps that, with proper investment, could have demonstrable impact over a specified time period (e.g., 3, 5, 10 years).
- The task of an Investment Committee and staff should shift from identifying and monitoring “anchor” organizations that, if well-supported, could build and strengthen the progressive infrastructure to identifying concrete ways that infrastructure could be built out and/or deployed in order to affect change.
- The emphasis of this work should be more structural/systemic than issue-oriented.

Mr. LaMarche then walked the Board through the proposed investment process timeline. There was general agreement to have a small committee comprised of Board members and Partners and to complete by the time of the fall conference. Mr. McKay stated that the next steps conversation would take place with the Executive Committee.

Mr. LaMarche then shared the framework for the upcoming spring conference with the Board. After getting the Board’s general support for some event with OFA during the

conference the discussion moved to the climate summit. Ms. Kohler and Mr. LaMarche explained the early thinking behind the summit and the proposed timing.

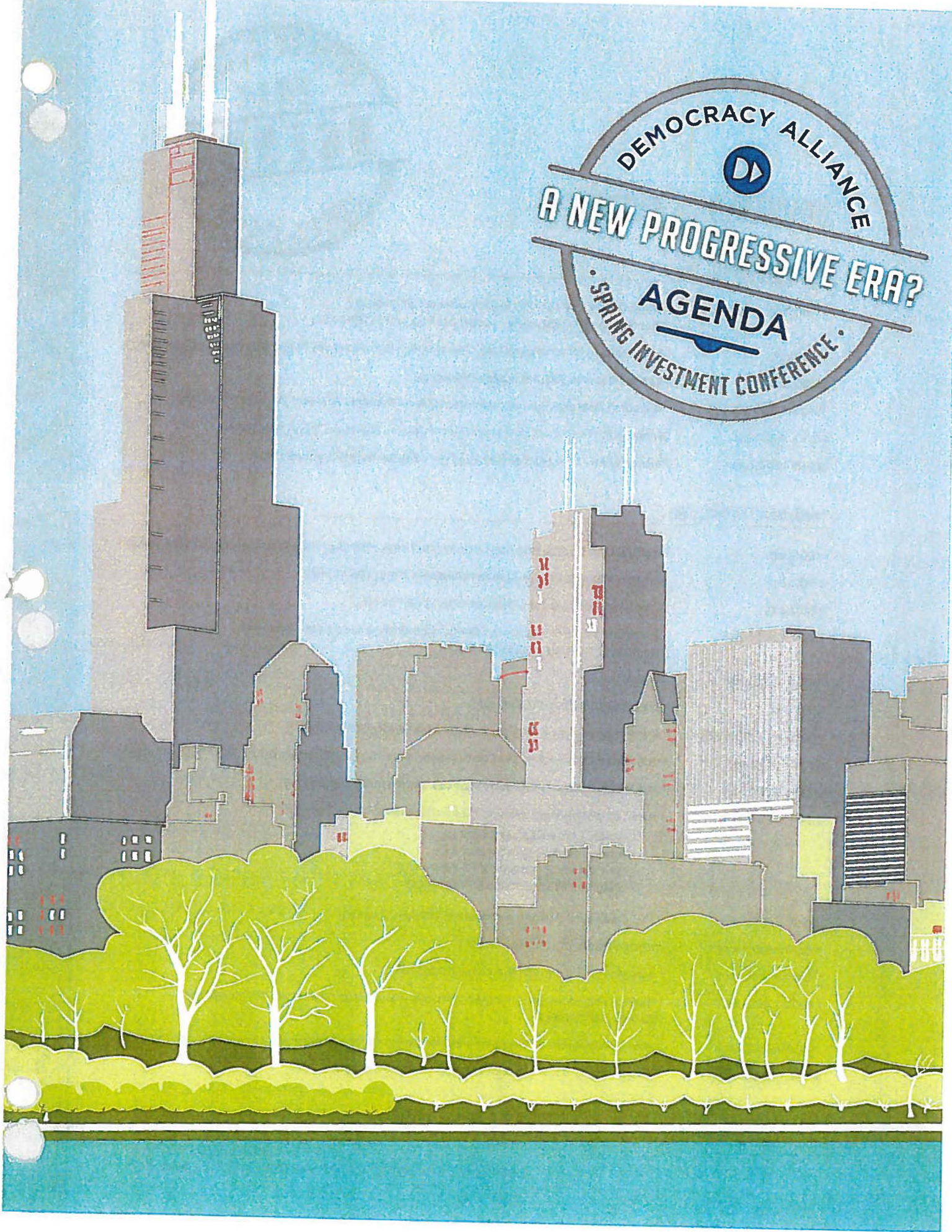
Ms. Kohler then walked the Board through a proposed change to the By-laws.

Upon a motion duly made and seconded, it was

RESOLVED, to amend the DA By-laws to list President rather than President and Managing Director, thereby reflecting the DA's current staffing structure.

Ms. Kohler then spoke briefly about the Board self-assessment form that Weston Milliken, Chair of the Governance Committee had prepared, and the upcoming Board elections. The results of the Board self-assessment will be discussed at the June retreat, and Board members were encouraged to send ideas about potential Board candidates to the Governance Committee.

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DEMOCRACY ALLIANCE
A NEW PROGRESSIVE ERA?
AGENDA
SPRING INVESTMENT CONFERENCE





CONFERENCE OVERVIEW

SUNDAY, APRIL 27

- 10:15 a.m. - 12:00 p.m. Optional: Private Tour of the Art Institute of Chicago (Shuttle departs from Lower Lobby at 10:15 a.m.) [Off-site]
- 3:00 p.m. Registration & Information Desk Opens and "Unconference" Sign-Ups Begin [Promenade]
- 3:00 p.m. Partner Resource Room Opens [Trianon B]
- 5:00 - 6:30 p.m. Welcome Cocktails and Introduction of New Partners (Partners Only) [Promenade]
- 6:30 - 8:30 p.m. Dinner with New York City Mayor Bill de Blasio (Partners Only) [Ballroom]
- 8:30 - 11:00 p.m. Partner Wine Party (Partners Only) [Presidential Suite Room #2510]

MONDAY, APRIL 28

- 8:00 a.m. Registration & Information Desk Opens and "Unconference" Sign-Ups Continue [Promenade]
- 8:00 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 8:00 a.m. Breakfast Buffet Opens (Partners Only) [Ballroom]
- 8:30 - 11:00 a.m. DA Partner Forum & Business Session: Looking Ahead to the DA's Next Five Years (Partners Only) [Ballroom]
- 11:00 - 11:30 a.m. Break
- 11:30 a.m. Lunch Buffet Opens [Ballroom]
- 11:45 a.m. - 12:15 p.m. Opening Remarks by DA Board Chair Rob McKay [Ballroom]
- 12:15 - 1:45 p.m. How Social Movements Fuel Policy Wins: Lessons from Criminal Justice Reform [Ballroom]
- 1:45 - 2:00 p.m. Big Ideas: Economic Solutions for the 21st Century [Ballroom]
- 2:30 - 3:30 p.m. Afternoon Workshops: Advancing a Progressive Policy Agenda
Global Climate Change [Salon]
Immigration Reform [Trianon A]
Gun Violence Prevention [Glass Room]
Money-in-Politics Reform [Versailles]
- 4:00 - 5:00 p.m. "Un-Conference" Partner Organizing Time [Various]
- 5:00 - 6:00 p.m. Cocktail Reception [Promenade]
- 6:00 - 7:30 p.m. Intentions Session (Partners Only) [Concorde]
- 6:00 - 7:30 p.m. Meeting for Leaders of Aligned Network & Dynamic Investment Organizations (APOs Only) [Salon]
- 7:30 - 9:00 p.m. Dinner & Program: Remarks by Valerie Jarrett and Performance by Lizz Winstead [Ballroom]
- 9:00 - 11:00 p.m. Film Screening & Discussion: *Freedom Summer* [Salon]

CONFERENCE OVERVIEW (CONTINUED)

TUESDAY, APRIL 29

- 7:30 a.m. Registration & Information Desk Opens [Promenade]
- 7:30 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 7:30 a.m. Breakfast Buffet Opens [Ballroom and Terrace]
- 7:45 - 8:30 a.m. Partner-Organized Meet-and-Greet with U.S. Senate Candidate Ailson Lundergan Grimes [Salon]
Hosted by Marcy Carsey, David desJardins, Paul Egerman, Fran Rodgers, John Stocks, and Michael Vachon
- 8:30 - 9:30 a.m. Partner-Organized Caucus Meetings
- Putting Climate Change at the Forefront of American Politics [Versailles]
Hosted by Tom Steyer
 - Fighting Economic Inequality: A Bold Plan to End Poverty [Glass]
Hosted by Susan Sandler and Steve Phillips; Quinn Delaney; Jim and Suzanne Gollin; Mary Kay Henry, SEIU; Joanie Bronfman; Weston Milliken; and Kate and Phil Villers
- 10:00 - 10:15 a.m. Big Ideas: Economic Solutions for the 21st Century [Ballroom]
- 10:15 - 11:30 a.m. Cities: Laboratories of Progressive Innovation? [Ballroom]
- 11:45 a.m. - 12:30 p.m. Big Ideas Economic Solutions for the 21st Century Group Discussion [Versailles]
- 12:30 - 2:30 p.m. National Funders Convening Lunch: 2014 and Beyond - An Election Preview [Ballroom]
- 3:00 - 4:00 p.m. National Funders Convening Workshops
- Protecting Access to the Polls [Glass]
 - Winning Strategies on Healthcare in the States [Versailles]
- 4:30 - 5:30 p.m. National Funders Convening Workshops
- Maintaining and Enhancing Progressive's Technical Edge [Versailles]
 - Ballot Initiatives in 2014 and Beyond [Glass]
- 5:30 - 7:45 p.m. Cocktail Reception: State Battles, State Victories - How to Win in 2014 (Funders Only) [Concorde]
- 7:45 - 9:00 p.m. Dinner with David Axelrod - Reflections on a Career in Journalism, Politics, and the Obama Journey [Ballroom]
- 9:00 - 11:30 p.m. Late-Night Networking [Lobby Bar]

WEDNESDAY, APRIL 30

- 8:00 a.m. Registration and Information Desk Opens [Promenade]
- 8:00 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 9:00 - 9:30 a.m. Opening Remarks by Planned Parenthood Action Fund President Cecile Richards [Ballroom]
- 9:30 - 11:00 a.m. Breakfast Discussion: Spotlight on Engaging the New Majority [Ballroom]
- 11:30 a.m. - 12:30 p.m. Partner-Organized Caucus Meetings
- Scholars Strategy Network [Glass]
Hosted by David desJardins and Bob Bowditch
 - No Shortcuts: Building Power for the Long Haul [Versailles]
Hosted by Michael Vachon and Ken Zimmerman
- 1:00 - 3:00 p.m. Optional Activity: Organizing for Action Open House (Shuttle departs from Lower Lobby at 1:00 p.m.) [Off-site]

A NEW PROGRESSIVE ERA?

DEMOCRACY ALLIANCE SPRING 2014 INVESTMENT CONFERENCE

PRIVATE AND CONFIDENTIAL TO DEMOCRACY ALLIANCE

SUNDAY, APRIL 27

SUNDAY AT-A-GLANCE

10:15 a.m. - 12:00 p.m.	Optional: Private Tour of the Art Institute of Chicago [Off-Site]
3:00 p.m.	Registration & Information Desk Opens and "Unconference" Sign-Ups Begin [Promenade]
3:00 p.m.	Partner Resource Room Opens [Trianon B]
5:00 - 6:30 p.m.	Welcome Cocktails and Introduction of New Partners (Partners Only) [Promenade]
6:30 - 8:30 p.m.	Dinner with New York Mayor Bill de Blasio (Partners Only) [Ballroom]
8:30 - 11:00 p.m.	Partner Wine Party (Partners Only) [Presidential Suite, Room #2510]

SUNDAY DETAILS

- 10:15 a.m. - 12:00 p.m.** **Optional Activity: Private Tour of the Art Institute of Chicago**
Partners arriving early are invited to a curator-led tour of the renowned Art Institute of Chicago, home of more than 300,000 works of art including Grant Wood's *American Gothic*, Jackson Pollock's *Greyed Rainbow*, and Georges Seurat's *A Sunday on La Grande Jatte*. A shuttle will depart from the lower lobby at 10:15 a.m.; the tour will begin at 10:30 a.m.
- 3:00 p.m.** **Conference Registration & Information Desk Opens [Promenade]**
- 3:00 p.m.** **Partner Resource Room Opens [Trianon B]**
- 3:00 p.m.** **"Unconference" Sign-Ups Begin [Promenade]**
Democracy Alliance conferences are unique opportunities for Partners to self-organize around topics of shared interest. This conference features the DA's first-ever "Unconference," an opportunity for Partners to host impromptu discussions on a variety of topics. To sign up to host your own "unconference" discussion, visit the Registration & Information Desk.
- 5:00 - 6:30 p.m.** **Welcome Cocktails (Partners Only) [Ballroom]**
Partners are invited to join Board Chair Rob McKay and Membership Committee Chair Jim Gollin for a special reception welcoming new Partners.



SUNDAY, APRIL 27 (CONTINUED)

6:30 - 8:30 p.m.

Dinner with New York Mayor Bill de Blasio (Partners Only) [Ballroom]



Katrina vanden Heuvel

DINNER WITH NEW YORK MAYOR BILL DE BLASIO

Over dinner, *The Nation* Editor and Publisher Katrina vanden Heuvel will lead a wide-ranging discussion with New York City Mayor Bill de Blasio about lessons we can learn from New York's path to social and economic equality.



Bill de Blasio

8:30 p.m. - 11:30 p.m.

Partner Wine Party (Partners Only) [Presidential Suite, Room #2510]

Hosted by Rob McKay, David Friedman, and Joe Zimlich

Join fellow DA Partners for a glass of wine and late-night snacks, including vino from wineries owned by DA partners in the Ritz-Carlton's presidential suite, offering stunning views of the Chicago skyline.



A NEW PROGRESSIVE ERA?

DEMOCRACY ALLIANCE SPRING 2014 INVESTMENT CONFERENCE

PRIVATE AND CONFIDENTIAL TO DEMOCRACY ALLIANCE

TUESDAY, APRIL 29

TUESDAY AT-A-GLANCE

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7:30 a.m.	Breakfast Buffet Opens [Ballroom and Terrace]
7:45 - 8:30 a.m.	Partner Organized Meet-and-Greet with U.S. Senate Candidate Alison Lundergan Grimes <i>Hosted by Marcy Carsey, David desJardins, Paul Eggerman, Fran Rodgers, John Stocks, and Michael Vachon</i>
8:30 - 9:30 a.m.	Partner-Organized Caucus Meetings
10:00 - 10:15 a.m.	Big Ideas: Economic Solutions for the 21st Century [Ballroom]
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9:00 - 11:30 p.m.	Late-Night Networking [Lobby Bar]

TUESDAY DETAILS

7:30 a.m.	Registration and Information Desk Opens [Promenade]
7:30 a.m.	Partner Resource Room Opens [Trilanon B]
7:30 a.m.	Breakfast Buffets Opens Partners are invited to enjoy their breakfast in the ballroom or in one of two Partner-Organized Caucus Meetings. Breakfast buffets are located in the ballroom and outside the caucus meeting rooms.
7:45 - 8:30 a.m.	Partner Organized Meet-and-Greet with U.S. Senate Candidate Alison Lundergan Grimes [Salon] <i>Hosted by Marcy Carsey, David desJardins, Paul Eggerman, Fran Rodgers, John Stocks, and Michael Vachon</i>

MEMORANDUM

TO: Democracy Alliance Board
FROM: Gara LaMarche
RE: Partner forum on April 28 and strategy review process
DATE: April 24, 2014

We'll have some time at our April 27 board meeting to preview and prepare for the partner forum the next day which Rob and I will kick off and at which I'll lay out some thoughts about the DA's future, based on the discussion we had at our recent board retreat.

A good deal of the partner forum will be spent in small group discussions (with a short report-back to the larger group). In addition to the strategic conversation, we'll also have detailed budget information available (with Paul Egeman available to answer questions any partners have while we are in Chicago) and we'll describe the consultative process we are undertaking toward the adoption of a new investment strategy in the fall, involving a committee, an advisory group, a staff working team, and a series of regional partner forums over the spring and summer.

I'm enclosing some of the materials we would like to hand out at the partner forum. We'll need to finalize the committees at the board meeting. I am enclosing the text that I will use at the partner forum, along with the slides that go with it. If you have any comments or suggestions that will make the presentation stronger or clearer, I'd welcome them in the next few days.

Look forward to seeing you in a few days!

enclosures

A 2020 Vision for the Democracy Alliance

The Democracy Alliance (DA) has seen considerable success in its original vision for strengthening the progressive infrastructure in the United States, yet we are far short of where we need to be. As we approach the tenth anniversary of the DA's founding, it is time to take a fresh look at the challenges we face, the capacities that remain to be built or need further strengthening or alignment, with a wider frame of vision, a longer time horizon and a more ambitious plan to assemble resources for the progressive movement. We are calling this the DA's 2020 Vision Project.

The 2020 Vision Committee is charged with recommending to the DA Board, after broad consultation with the full Partnership and leaders in the progressive community, a strategic vision and investment plan for the DA through 2020. Its members are Patricia Bauman, Farhad Ebrahimi, Paul Egerman, John Stocks and Kathleen Welch.

A group of advisors will assist the committee, Board and staff leadership in assuring that a wide range of views and expertise informs the 2020 process. The advisors are: Paul Booth, Anna Burger, Raj Goyle, Anna Lefer Kuhn, Maya Harris, Susan McCue, Eli Pariser, Manuel Pastor and Urvashi Vaid.

A staff working group will manage the process and develop detailed plans. Its members are Julie Kohler, Gara LaMarche, Eddy Morales, Ngozi Nezianya, Frank Smith and Katherine Storch. Tracy Sturdivant will serve as a consultant.

The 2020 Vision process will begin with a Partner-only forum at the April DA conference. There, Gara LaMarche and the Board will present some initial suggestions on the next phase of the DA's strategy, and Partners will provide initial feedback on scope and direction. As Partners will hear at the conference, one of the framing ideas that will be presented for discussion is how the DA can begin to evolve its investment strategy from one that focuses on organizations and embrace a movement perspective. Doing so would focus less attention on the specific organizations that are recommended for funding and more on "baskets" of work that, if achieved, could be instrumental in strengthening our democracy and creating the conditions for widespread progressive change. Each basket would have clearly defined measures of success, benchmarks, and funding strategies likely involving multiple organizations (existing, as well as potentially new organizations) within the progressive infrastructure.

The process will continue through the spring and summer with a series of regional consultations with Partners and movement leaders, most likely in the San Francisco Bay area, Texas, Colorado, Massachusetts, New York and Washington, D.C. Committee members and advisors will take part in at least one of these regional meetings and hold several meetings of their own. Some original research papers may be commissioned, but as much as possible we will draw on the existing work of

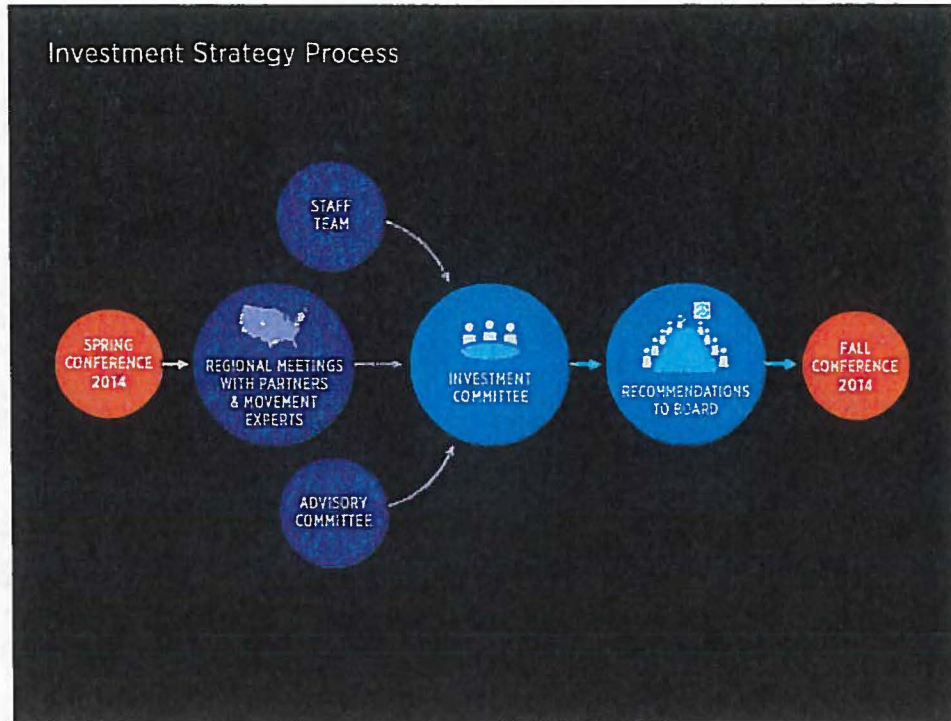
organizations in the DA community. We will also conduct landscape funding scans, analyzing current and past investment patterns within the DA and among key allied funders, who we would want and need to leverage in order to raise the level of resources necessary to affect large-scale change. It is likely that several special meetings or forums will be held to take a deeper look at some areas that may be emphasized, such as work in the states, challenges to democracy, or the power of the Rising American Electorate, and we would ask Partners to grapple with how best to address key overriding issues around leadership development, innovation, scale, and sustainability, all of which are key to achieving a vibrant and robust infrastructure.

A 2020 Vision plan will be presented to the DA Board in the early fall, and then refined between then and the November 12-14 DA conference in Washington, DC, where it will be presented to the full Partnership.



I'm very glad we have these few hours together, before the DA conference widens to include other participants, for partners to talk, with only Julie Kohler and me from staff, about the current state of the Democracy Alliance and the challenges and opportunities for its future.

I've been on the job here for five months. During that period, and particularly in the last few months, I've been traveling all over the country to meet and talk with those who have a stake in the strength and vitality of the Democracy Alliance.



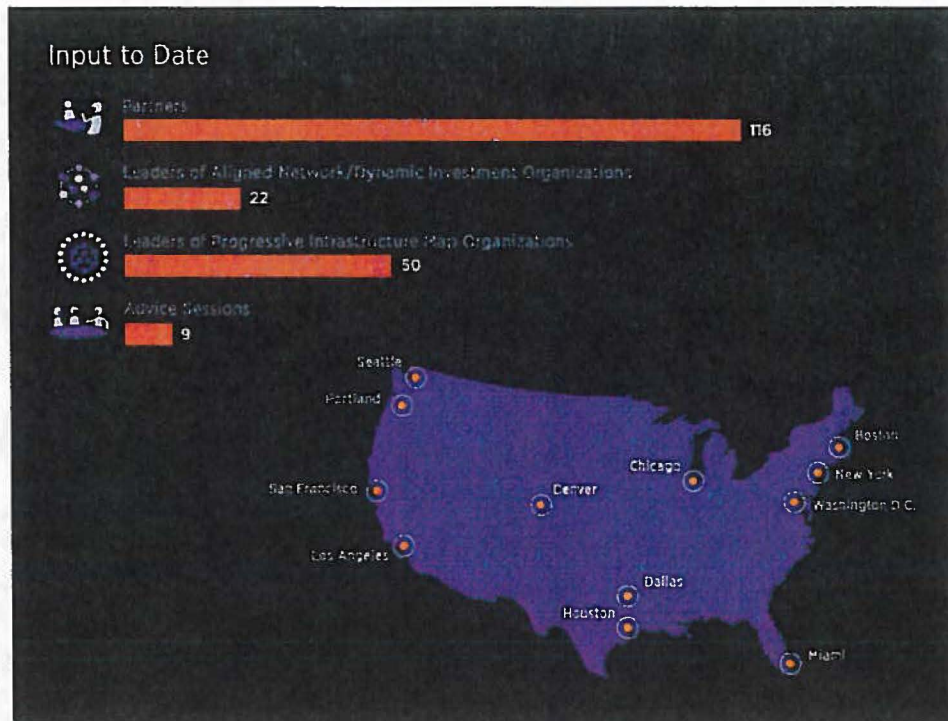
We want to start today with small group discussions about the future of the DA. Is there agreement with the basic premises I have set forth about where the DA has been successful, and where we still fall short? Do partners support the idea of organizing our work around a small number of key focus areas? Democracy and inequality, states and the rising electorate – are these the right ones? What might be missing from the list, and how might these areas be deepened and refined?

That conversation begins today, but will continue through the spring and summer in a series of regional forums for partners and movement leaders, so everyone gets a chance to participate in the discussion and planning, and not just once, but as the conversation proceeds.

This process will be overseen by a small board/partner committee, aided by a slightly larger advisory committee of movement leaders with greater expertise and diversity that the process demands, and managed by a small staff working group.

By the time the partners meet in the fall, the board will have taken all this into consideration and we will have a plan to take the DA to 2020 that we'll review and discuss in this kind of forum when we meet in Washington.

This doesn't cover every thing the DA should do – for instance, making better use of partners as advocates, as many you did with Voices for Progress on the filibuster use last fall, or enhancing the DA's convening capacity or its work to help the organizations in our movement diversify their



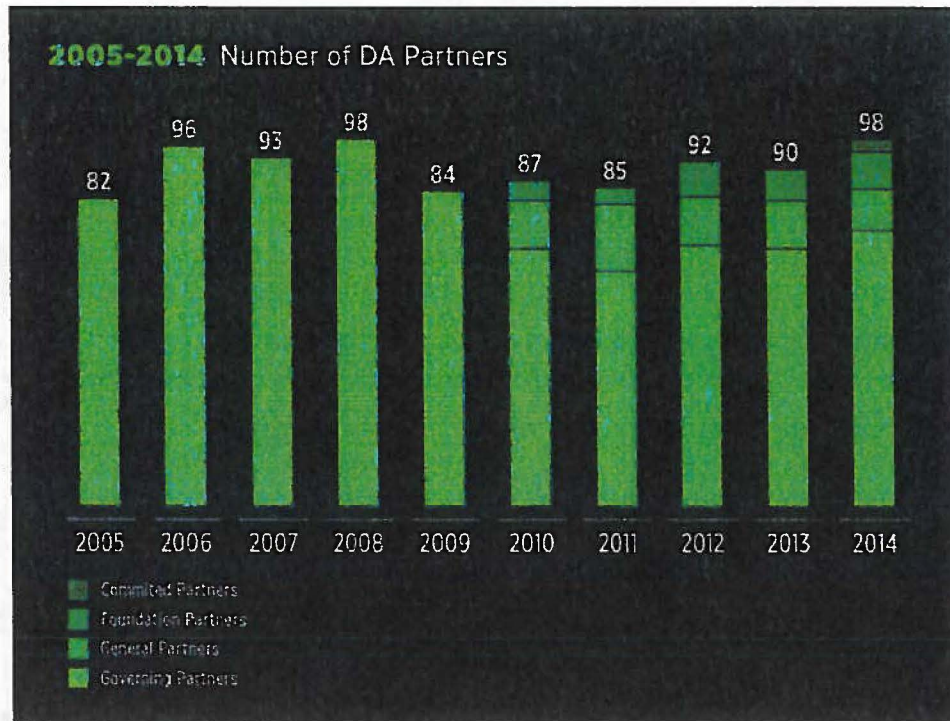
I've met with 116 partners and partner representatives, and the few I haven't talked with it's not for want of trying! I've talked with a dozen or so former partners, too.

I've met with all 22 of the progressive movement organizations in what we call the Aligned Network and Dynamic Investments.

I've met with another 50 groups on our larger "progressive infrastructure map."

We've held daylong retreats of the board and the staff.

I've held nine informal advice meetings with groups of progressive leaders from Washington, DC to Portland, Oregon, from labor to women to political operatives.

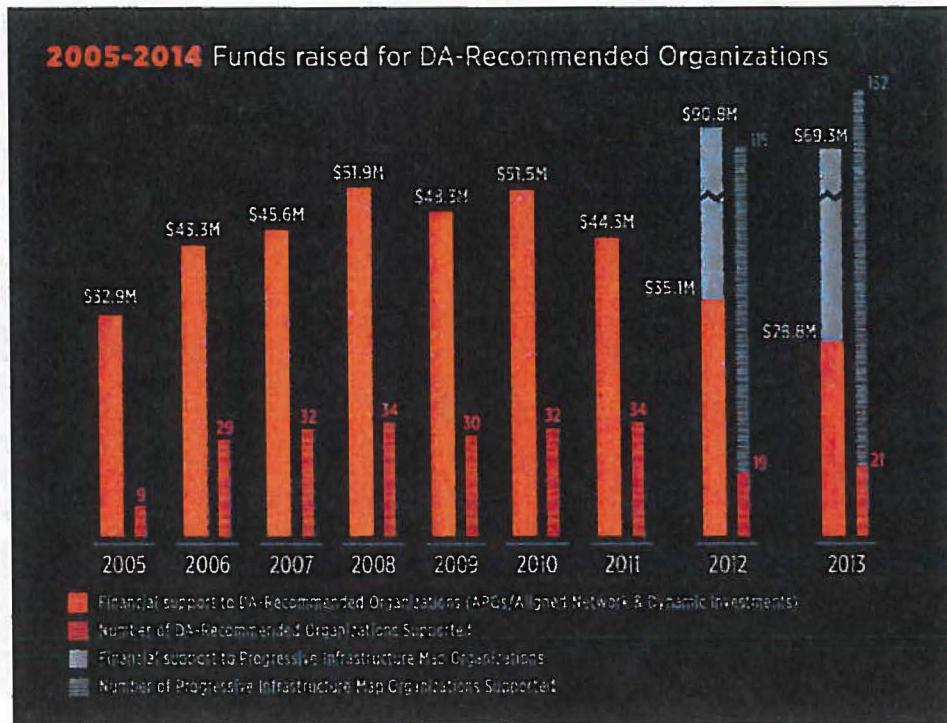


I've worked closely with the board's membership committee and a very hardworking staff to recruit new partners to the Democracy Alliance, and I'm pleased to say we have added eleven since the beginning of this year, **10** of whom are with us here today. This matches our all-time membership high from 2008 and we are on track to top 100 partners, for the first time ever, very soon.

All the conversations I've had – with partners and ex-partners, movement leaders and staff, political figures and prospects – have been invaluable to me in forming a picture of what the DA means to people, what it has done well, and where it needs to do better.

I want to talk a bit about what I learned, and then begin a conversation about where the DA should go in its second decade, which begins next year.

The single biggest takeaway from my talks with partners is how deeply they value the community that has been built – a community based on values, where individuals of wealth come together with labor leaders representing the voices and dollars of working people, where donors mix with progressive movement activists, building relationships that advance the progressive movement well beyond our semi-annual conferences.



An even more important metric is that the dollars we are raising haven't grown enough, and a number of policy decisions we've made – for example, allowing contributions to any group on the Progressive Infrastructure Map, now grown to 180 organizations, to count toward a partner's DA commitment – have made it harder to marshal the money we pledge to raise for the much smaller number of groups in the DA's Aligned Network.

Many partners have told me that for the first few years of the DA's existence, they knew what our strategic focus was, but in recent years they are less sure of that. They know we vet the groups we support well, but what unites the 22 groups on our preferred list – as opposed to some other 20 groups – is less clear to people, inside the partnership and out. At times it has seemed that the DA is more about the list, and who makes the cut, than the larger goals that a list is meant to represent.

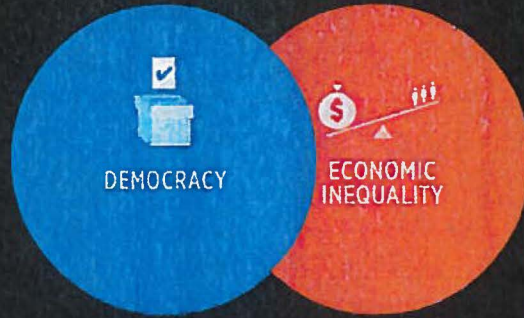
That leads me to the second part of my remarks, which is about what the Democracy Alliance might do in its next decade to refresh and advance the progressive vision that animates us all.

I've thought about this a lot, as someone who has spent almost forty years as a progressive advocate and funder. In what the DA needs to do in the coming years, I think we have to lift our sights from an organization-focused lens to a movement-

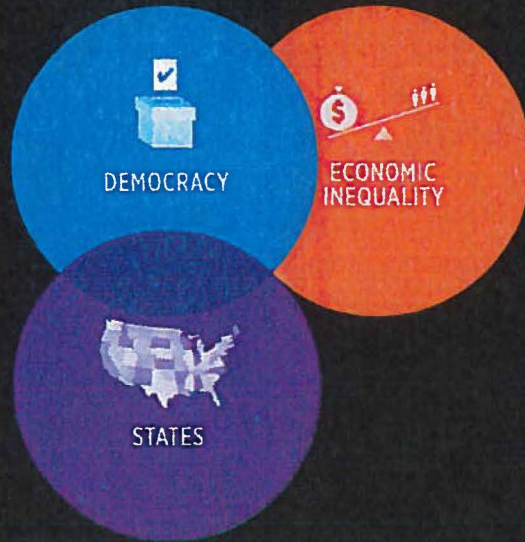
Pillars of a DA Strategy



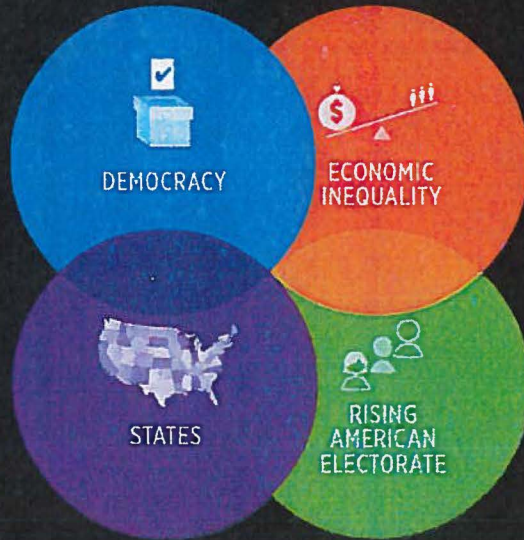
Pillars of a DA Strategy



Pillars of a DA Strategy



Pillars of a DA Strategy



DEMOCRACY

- ➔ Restoring and expanding voting rights
- ➔ Reducing the influence of money in politics
- ➔ Assuring fair redistricting and representation in 2020
- ➔ Protecting the courts



The first area centers on the infrastructure of our democracy – the rules of the game, if you like. The right has been extremely effective in manipulating those to perpetuate its power and preserve an advantage that is often at odds with its actual voting strength.

What we would emphasize here starts with voting rights – both the steady dilution of minority voting strength as a result of the court's chipping away of the Voting Rights Act and the suppression of the vote through Republican schemes to install voter i.d. requirements and roll back practices to modernize and expand participation like same-day registration and early voting.

It continues with a serious effort to prepare for the redistricting that will follow the 2020 elections, so that the state legislatures and congressional districts that emerge from it fairly reflect our voting strength. The impact of the Tea Party's gains in 2010, and the distortion in district lines that followed it, can't be overstated – among other things, it is why it is a struggle to take back the House of Representatives despite the fact that Democrats polled more votes for House members than Republicans in 2012.

In repairing the infrastructure of our democracy, we also have to focus heavily on the role of money in politics, a movement that has been re-energized by the Citizens United, and more recently, the McCutcheon decisions. Increasingly, elections in the

ECONOMIC INEQUALITY

- ➔ Increasing wages for low-income workers
- ➔ Restoring the social safety net
- ➔ New thinking about a fair economy



If the first area of emphasis, underlying every other issue we care about, is the structure of our democracy, then the second, and closely related, is the structure of our economy, because the voices and votes of the wealthy and corporate interests are drowning out the voices and votes of most citizens.

The growing inequality of wealth and income has risen, for most of us, to the top of the national agenda. In talking with partners, I sense that there is more concern and consensus about this as a priority than any other single issue, and no issue is more threatening to the stability of the democracy or to the lives of millions of working people and their families.

There is considerable momentum and movement on this, from the minimum wage campaigns in Seattle and other cities and states, to campaigns for other benefits for working Americans like paid sick leave and health care enrollment, to the resonance of candidates like Bill de Blasio and Elizabeth Warren. There is considerable evidence that progressive messages on these issues are breaking through and that the public shares our concern about income and wealth disparities and their particularly profound impact on people of color and women. Yet our policy agenda on this most critical of issues is a little thin, and the capacity of leading groups in our movement needs serious and sustained investment.

STATES

- Strengthening and expanding state infrastructure
- Building for the long term in the south and west
- Advancing progressive policies in blue states
- Countering ALEC with a network of progressive lawmakers



When the DA was started nine years ago, states and cities were barely on our radar screen. In the years since, that picture has changed dramatically. Not just because of dysfunction and stalemate at the federal level, which seems unlikely to change for at least the next few years, but because what happens in states matters, a lot. When Tea Party candidates prevail in statehouse races, women's rights suffer, protections for working Americans are gutted, voting rights are constricted, the social safety net is slashed, and conservative victors make sure they consolidate their power through redistricting, judicial appointments, and attacks on key sources of progressive power like labor and Planned Parenthood.

I don't need to make that case to the people in this room, who include visionaries who turned around Colorado and Minnesota, and are working to build enduring progressive power in Florida, Texas, North Carolina, Maine and other states. The Committee on States, in which many partners participate, has been an important leader in these efforts. But we need to raise resources which are commensurate with the task ahead in the states, and we need to expand the model to additional states – indeed, the majority of states. Traditional battleground states remain crucial, but demographics and other trends give us openings in much of the south and west, and a long game should be investing there, too. Not to mention that we can make real progressive gains for people in traditionally blue states like California and New York where we have many of the reins of power.

RISING AMERICAN ELECTORATE

- Integrating engagement funds to work better together
- Including constituencies like Asian-Americans & working class whites
- Linking electoral strength to policy wins

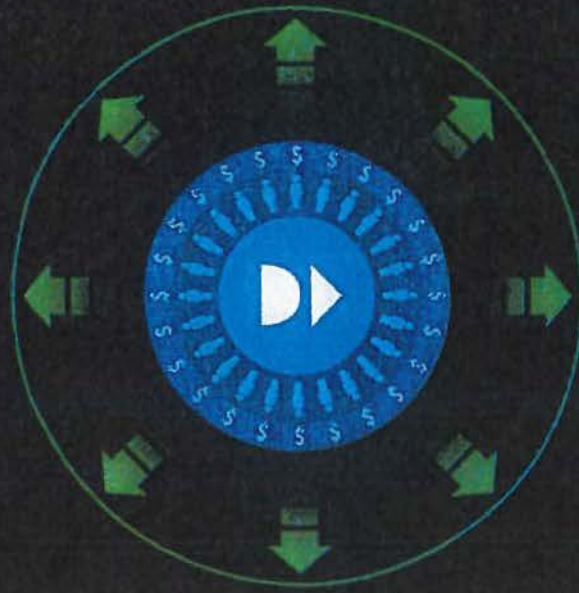


Finally, as to people. Another relatively recent development in the DA is the growth of engagement funds focusing on key elements of what are often called the Rising American Electorate – Latinos, African-Americans, young people and women. These are essential to expanding and preserving progressive power. One of the things that makes these efforts strong and distinctive is that, as with the state donor tables, those who have invested in the engagement funds that the DA has been instrumental in helping to establish and support work together to make the allocation decisions, so it democratizes involvement and decision-making.

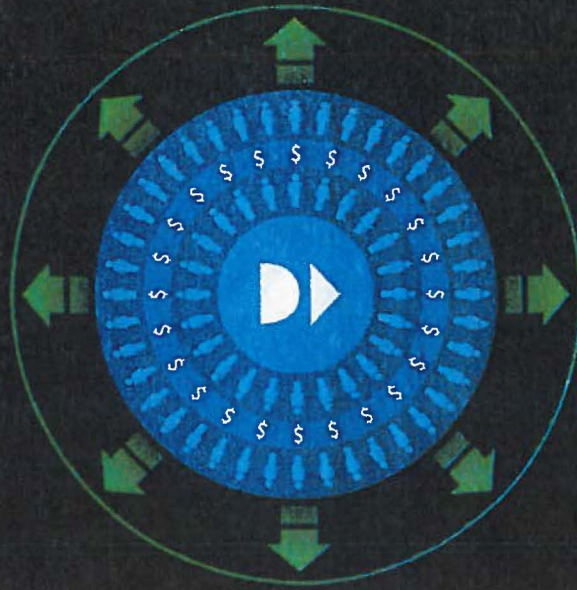
I have talked with a lot of people about these funds, and while we need to build on their strengths, we also need to integrate them more closely so they are not standing in silos, nor are they the only way the DA reflects the centrality of race and gender – or the leadership of young people – in our work. We need to find better ways to expand our lens, so that we no longer leave out important constituencies like Asian Americans and the white working class. And we must elevate the role of key constituencies in our funding not because women, people of color and young people will tactically help win elections – though there is no effective path to progressive power without them – but because the progressive agenda is inextricably linked to the strength and health of these communities.

These, then, are the four pillars that I believe should support the DA's strategies in

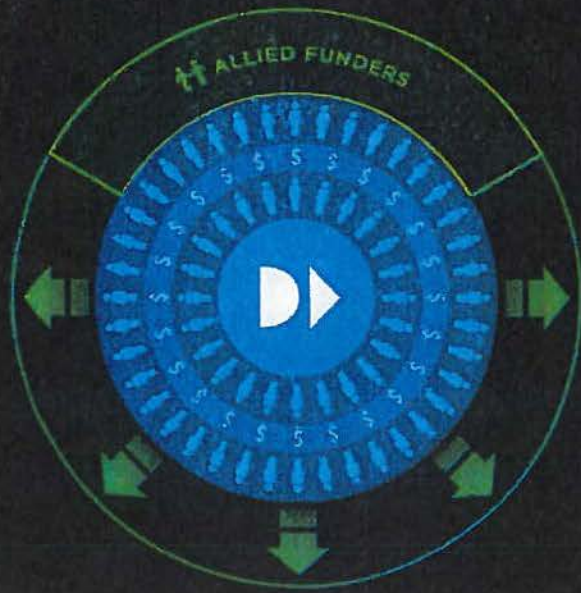
Raising Our Sights



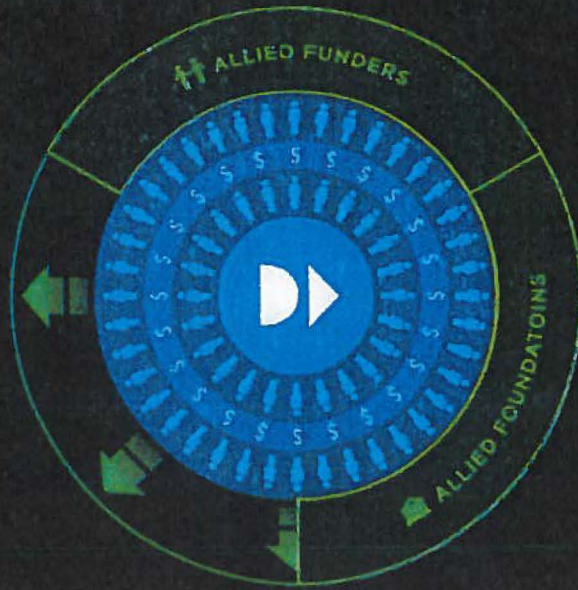
Raising Our Sights



Raising Our Sights



Raising Our Sights



Raising Our Sights



We've made an enormous contribution to that, but we can do so much more. In widening our frame, I think we also need to lift our sights from the \$25-30 million we raise for the aligned network, past the \$50-60 million we raise for the larger progressive infrastructure map, to the hundreds of millions of dollars that will be necessary to make a serious effort to repair our democratic infrastructure, build broad and deep capacity in the states, and mobilize the voting constituencies that are the backbone of our political strength and of our ability to hold leaders accountable for progressive government.

That starts with the partnership, with the people in this room, and I hope we can build a vision that is compelling enough to encourage those of you who can give more to do so. That partnership needs to expand, and our early success this year encourages me to think we can grow significantly, if every partner resolves to work with the board, the staff and the membership committee to recruit others.

But to raise the funds we need to raise, we also need to think differently about how we go about it. We need to build on a larger, even more committed partnership to approach other progressive donors who, for whatever reason of capacity or focus may not join the DA. We need to work more closely with progressive foundations and other institutions. And we need to leverage the contributions of small donors

MEMORANDUM

TO: DA Board of Directors
FROM: Jenna Narayanan and Ryan Rodriguez, Vice Presidents of Partner Services
RE: Membership Information
DATE: April 24, 2014

The purpose of this memo is to provide an update on Partner retention, recruitment, and engagement efforts.

Partner Retention

As of April 26th, the Democracy Alliance (DA) has 86 Partners and 10 foundation subscribers (plus three Partners who have committed to join but not yet paid). The following is summary of membership renewals to-date, and update on Partners we believe could be at-risk for dropping and a description of on-going/future engagement opportunities (for a summary of DA by the Numbers, please see Appendix A).

We have the following retention goals;

- Retain 90% of current Partnership
- Develop deeper connections between and among current Partners
- Convert as many of our General Partners as possible to Governing Partners

Retention:

Retention efforts are on pace based on historical practice. By the end of March, 81% of Partners on the January dues cycle had renewed their membership. In total, we have received dues payments totaling \$1.45M (\$90,000 in new Partner dues – the remaining new Partners paid in April, so their dues are not reflected yet in our financial statements – \$1.28M in retention dues/subscription fees, and an additional \$45,000 in late-2013 dues). Partners on the January dues cycle who have not yet remitted payment have been reminded to do so at the spring conference. The remaining Partners will be invoiced in July, eliminating the October dues cycle, altogether. Partners on the October dues cycle will be notified of this change immediately following the spring conference.

Attrition:

As of April 26, two partner units have officially been dropped from the DA roster (Ron Feldman and Bill Budinger). While Ron remains a supporter of the DA, he has not actively engaged in DA activities in several years. Bill had taken a two year hiatus to focus on his funding in the education space, and has decided continue that refined focus in the future, though he remains a supporter of the DA. Although we are dropping Ron and Bill from our official numbers, we are in regular communication with them and feel confident that we can reengage them around our 2014 programming.

One additional Partner unit has indicated that they are unlikely to renew their membership in 2014 (Chris Hughes and Sean Eldridge), but until we are able to schedule an in-person meeting with them to learn more about their plans (they have indicated that they would like to return to the DA at a later date), we have not officially dropped them from the DA roster.

At Risk:

One additional Partner who has been on hiatus are at risk of not renewing and is being treated as a prospect through the spring conference (Phil Murphy). Two additional Partners are considered at-risk: Steve Cohen and Tim Gill,

Conversion:

We are actively encouraging our General Partners to convert their membership to the Governing Partner level. Top prospects for this conversion are Fran and Charles Rodgers. Scott and Christy Wallace, while

living in South Africa, have decided to upgrade their participation from the General Partnership level to that of a foundation subscriber (through the Wallace Global Fund, which is run by Ellen Dorsey, a regular participant in DA meetings. Allison Barlow, a long-term Wallace advisor, will also be attending the conference on behalf of WGF). Scott and Christie have indicated a desire to return to full Governing Partner status upon their full-time return to the U.S.

Recruitment

Our 2014 Recruitment goals are as follows:

- Recruit 16 new Partners by December, 2014.
- Strengthen membership committee by actively enlisting new Partners/donor leaders to assist with recruitment efforts in their networks
- Develop a pipeline of Partner driven contact to the DA's 50 top prospects

We enter the year in a very strong position for recruitment, and are on track to exceed our goal of 16 new Partners in 2014. We have eight new Partners/foundation subscribers so far this year (Adam Abram, Amalgamated Bank, New World Foundation, Phil Munger, Rick Segal, Ryan Smith, Henry van Ameringen and Dirk Wiggins). In addition, we have three additional committed Partners who have been invoiced (Foundation subscribers: Rockefeller Family Fund and Arcus Foundation; General Partner: Jeanne Findlater).

We head into the conference with 18 confirmed prospects attending the conference as a sneak peek or as part of the National Funders Convening (NFC), and five additional prospects that could potentially be in attendance. Prospective partners confirmed to attend the whole conference are: Lara Berghold representing Norman Lear and Rob Reiner, Joan Davidson, Joel Falk, Anna Fink of the Wyss Foundation, Anna Lefer Kuhn of the Arca Foundation, Dave Horwich representing Fred Eychaner, Alan and Andrea Solow, Katrina vanden Heuvel. Prospective Partners confirmed to attend the NFC are Christian Ettinger, Daniel Hildreth, Mahsa Pelosky, Rob Glovsky, Nikki Budzinski of UFCW, Kevin Conlon, John Atkinson, Paul Fairchild, and Susan Jacobson (full list with bios included).

In addition to a growing list of cultivated prospects, DA staff and leadership are focused on the following prospects for membership in the coming months: Lorna Brett Howard, Jabe Blumenthal (a former Partner who indicated that he is open to considering returning), Linda Shoemaker (another former Partner), Glaser Progress, Champion Advocacy Fund, Michael Kieschnick (former Partner), Helen Gemmill, Matt Palevsky (former Partner), Deb Sagner (former Partner), Rep. Jared Polis (former Partner), and Deb Matwijkow and her father, Joseph Anderson.

Finally, the Membership Committee is looking to expand its ranks and will be actively recruiting new members as part of an increased focus on membership. This year staff will work closely with the Committee to identify strategies for creating a culture within the Partnership that values and prioritizes recruitment. Raising awareness of the need to bring in new members and inculcating shared responsibility for growing the DA is critical to the success of our recruitment program.

Legacy Program

Our 2014 Legacy Program goals are to:

- Raise at least \$1.5 million in Legacy revenue
- Retain 90% of \$50,000-\$100,000 Legacy Partners
- Recruit two new \$50,000-\$250,000 Legacy Partners

By April 1, we received \$785,000 in Legacy contributions. An additional \$50,000 2013 Legacy contribution that arrived at the very end of the year was deposited in 2014. We are in the process of collecting our remaining expected commitments and setting up meetings at the conference with potential Legacy Partners in order to secure all commitments in the first half of the year.

Marshaling

Our 2014 marshaling goals are as follows:

- Raise \$25 million for the Aligned Network/Dynamic Investments
- Raise \$10 million in advance of the Spring Investment Conference

To date, 53% of Partners have made intentions or submitted contributions for 2014. More than \$17 million in funds have been committed to Aligned Network and Dynamic Investment organizations. Staff is in the process of targeted Partner outreach and expects to have more than 60% of Partner intentions in advance of the Spring Investment Conference, and is confident we will reach our goal of reaching \$21 million in the intentions session.

Partner Engagement

Our 2014 engagement goals are as follows:

- 90% of Partner Units participate in at least one engagement activity
- 80% of Partner Units attend at least one DA conference
- 80% of post-conference survey respondents rate the conference as "good" or better

To date, nearly 25% of Partner Units have participated in at least one engagement activity in 2014 – and that is before factoring in spring conference registration, which was higher than originally anticipated and slightly above average for DA spring conferences. We are currently drafting a proposal for content around which to engage the Partnership in the months following the spring conference.

Spring 2014 Investment Conference, Chicago, IL

DA staff is hard at work putting the final touches on will be exciting few days in Chicago befitting both the urgency of our current political moment and the importance this moment will have in the DA's own evolution. As you will see from the final agenda (attached), we have attempted to be responsive to the interests that Gara heard from Partners in the 116 meetings that he has held over the last several months. As the agenda lays out, the spring conference reflects several themes that emerged from this feedback, including:

- *Additional time reserved for Partners-only and Partner-organized content.* In fact, the entire first day is reserved for Partners-only activities. Partner-organized content is featured prominently on every day of the agenda.
- *Learn from our successes and incorporate new content.* The agenda features two sessions that offer Partners the opportunity to learn lessons from recent progressive victories in the fields of criminal justice reform and in city halls across the country;
- *Feature newer, more diverse voices in conference discussions.* This agenda includes opportunities for keynote remarks on innovative ways to lift up those around us struggling, and additional younger voices new to the national stage.
- *Ensure the DA is responsive to the political challenges and opportunities we face.* Although the DA was created to take the long-view approach to building progressive power through support of non-party progressive infrastructure, the conference will also include ample time for Partners to learn more about the challenges we face this November and beyond key opportunities such as persuading and mobilizing the Rising American Electorate on Election Day and strategic investment in the states.
- *Strengthen the Partnership through strong growth and deepen existing relationships through activities that break the mold from what we have done in the past.* This agenda features not only as behind the scenes tour of one of our nation's most treasured art institutes. But also VIP tickets to two of our movements funniest comedic voices—Stephanie Miller and Lizz Winstead.
- *Ensure that the conferences are a success for the groups we say are central to our ability retake our future from the radical Right.* This conference will feature a return of the Intentions Session

and through strong strategic pre-conference marshaling, we are in a good trajectory for an inspiring session and inspiring support of the groups.

Fall 2014 Investment Conference, Washington, DC

Our fall 2014 investment conference is scheduled for November 12 - 15 at the Mandarin Oriental Hotel in Washington, DC. This conference will take place only a week after the 2014 midterm elections so we expect to spend some portion of our time together exploring what just happened and what it means for the future of a progressive agenda.

Partner Summit – Climate Change

The DA is actively considering co-hosting a Partner Summit in early fall (likely in September in conjunction with the opening of the U.N. General Assembly) in New York City on climate change. Similar to the successful summit we co-hosted with Fund for the Republic in 2013 on money-in-politics reform, this summit would provide the DA with an opportunity to engage our Partners as well as reach a sizeable universe of donors who are not currently members of the DA community around an important issue that both they and we care deeply. We are working closely with Tom Steyer, the Wallaces, Bill Roberts and Kathleen Welch from Corridor Partners, and other DA Partners with a particular interest in the subject matter as we move forward with planning.

Appendix A

DA by the Numbers

	2009	2010	2011	2012	2013	2014
New Partners	6	15	8	19	10	7*
<i>Governing Partners</i>	6	5	6	13	9	6
<i>General Partners</i>		9	1	0	0	0
<i>Foundation Units</i>		1	1	6	1	1
Partner Attrition	24	11	10	12	12	2**
Dropped from Governing to General		9	4	1	1	0
Increased from General to Governing				2	0	1
Moved from General to Foundation Subscriber						1
Total Partner Units	83	87	85	92	90	96
<i>Governing Partners</i>	83	69	63	70	69	76
<i>General Partners</i>		13	19	13	13	10
<i>Foundation Units</i>		5	4	9	8	10
Total Dues Revenue	\$2.6m	\$2.14m	\$2.23m	\$2.28m	\$2.23m	\$1.45M

* We have invoiced three additional new Partners, which are not included in this count.

**This number does not reflect one Partner who has signaled their resignation. We will wait until after an in-person meeting later this year.

2014 Spring Conference Biographies

2014 New Partners Attending the Spring Conference

J. Adam Abram
Chapel Hill, NC



Adam Abram is Chairman, Franklin Holdings (Bermuda) Ltd., Hamilton, Bermuda and Chairman of James River Group, Inc. He is Chairman of Piedmont Community Bank Holdings, Inc., a federally-chartered bank holding company he founded in 2009. Abram also serves as Chairman of Crescent Financial Corporation (NASDAQ:CRFN), which is controlled by Piedmont.

Abram served as CEO and director of James River Group, Inc., a NASDAQ-listed company, from its inception in 2002 until its sale to Franklin Holdings in December 2007. In 1992, Abram founded Front Royal, Inc., an insurance holding company for which he served as CEO until it was sold in 2001. Prior to founding Front Royal, Inc., Abram founded and served as President of Adaron Group, Inc., a developer of approximately 4 million square feet of commercial property in North Carolina. Abram serves or has served on the board of Human Rights First; the board of directors of the North Carolina Housing Finance Agency; the North Carolina Economic Development Board; the board of the Self-Help Credit Union Venture Fund; the board of the Triangle Land Conservancy; the board of advisors for WUNC Public Radio; the board of the Urban Institute; and the Board of Visitors of the Sanford School of Public Policy at Duke University.

Abram is a 1978 graduate of Harvard University, where he received a bachelor's degree in history. He is married to Rosalind Abram, who is a psychologist in Chapel Hill, NC.

Amalgamated Bank
Washington, DC

Established in 1923 by the Amalgamated Clothing Workers of America, Amalgamated Bank continues the progressive traditions of its founders as the only majority owned union bank in the United States. Chartered by New York State, Amalgamated Bank is an FDIC insured commercial bank with over \$3.5 billion in assets. The Bank's corporate divisions also include Commercial Banking and Real Estate Finance. Through its Investment Management Division, the Bank is also one of the leading providers of investment and trust services to Taft-Hartley plans in the United States. Amalgamated Bank specializes in providing loans and banking services to political and advocacy groups, nonprofit organizations, labor unions and Middle Market companies.

Noel Beasley, Amalgamated Bank
Chicago, IL



Noel Beasley is the Chairman of the Board of Amalgamated Bank and the President of Workers United. Noel Beasley was elected President of Workers United in May 2011.

Building upon his 35 years with Workers United, serving the last 25 years as the director of the Chicago and Midwest region representing sixteen

thousand workers, Noel promises to build new strength for members by focusing on the foundation of workplace leaders and field staff, and continuing the Workers United tradition of recruiting and training member leaders and staff through the union's ambitious education and mobilization program.

Noel began his work with the union in 1974 as a member of the Textile Workers Union of America's Local 1818 in Indiana. He served as shop steward and as chairperson of his Local's bargaining committee. In 1977, Noel became a union representative for ACTWU. In 1983, Noel became the manager of ACTWU's Chicago Joint Board and in 1986 was elected an International Vice-President of UNITE and the manager of the Midwest Regional Joint Board.

**Keith Mestrich, Amalgamated Bank
Washington, DC**



Keith Mestrich is the President of Amalgamated Bank. He brings with him 25 years of experience working with the bank's core constituencies in the labor movement and non-profit organizations. He reports directly to Amalgamated's President and CEO. Keith joined Amalgamated in June of 2012 and directed the bank's Washington Region where he coordinated the bank's operation's in the nation's capital.

Prior to joining Amalgamated Bank, Keith served as the Chief Financial Officer and Deputy Chief of Staff for the Service Employees International Union (SEIU). In his capacity at SEIU, Keith also served as a trustee on three separate Taft-Hartley funds and on the Investment Committee for the SEIU Master Trust.

Keith is a 25-year veteran of the labor movement, beginning his career as a researcher at the AFL-CIO where he gained experience assisting unions on hundreds of organizing, bargaining and political campaigns. In 2002, Keith went to work for UNITE, the bank's majority shareholder, where he served in various capacities including Director of Corporate Affairs, President of one of the union's locals and Executive Assistant to the International President. Following the formation of Worker's United, Keith was named the new union's first Chief of Staff.

Keith is currently on the Board of Directors and serves as Treasurer of the Union Health Center in New York City and the DC Employment Justice Center. He is also on the Board of Directors of the National Consumers League.

Keith received a degree in Political Science and Public Policy from Kalamazoo College where he graduated magna cum laude and was inducted as a member of Phi Beta Kappa.

**Philip Munger
New York, NY**



Philip R. Munger is a philanthropist, political activist and philosophy professor at New School University in New York. He is the son of Charles Munger, the Vice Chairman of Berkshire-Hathaway and business partner of Warren Buffett. He graduated from Stanford University in 1990. He lives in New York City.

New World Foundation (NWF)

New York, NY

Rooted in a long tradition of advancing an ever-expanding view of civil rights in America, the New World Foundation strengthens community-based organizations and local leadership. As a national community foundation, we work from the bottom up to build coalitions around issues that converge in place, creating alliances locally and building movements nationally. Since its founding, the New World Foundation has been guided by a belief in an inclusive democracy that advances environmental safety, economic equality, immigrants' rights, access to education, and democratic participation. Today, these priorities remain at the heart of NWF's vision for a more just democracy. Its papers, "Funding Social Movements" and "Building The New Majority" are widely used by activists and progressive philanthropists.

Heeten Kalan, New World Foundation

Boston, MA



Heeten Kalan is a Senior Program Officer & Director of the Climate Action Fund and the New Majority Fund for New World Foundation. He also oversees NWF's Pooled Fracking Fund, while working closely with allied funders and donors on issues related to fossil fuels and climate change.

Having grown up in apartheid South Africa, Heeten works closely with many South African environmental justice organizations and since the fall of the apartheid regime, he has focused his activism on heightening awareness of the links between the environment and all aspects of health, and the broader socio-economic consequences of unjust environmental policies.

Heeten serves in numerous leadership capacities. He is on the Steering Committee of the Health & Environmental Funders Network (HEFN), the Board Chair of the South Africa Development Fund and the founder of the South African Exchange Program on Environmental Justice, which later became the US office of groundWork, South Africa's strongest environmental watchdog.

Heeten holds a Bachelor's degree from Dartmouth College where he was involved with the anti-apartheid divestment campaign and a Masters in City Planning from Massachusetts Institute of Technology.

Ryan Smith

Salt Lake City, UT

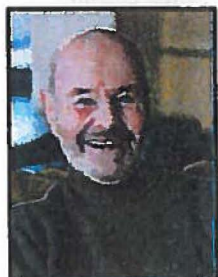


Ryan Smith is currently the founding manager of Variance Ventures, a Salt Lake City based Venture Capital firm that focuses both on high growth startups as well as firms geared towards making a positive social impact with a special eye on firms that can achieve B-Corp certification.

Ryan has been doing Angel and Venture capital investments for the last decade and loves being in spaces where he can take part in and see change happen. Ryan is a board member of Impact Hub Salt Lake, which is part of a global network of local spaces and communities designed to facilitate sustainable impact through collaboration.

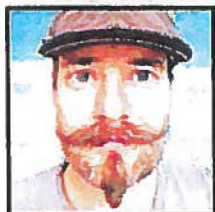
Ryan grew up in Salt Lake City attending West High School and then the University of Utah where he graduated with a B.S. in Finance in '03. Ryan servers on the Advisory Board of Organizing for Action.

Henry van Ameringen
New York, NY



Henry van Ameringen serves on the board of the van Ameringen Foundation, a family foundation that deals with mental health and mental illness in the New York and Philadelphia metropolitan areas. He is also President of the H. van Ameringen Foundation, a personal foundation that concentrates on HIV/AIDS and LGBT issues, mostly in New York City. Henry retired from International Flavors and Fragrances (IFF) as European Vice-President in charge of fragrance marketing. He serves on the board of Fountain House, where people with mental illnesses can find a job, a clubhouse, and friends. He previously served as co-chair of the Board of Directors of In The Life Media, the award-winning nationally televised newsmagazine about LGBT people. In addition to LGBT, HIV, and mental health, Henry funds around reproductive justice, prison reform, and marijuana legalization. Henry is a graduate of the Georgetown School of Foreign Service.

Dirk Wiggins
Washington, DC



Dirk Wiggins is the managing partner for SWITCHBOARD Communications, an automated voter telephone contact consultancy. A computer software analyst by trade, Dirk is also the executive director of Code for Progress. Launched in 2014, the non-profit organization trains community organizers on how to develop web and phone apps that can be used for political and community activism. Originally from Arizona, Dirk has been involved in immigration rights in the state. Dirk now resides in Washington, DC.

New Partners Not Attending the Spring Conference

Colin Greer, New World Foundation



Dr. Colin Greer has been the President of the New World Foundation since 1985. Formerly a Professor at Brooklyn College, CUNY, Colin participated in and directed several studies of US Immigration and urban schooling policy and history at Columbia University and CUNY. He wrote briefing papers on philanthropy and government for First Lady Hillary Clinton and on education policy for Senator Paul Wellstone. He chaired the President's White House Internship Financial Aid Committee (1992-4) and chaired the Funders Committee for Citizen Participation for 10 years.

He serves on the Boards of the Center for Social Inclusion, Philanthropy For Active Civic Engagement (PACE), Teachers and Writers Collaborative (NYC), openDemocracyUSA (US/UK), and several arts and faith-based organizations in both New York City and California.

He was a founding editor of *Change Magazine* and *Social Policy Magazine* and has been a contributing editor to *Parade Magazine* for 17 years. He is the author of several books, including *The Great School Legend* and *Choosing Equality: The Case for Democratic Schooling* (which won the American Library Association's Eli M. Oboler Intellectual Freedom Award), *The Plain Truth of Things*, and *A Call to Character* (co-written with Herbert Kohl). He is the author of plays about Rabbi Joshua Heschel and the Civil Rights era about Spinoza, both produced in NYC and Washington DC. Last Fall his "Imagining Heschel" opened The President's Interfaith and Community service Campus Challenge Conference at Georgetown University.

Rick Segal
Rye, NY



Richard D. Segal (Rick) is the Founder and Chief Executive Officer of Seavest Investment Group, a private investment management firm primarily focused on real estate and private equity investing. The firm manages and sponsors fund investments in healthcare real estate and growth-stage companies in the education, healthcare and consumer technology sectors. He currently serves as Managing Partner of Rethink Education, a Seavest sponsored impact fund investing in companies with innovative technology-based approaches to improve Education domestically and globally. In his role with Seavest, Segal has served on a number of public and private boards of directors, including education-related portfolio companies Wireless Generation (sold to News Corp) and Schoolnet (sold to Pearson).

In his work outside of Seavest, Segal is a trustee of New York Presbyterian Hospital and the Whitney Museum of American Art where he is a member of the Executive Committees and Chair of the Finance Committee. He is also President of the A.L. Mailman Family Foundation, a charitable foundation focused on early childhood care and education. He is a member of the National Finance Committee for the OFA, and a majority member of the D.S.C.C.

Rick lives in Rye with his wife Monica and has four adult children.

2014 Committed Partners Attending Spring Conference

Arcus Foundation

Founded in 2000 by Jon Stryker, the Arcus Foundation is a private grantmaking institution dedicated to the idea that people can live in harmony with one another and the natural world. Arcus' work is based on the belief that respect for diversity among peoples and in nature is essential to a positive future for our planet and all of its inhabitants. The Foundation works globally and has offices in New York City and Cambridge, UK.

Jason McGill, Arcus Foundation

New York, NY



Jason McGill is Vice President, Social Justice Programs at the Arcus Foundation. Jason brings to the Foundation a deep engagement with progressive social movements and extensive knowledge of the ways institutional philanthropy can best partner with, support and advance these movements. Prior to joining Arcus, he worked for nine years at Philanthropy New York, the primary membership association for New York's philanthropic sector. As Vice President of Member Services there, he conceived and implemented numerous platforms for philanthropic collaboration, learning, and collective action among the organization's 285 member foundations. Earlier in his career, he served as the first Director of Alumni and Philanthropic Programs at Sponsors for Educational Opportunity (SEO), where he built a robust international network of young professionals of color committed to giving back to their communities of origin. He completed his Ph.D. in African American and Early U.S. history at the University of Michigan, and A.B. (Sociology) and B.S. (Urban Studies) degrees at Cornell University, and has taught at Swarthmore College, the University of Michigan, Rutgers University.

Jeanne Findlater

Naples, Florida



Jeanne Findlater is a retired broadcasting and journalism professional. Jeanne retired as CEO of ABC affiliate WXYZ-TV in Detroit. She began her career at WXYZ in 1971 as a staff producer then as a program director. In 1979, Jeanne named as WXYZ's general manager, becoming the first woman to become GM at a large market television station. Jeanne was formerly the president of the Michigan Association of Broadcasters and served on the Supreme Court Commission of Court Reform and the Governor's Commission on Education. Jeanne was inducted into the Michigan Broadcasting Hall of Fame in 2001. Jeanne resides in Naples, FL and is the mother of DA Partner Chris Findlater.

Rockefeller Family Fund

New York, NY

Martha, John, Laurance, Nelson, and David Rockefeller created the Rockefeller Family Fund (RFF) in 1967. Since then, RFF has worked at the cutting edge of advocacy in such areas as environmental protection, advancing the economic rights of women, and helping citizens hold public and private institutions accountable for their actions. RFF is known for its creative grantmaking, its role as a catalyst in the nonprofit as well as the funding communities, and its record of public policy innovation.

Lee Wasserman, Rockefeller Family Fund



Lee Wasserman was appointed Director and Secretary of the Rockefeller Family Fund in 1999. Prior to the Family Fund, he worked with the Pew Charitable Trusts. Previously, he was the executive director of Environmental Advocates of New York, one of the nation's leading state-based environmental organizations.

Earlier in his career, Lee served as Assistant Counsel to then-Speaker of the New York State Assembly, Stanley Fink. He also served on the Transition Team of Governor George Pataki. He is a board member of Environmental Advocates, Riverdale Neighborhood House, and a past president of the Environmental Federation of New York. He has repeatedly served in leadership roles with the Environmental Grantmakers Association, the nation's premier environmental foundation affinity organization. In 2012, in recognition of his career accomplishments, Lee was inducted into the Schenectady City School District Hall of Fame.

Lisa Guide, Rockefeller Family Fund



Lisa Guide joined RFF in 2002. Prior, she was founder and executive director of a nonprofit strategic communications firm, but most of her career has been spent in government and politics.

Lisa was in federal service for all eight years of President Clinton's administration, serving in a variety of positions at the Interior Department and the White House. These included acting Assistant Secretary of the Interior for Policy, Management and Budget and Deputy Assistant Secretary for Policy and International Affairs. Lisa also served two years at the White House Council on Environmental Quality. She spent eight years working in politics and government in New Jersey, as state communications director of the 1992 Clinton presidential campaign and communications director for the N.J. State Attorney General.

Prospects Attending the Spring Conference

Lara Bergthold
Los Angeles, CA



Lara Bergthold, Principal of Griffin Schein, is a campaign and communications strategist who has worked as a philanthropic advisor, political strategist, presidential senior campaign advisor, and PAC director. As Executive Director of the Lear Family Foundation, a private foundation of Lyn and Norman Lear, Lara directed millions of dollars of grants annually to progressive organizations working on civil liberties, civil rights, the environment and the arts, among others. Lara has served as the Board Chair of People for the American Way since 2000 and Board Chair of Campaign for America's Future since 2007.

Joseph Falk
Coconut Grove, FL



Joseph Falk is a Policy Consultant with the law firm of Akerman Senterfitt and a licensed Florida mortgage originator. The firm employs over 500 attorneys and consultants through 19 offices, including Florida, New York and Washington DC. Prior to joining Akerman, he was President of Metropolitan Mortgage Company (MMC). MMC was part of a diversified portfolio of companies owned by the Falk family. T

In addition to being Secretary of the Victory Fund, Joseph Falk is the immediate past Chairman of the Board of SAVE DADE, a Miami-Dade LGBT political and equal rights organization. He is also national Co-Chairman of the Obama for America LGBT Leadership Counsel. Joseph Falk is a Phi Beta Kappa graduate of Franklin and Marshall College in 1976 and received his MBA from the Harvard Business School in 1978. He now resides in Miami, Florida.

Anna Fink, Wyss Foundation
Washington, DC



Anna Fink is a Program Officer, Women's Equality at the Wyss Foundation. She joined the Women's Equality Program in Jan 2014. Anna formerly was the Senior Advisor on Philanthropy and Innovation for the AFLCIO. Prior to that, Anna was the Program Officer for the New World Foundation. The Wyss Foundation is a private, charitable foundation dedicated to supporting innovative, lasting solutions that improve lives, empower communities, and strengthen connections to the land.

Dave Horwich
Chicago, IL



Dave Horwich is the Director of Special Projects at Newsweb Corp. Dave also serves as investment advisor to Fred Eychaner, the head of Newsweb Corporation. Newsweb Corp. owns affiliates of the UPN network in Chicago and Denver in addition to nine Chicago radio stations. Newsweb is also the provider of the Lexis/Nexis Legal Research System. In 1991, Eychaner

established the Alphawood Foundation. The foundation's main areas of interest are the arts, arts education for children, institutional advocacy, domestic violence intervention programs, and architecture and preservation. Eychaner was a major supporter of Hillary Clinton's presidential campaign.

**Anna Lefer Kuhn, Arca Foundation
Washington, DC**



Anna Lefer Kuhn is the Executive Director of the Arca Foundation, which works to advance social justice and human rights in the US and abroad. During Anna's tenure, Arca has turned its attention toward growing economic inequality, promoting citizen engagement in Wall Street accountability as a means to advance a more equitable economy and just democracy. Prior to Arca, Anna was a Program Officer at the Open Society Foundation. Anna is the Co-Chair the Funders Committee for Civic Participation, is a trustee of the Center for Working Families, and is on the advisory board of the Youth Engagement Fund, a project she launched with the Democracy Alliance in 2008. She previously served on the boards of the White House Project, the Urban Justice Center and the League of Young Voters. Anna is a graduate of Wesleyan University, and was a member of the 2004-2005 class of Coro Leadership New York.

**Alan Solow
Chicago, IL**



Alan Solow is a partner in the Chicago office of DLA Piper. Solow has actively practiced in bankruptcy and restructuring law for more than 30 years. Alan represents secured and unsecured creditors, including indenture trustees, covering the range of legal services from workout planning through active participation in bankruptcy cases. He has also undertaken the representation of government agencies, equity holders and debtors. Alan has been involved in cases not only in Illinois, but also in Delaware, New York, California, Florida, Minnesota, Iowa, Wisconsin, North Carolina, Texas, Pennsylvania and Michigan, among other jurisdictions.

**Andrea Solow,
Chicago, IL.**

Andrea Lavin Solow was appointed by President Obama to serve a member of United States Holocaust Memorial Council. Andrea Lavin Solow serves on the Governing Board of the American Friends of the Yitzhak Rabin Center. She is also on the boards of the World Confederation of Jewish Community Centers and the Interfaith Youth Core. She is a former member of the Women's Board of the Jewish Federation of Metropolitan Chicago and the Board of Project Interchange. She previously served as Chair of Partnership 2Gether and Vice President of the Hyde Park Jewish Community Center. Ms. Solow received a B.A. from the University of Illinois.

Katrina vanden Heuvel
New York, NY



Katrina vanden Heuvel is the editor, publisher, and part-owner of the magazine *The Nation*. She has been the magazine's editor since 1995. A published author and political columnist, Katrina is a frequent guest on numerous television programs. She is a member of the Council on Foreign Relations and serves on the boards of Institute for Policy Studies, the World Policy Institute, the Correctional Association of New York, and the Franklin and Eleanor Roosevelt Institute and previously served on the board of the Institute for Women's Policy Research. Katrina is a recipient of Planned Parenthood's Maggie Award for her 2003 article, "Right-to-Lifers Hit Russia," a report on the pro-life movement in that country.

Prospects Attending National Funders Convening

John Atkinson
Chicago, IL



John Atkinson is the Managing Partner and Co-Practice Leader of Willis' Senior Living Practice Group. Willis Group Holdings plc is a leading global insurance broker. Through its subsidiaries, Willis develops and delivers professional insurance, reinsurance, risk management, financial and human resource consulting and actuarial services to corporations, public entities and institutions around the world. John Atkinson was mentioned as a possible opponent to Pat Quinn but he did not run.

Kevin Conlon
Chicago, IL



Kevin Conlon is the founder and President of Conlon & Dunn. Kevin offers the firm's clients a unique understanding of the public arena derived from over 30 years of experience in law, government, venture capital and non-profit organizations. Prior to the formation of the firm, Kevin practiced labor and employment law for 15 years. As District Counsel for the Communications Workers of America, Kevin represented more than 70,000 union members employed in the public and private sectors. During this time, he was appointed by President Bill Clinton to the Presidential Advisory Committee on Expanding Training Opportunities. Kevin served as a member of the National and Illinois Finance Committees for the Obama 2012 presidential campaign.

Joan Davidson
New York, NY



Joan Davidson is trained as an urban planner, and spent a decade working in city government. She worked first as a planner for the NYC Dept. of City Planning, and then as part of a team for the Dept. of Human Resources where she developed transitional housing for the homeless. Ms. Davidson was also VP for Public/ Community Affairs for Gannett Outdoor, a subsidiary of the Gannett media company. Ms. Davidson recently completed a Masters Degree in the History of the Decorative Arts and Design from Parsons School of Design and Cooper-Hewitt National Design Museum. Ms. Davidson is a member of the American Friends of the Centre Pompidou, a group that studies contemporary art and architecture and assists the Paris museum with acquisitions.

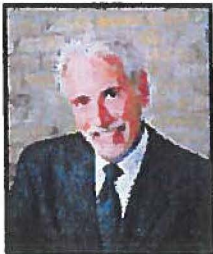
Christian Ettinger
San Francisco, CA



Christian Ettinger is the grandson of Richard Prentice Ettinger, the Co-Founder of Prentice-Hall, Inc., the world's leading publisher of middle school and high school textbooks and technology. Christian's own background is in philanthropy, filmmaking and environmental issues. After receiving a Masters in Political Science, for the next decade he worked as a reporter, editor and publisher of various publications including the Ross Valley

Reporter, Cups Magazine and theposition.com. Over the past decade, Christian has been involved in philanthropic work through the Educational Foundation of America, the Ettinger Foundation, and Threshold Foundation. Christian's primary philanthropic interests have included peace and security issues, civic engagement issues, environmental issues and sustainable population. Currently, he serves as Chairman of Sustainable Population Committee with the Educational Foundation of America, a board member of the environmental advocacy non-profit Inform, and is seeking an MPA in Sustainable Management at the Presidio Graduate School.

**Paul Fairchild, Cream City Foundation
Milwaukee, WI**



Paul R. Fairchild is the President and CEO of Cream City Foundation, a community based foundation focused on funding lesbian, gay, bisexual and transgender (LGBT) programs and organizations working towards social change in southeastern Wisconsin. Fairchild has worked with several of the Midwest's most prestigious LGBT organizations. Hailing from Chicago, he most recently served as Chief Development Officer and interim CEO for Howard Brown Health Center, the Midwest's largest provider of healthcare to LGBT individuals. Before joining Howard Brown, Fairchild served as Director of Development at Horizons Community Services, now known as the Center on Halsted and Vice President for Donor & Community Relations for Heartland Alliance for Human Needs & Human Rights.

**Bob Glovsky
Boston, MA**



Bob Glovsky is Vice Chair and a Principal of The Colony Group. Prior to joining The Colony Group in July 2012, Bob was a founder and the President of Mintz Levin Financial Advisors, which provided wealth management and investment advisory services to individuals and families. Bob brings more than 30 years of experience in financial and tax planning and money management with a focus on asset allocation and investment strategies.

**Daniel Hildreth
Portland, ME**

Daniel Hildreth is the board chair of Diversified Communications, a trade media and TV broadcasting company based in Portland. Before going on GrowSmart Maine's board, he was a member of GrowSmart Maine's steering committee for the original Charting Maine's Future (the "Brookings report"). He has also served on the boards of the Gulf of Maine Research Institute and Maine Audubon, and on the town of Falmouth's Conservation Commission. He graduated from Bowdoin College and the Johns Hopkins School of Advanced International Studies.

Susan Jacobson
Philadelphia, PA



Susan Jacobson is President of Jacobson Strategic Communications, a public relations and public affairs company based in Philadelphia. Jacobson Strategic Communications provides specialized, targeted communications services to prominent local and national clients. A sample of clients includes: The Philadelphia International Airport, The University of Pennsylvania, The Philadelphia Eagles, and Clear Channel.

Before that, Susan served for ten years as an Executive Vice President at a large communications firm. She ran communications programs for clients including: Pennsylvania Tourism and Economic Development, Pennsylvania Workforce Development, PennDOT, and the Jack Welch Management Institute.

Mahsa Pelosky,
New York, NY



Born in Tehran, Iran, Mahsa Pelosky moved to the United States in 1987, attended Fordham University and was a fundraiser for Rudy Giuliani's '93 Mayoral race and George Pataki's '94 race for Governor. She joined the Giuliani Administration at the Department of Housing Preservation & Development and then at the Commission for the United Nations & Consular Corps. Mahsa went on to the Estee Lauder Companies in 1997 until 2003.

Since 2003 Mahsa has led her family's philanthropic endeavors. Among other causes, she and her husband sponsored a 5-year speaker series at The George Washington University to bring high profile speakers to GW. They also endowed the Jay and Mahsa Pelosky International Student Internship Fund at the Sanford School of Public Policy at Duke University. Mahsa lives in Manhattan with her husband Jay Pelosky, a private investor, and their two children.

United Food and Commercial Workers, Nikki Budzinski



Nikki Budzinski is the political Director at the United Food and Commercial Workers (UFCW). UFCW represents 1.3 million people working primarily in grocery and retail stores, and in the food processing and meat packing industries.

Prospects Possibly Attending the Conference or Convening

Bill Freeman
Nashville, TN



Bill Freeman serves as Chairman of Freeman Webb, Inc., a real estate investment, management and brokerage company he co-founded with partner James A. Webb, III in 1979.

A strong supporter of charitable and community organizations throughout his career, he has served on the boards of the Tennessee State University Foundation, the Nashville Area YMCA, the Nashville Public Television Council and Children's House. An alumnus of the Leadership Nashville program (1979-1980), he has served as commissioner of the Nashville Convention Center and on the board of The Tennessee Housing

Development Agency. He was named Man of the Year by the Nashville Area Junior Chamber of Commerce in 1977. Freeman and his wife, Babs Tinsley Freeman, and their three sons live in Nashville.

Sandra McNeill Rogers
Morristown, NJ

Sandra McNeil Rogers is an OFA supporter from Morristown, NJ. In 2010, she won the Powerball jackpot and received \$100 million in after-tax earnings. She previously served on the local school board. She began contributing politically in 2012.

Laura Ricketts
Chicago, IL



Laura Ricketts is the Director and part owner of the Chicago Cubs as well as Chairman of the Board of Chicago Cubs Charities. Ricketts is the first openly gay woman to own an MLB franchise. She is co-chair of the DNC's LGBT Leadership Council and the National Leadership Counsel for Lambda Legal. Ricketts took her political advocacy a step further founding LPAC, the first lesbian super PAC, Ricketts is a graduate of University of Chicago and received her law degree from the University of Michigan.

Adele Simmons
Chicago, IL



Adele Simmons is Vice-Chair of Metropolis Strategies. At Metropolis, she leads their work in Sustainability. She co-chaired the Task Force that developed a Climate Action Plan for the City of Chicago, at the request of the Mayor, and is a member of the Green Ribbon Committee that is helping to implement the Plan. She also served as a co-chair of the Council on Global Affairs study group on Chicago's global future, and a member of the Council's Energy Task Force. She is President of the Global Philanthropy

Partnership, which works to strengthen the infrastructure of global philanthropy and is editor of Global Giving Matters. Prior to joining Metropolis, Mrs. Simmons was President of the John D. and Catherine T. MacArthur Foundation for a decade, overseeing grants of over \$1.5 billion, including an annual \$25 million program for Chicago.

Constituent Name	First Name	Last Name	DA Status	Conference status	Proposed Conferenece Friend	Proposed Additional Conference Friend	Proposed First Year Mentor	Proposed Welcome Cocktail Presenter	Attending Welcome Cocktails
Abram Adam	Adam	Abram	New Partner 2014	registered	Joe Zimlich	Doug Phelps	Anne Bartley	Anne Bartley	yes
Abram Adam	Jay	Reiff	Advisor	registered	n/a		n/a		yes
Amalgamated Bank	Noel	Beasley	New Partner 2014	registered	Mary Kay Henry		John Stocks	John Stocks	yes
Amalgamated Bank	Keith	Mestrich	New Partner 2014	registered	Mary Kay Henry		John Stocks	John Stocks	yes
Munger Philip	Philip	Munger	New Partner 2014	registered	Ian Simmons		Ian Simmons	Ian Simmons	yes
New World Foundation	Colin	Greer	New Partner 2014	not attending	n/a		John Stocks	n/a	no
New World Foundation	Heeten	Kalan	New Partner 2014	registered	Guillermo Quinteros		n/a	John Stocks	no
Segal	Rick	Segal	New Partner 2014	not attending	n/a		Paul Egerman	Paul Egerman	no
Smith Ryan	Ryan	Smith	New Partner 2014	registered	Paul Rudd		Weston Milliken	Ian Simmons	no
van Ameringen Henry	Henry	van Ameringen	New Partner 2014	registered	Ted Trimpa		Weston Milliken	Ted Trimpa	yes
van Ameringen Henry	Chris	Cormier	Advisor	registered	Weston Milliken		n/a		yes
Wiggins Dirk	Dirk	Wiggins	New Partner 2014	registered	Paul Rudd	Emily Sussman	Ian Simmons	Jim Gollin	yes
Arcus Foundation	Jason	McGill	Committed	registered	Ted Trimpa				
Findlater Jeanne	Jeanne	Findlater	Committed	registered	Cynthia Ryan		Chris Findlater	Chris Findlater	
Rockefeller Family Fund	Lisa	Guide	Committed	registered	Anne Bartley		Anne Bartley	Anne Bartley	
Rockefeller Family Fund	Lee	Wasserman	Committed	registered	Bill Roberts		Anne Bartley	Anne Bartley	
Arca Foundation	Anna	Lefer Kuhn	Sneak Peek	registered	Kathleen Welch				
Eychaner Fred	Dave	Horwich	Sneak Peek	registered	John Stocks				
Falk Joesph	Joseph	Falk	Sneak Peek	registered	Weston Milliken	Chris Findlater			
Freeman William	Bill	Freeman	Sneak Peek	maybe	Lou Frillman				
Lear Norman	Lara	Bergthold	Sneak Peek	registered	Marcy Carsey				
McNeil Rogers Sandra	Sandra	McNeil Rogers	Sneak Peek	maybe	Lou Frillman				
Solow Alan	Alan	Solow	Sneak Peek	registered	Lou Frillman				
vanden Heuvel Katrina	Katrina	vanden Heuvel	Sneak Peek	registered	Rob McKay	Jim Gollin			
Wyss	Anna	Fink	Sneak Peek	registered	Alexandra Russell				
Atkinson John	John	Atkinson	Convening	registered	Lou Frillman				
Conlon Kevin	Kevin	Conlon	Convening	registered	Lou Frillman				
Davidson Joan	Joan	Davidson	Convening	registered	Cynthia Ryan				
Cream City Foundation	Paul	Fairchild	Convening	registered	Anne Summers	Linda Honold			
Ettinger Christian	Christian	Ettinger	Convening	registered	Jim Gollin	Alan Davis			
Glovsky Bob	Bob (OFA)	Glovsky	Convening	registered	Lou Frillman				
Hildreth Daniel	Daniel	Hildreth	Convening	registered	Ian Simmons	Donald Sussman			
Jacobson Susan	Susan	Jacobson	Convening	registered	Cynthia Ryan				
Pelosky Mahsa	Mahsa	Pelosky	Convening	registered	Cynthia Ryan				
UFCW	Nikki	Budzinski	Convening	registered	Cristina Uribe				
Boskind Paul	Paul	Boskind	New Partner 2013	registered			Weston Milliken		
CWA	Larry	Cohen	New Partner 2013	registered			John Stocks		
AFT	Randi	Weingarten	New Partner 2013	registered			Mary Kay Henry		
CWA	George	Kohl	New Partner 2013	registered			Paul Booth		
AFT	Michelle	Ringnette	New Partner 2013	registered			Karen White		
Goldman Amy	Amy	Goldman	New Partner 2013	not attending			Quinn Delaney		
SEIU	Maddy	Melton	New Union Participant	not attending				Mary Kay Henry	
Tides Foundation	Kriss	Deiglmeier	New Foundation Participant	not attending				Rob McKay	
Gill Foundation	Courtney	Cuff	New Foundation Participant	not attending				Ted Trimpa	

MEMORANDUM

TO: DA Board of Directors
FROM: Stephanie Mueller
RE: DA Spring Conference Messaging and Q&A
DATE: April 22, 2014

Below are talking points and FAQs about the upcoming conference. Please note that any press requests should be directed to Stephanie Mueller, who will be in attendance at the Chicago meeting and can be reached at 202-256-0833 or stephanie@berlinrosen.com.

Overall Messaging and Q&A

- ❖ Over the past 9 years, the Democracy Alliance has aligned donors, leaders in the progressive movement, and political infrastructure in order to achieve victories at the ballot box and in policy fights including those for comprehensive health care reform, Supreme Court confirmations, and pay equity protections for women, among many.
- ❖ We've helped to build, and in some cases, create, key organizations which comprise the policy, campaign and electoral infrastructure of the progressive movement, like the Center for American Progress, Catalist and America Votes.
- ❖ We've strengthened and brought significant new funds to a network of anchor organizations in the progressive movement, including the Center for Community Change, the Center on Budget and Policy Priorities, and the American Constitution Society.
- ❖ We are the largest convener of progressive individual and institutional donors and serve as a "center of gravity" for the progressive funding world. We offer analysis of the elements of a functioning progressive movement and then make recommendations to funders on the specific organizations they can support so it can succeed.
- ❖ Over the next few days we are bringing together leaders in the progressive movement to develop strategies to take on the biggest challenges confronting us and our country over the long term and our role moving forward.
- ❖ We will discuss work that has been done already and map out a plan for achieving results moving forward in these key areas:
 - Winning comprehensive immigration reform;
 - Saving our planet through a commitment to clean energy;
 - Ending the corrupting influence of money in our political system;
 - Advancing solutions for gun violence prevention; and
 - Ensuring all eligible voters are able to participate in our democracy.
- ❖ We see a future where every American has the opportunity to succeed. That means access to good, secure jobs; policies that foster the development of American sources of energy; a tax structure that

encourages investment, protects the middle class and allows the government to perform its core support services; freedom for women to control their bodies; marriage equality for all; an environment that keeps our kids safe and an education system that prepares them to compete in a global economy.

Q & A

Why are you hosting this conference?

- We regularly host meetings with our Partners and progressive organizations to strategize about what we can do to ensure a progressive future for the country.
- This week our Partners will hear from many of the country's most influential progressive organizations and elected officials to discuss plans for the upcoming election and debates in Congress over key issues such as comprehensive immigration reform, climate change, gun violence prevention, and the corrupting influence of money in our political system.
- Our Partners will be hearing from a variety of experts to decide the most effective and appropriate role for us to play moving forward.

Who exactly do you and your donors fund?

- We recommend to our Partners a group of organizations and efforts that help move forward progressive thinking, policies and values.
- Over the past nine years our Partners have funded over forty organizations that have redefined the infrastructure around which progressives organize. Through groups like the Center for American Progress, we have helped support an institute for progressive thought leadership that has redefined debates. Our communities are far better organized from the ground up because of DA funded groups like America Votes that coordinates progressive civic engagement activities at the local, state and national level. Our investment in Catalist, a first of its kind super voter file, has provided a unique tool to our allies as they target progressives across the country and our investment in the National Organizing Institute has helped the progressive community excel at innovative online organizing strategies.
- We also support collaborative efforts that address core needs in the development of a progressive infrastructure. For example, we bring together a consortium of organizations committed to working with Latinos, African Americans, women, and youth to make their voices heard in our democracy.

How is the DA any different from the Koch brothers?

- There's really no comparison. The Democracy Alliance doesn't give money directly. We identify and vet organizations that are doing the work our Partners think is important. Our Partners then give to those organizations.
- The Democracy Alliance doesn't represent a single industry or family – it was organized to provide a forum for people with a shared set of principles to coordinate their resources more efficiently and effectively to achieve their common goals.
- We work with institutions and leaders committed to developing a more progressive America. We don't get involved with dictating the policy and programmatic direction of those organizations.

How do you see yourselves compared to American Crossroads or the RNC or any others on the right?

- We don't define ourselves as being similar to or different than other organizations. We saw a need in the progressive community -- to allow donors to coordinate their giving in order to increase its impact -- and we responded. We have a singular model that we believe has successfully provided our members a way to collaborate in a democratic fashion to move this country forward.
- The DA members are our constituents, and the DA members are committed to strengthening the organizations and leaders committed to a progressive future.

Is your selection of a new President an indication of a change in direction for the DA?

- No, the DA Board of Directors chose Gara LaMarche in order to build on and expand the work the DA has accomplished since its creation eight years ago.
- The DA leadership is focused on these key goals: inspiring more funding to the progressive movement, enabling greater Partner-to-Partner interaction, supporting new funder initiatives/tables, and opening up our community to other allies.
- Not only has Gara been an advocate for human rights and social justice, at the ACLU and Human Rights Watch, among others, but he has worked closely with many in the donor community through his work at the Atlantic Philanthropies and the Open Society Institute. This is a pivotal moment for the DA and Gara was chosen because he is the perfect person to lead the DA through its next phase of development.

Why doesn't the DA disclose its members?

- In short, we abide by the preferences of our members. Many of our donors choose not to participate publicly, and we respect that. The DA exists to provide a comfortable environment for our partners to collectively make a real impact.
- The composition of our membership isn't all that hard to figure. Our board is public, and the Democracy Alliance has been around for some time now.

If you can't reveal who your donors are, perhaps you can talk about them in general terms.

- Our members join the DA to align their resources towards building and maintaining progressive infrastructure around values of equality, opportunity, justice and prosperity.

Are you looking to grow your membership? What kind of membership growth goals has the DA set?

- We are always interested in bringing in more Americans committed to a stronger future.
- While we do not have specific recruitment goals, we have proven over the past six years that our model works: working together, we can build the kind of infrastructure that supports the policies and highlights to all Americans the advantages of a progressive future. Not surprisingly, that success has attracted other individuals and families that are committed to keeping the country on the right track.

Will you share your agenda?

- I'm happy to talk with you about some of the conversations that will happen at the conference and the speakers who will be joining us.

Will you share the names of your conference attendees?

- As a matter of policy, we don't make public the names of our members.

Reporters
Spring 2014 Conference



Ryan Grim, Huffington Post



Bill McMorris, Washington Free Beacon



Andrew Stiles, Washington Free Beacon



Ken Vogel, Politico



CJ Ciaramella, Washington Free Beacon

Reporters
Spring 2014 Conference



Adam Kredo, Washington Free Beacon



Elizabeth Harrington, Washington Free Beacon



Brent Scher, Washington Free Beacon



Alana Goodman, Washington Free Beacon



Lachlan Markay, Washington Free Beacon

Reporters
Spring 2014 Conference



Monique Hamm, Washington Free Beacon



Bill Gertz, Washington Free Beacon



Sonny Bunch, Washington Free Beacon



Byron Tau, Politico



Susan Duclos, Wake Up America

Reporters
Spring 2014 Conference



Jennifer Haberkorn, Politico



Tarini Parti, Politico



Lynn Sweet, Chicago Sun-Times



Steve Huntley, Chicago Sun-Times



Rick Pearson, Chicago Tribune



MEMORANDUM

TO: Democracy Alliance Board of Directors
FROM: Julie Kohler
RE: March 2014 Finance Update
DATE: April 9, 2014

This memo outlines key Alliance financial statistics through March 2014.

Summary of 2014 Year to Date Financial Activities

As of March 31, 2014, the Democracy Alliance had \$1,564,690 cash on hand.

Revenue

Earned Income, Existing Partners	\$ 1,321,300
Earned Income, New Partners	\$ 90,000
Earned Income, Strategic Initiatives	\$ 200,000
Contributions	\$ 835,000
Conference Registration/Revenue	\$ 35,000
Interest Income	\$ 553
Total Revenue	<u>\$ 2,481,853</u>
Expenses	\$ 911,182
Net Revenue	<u>\$ 1,570,671</u>

Expenses

As in prior years, we are initially conservative with our spending while we work to confirm Legacy contributions. Although we have several significant Legacy contributions yet to confirm, we are still optimistic that they will come through, as budgeted, and if our recruitment keeps pace for Qs 2-4 with Q1, we remain on track to end 2014 between \$4.9-\$5 million in revenue and expenses.

Democracy Alliance

Balance Sheet

As of March 31, 2014

Mar 31, 14

ASSETS

Current Assets

Checking/Savings

10102 · PNC Checking Democracy Allianc 1,564,689.73

Total Checking/Savings 1,564,689.73

Other Current Assets

14100 · Employee Advances 526.02

14120 · Security Deposit 40,500.00

Total Other Current Assets 41,026.02

Total Current Assets 1,605,715.75

Fixed Assets

15000 · Fixed Assets

15400 · Leasehold Improvements 8,085.00

15500 · Accumulated Depreciation -216,205.08

15030 · Website 60,689.14

15100 · Furniture & Fixtures 17,623.95

15200 · Office Equipment 170,656.38

Total 15000 · Fixed Assets 40,849.39

Total Fixed Assets 40,849.39

TOTAL ASSETS 1,646,565.14

LIABILITIES & EQUITY

Liabilities

Current Liabilities

Credit Cards

20200 · American Express 61004 -1,328.00

20190 · Bank of America 2228 -4,598.22

20160 · Bank of America 4972 -2,272.73

Total Credit Cards -8,198.95

Other Current Liabilities

23150 · 401K Payable -3,135.93

23200 · Flexible Spending Account Paybl 2,414.59

Total Other Current Liabilities -721.34

Total Current Liabilities -8,920.29

Total Liabilities -8,920.29

Equity

Democracy Alliance

Balance Sheet

As of March 31, 2014

Mar 31, 14

30200 - Retained Earnings
Net Income
Total Equity

84,813.84
1,570,671.59
1,655,485.43

TOTAL LIABILITIES & EQUITY

1,646,565.14

Democracy Alliance
Profit & Loss Budget Performance
March 2014

	Mar 14	Budget	\$ Over Budget	Jan - Mar 14	YTD Budget	\$ Over Budget	Annual Budget
Revenue							
41000 · Earned Income							
41090 · Retention	165,400.00	250,000.00	-84,600.00	1,276,300.00	1,250,000.00	26,300.00	2,225,000.00
41200 · Retention 2013	0.00	0.00	0.00	45,000.00	0.00	45,000.00	0.00
41300 · New Partners	30,000.00	30,000.00	0.00	90,000.00	60,000.00	30,000.00	480,000.00
41700 · Conference Registration	10,000.00	0.00	10,000.00	35,000.00	0.00	35,000.00	90,000.00
41800 · Contributions	50,000.00	260,000.00	-210,000.00	1,035,000.00	1,160,000.00	-125,000.00	1,795,000.00
41900 · New Revenue	0.00	100,000.00	-100,000.00	0.00	100,000.00	-100,000.00	338,525.00
Total 41000 · Earned Income	255,400.00	640,000.00	-384,600.00	2,481,300.00	2,570,000.00	-88,700.00	4,928,525.00
43000 · Other Income							
43200 · Interest Income	242.37	208.00	34.37	553.43	624.00	-70.57	2,500.00
Total 43000 · Other Income	242.37	208.00	34.37	553.43	624.00	-70.57	2,500.00
Total Revenue	255,642.37	640,208.00	-384,565.63	2,481,853.43	2,570,624.00	-88,770.57	4,931,025.00
Gross Profit	255,642.37	640,208.00	-384,565.63	2,481,853.43	2,570,624.00	-88,770.57	4,931,025.00
Expense							
50010 · Expenses							
50100 · Personnel							
50110 · Salaries	157,709.05	159,958.00	-2,248.95	471,046.35	479,877.00	-8,830.65	1,919,500.00
50115 · Insurance/Benefits	12,019.77	20,794.00	-8,774.23	42,557.34	62,388.00	-19,830.66	249,535.00
50117 · 401K Expense	8,384.22	11,196.00	-2,811.78	28,895.59	33,600.00	-4,704.41	134,365.00
50119 · Payroll Taxes	11,893.56	11,196.00	697.56	38,923.68	33,600.00	5,323.68	134,365.00
50150 · Professional Development	800.00	4,062.50	-3,262.50	3,069.23	12,187.50	-9,118.27	48,750.00
Total 50100 · Personnel	190,806.60	207,206.50	-16,399.90	584,492.19	621,652.50	-37,160.31	2,486,515.00
52000 · Professional Services							
52100 · Accounting & Finance	27,994.40	9,180.00	18,814.40	40,008.55	27,540.00	12,468.55	110,160.00
52200 · Consultants	21,898.75	24,667.00	-2,768.25	69,172.50	74,001.00	-4,828.50	355,000.00
52300 · Marketing & Design	0.00	3,250.00	-3,250.00	0.00	9,750.00	-9,750.00	69,000.00

Dem... Alliance
Profit & Loss Budget Performance
March 2014

	Mar 14	Budget	\$ Over Budget	Jan - Mar 14	YTD Budget	\$ Over Budget	Annual Budget
52400 · Temporary Help & Interns	0.00	2,600.00	-2,600.00	0.00	7,800.00	-7,800.00	61,200.00
52550 · IT	5,543.32	4,833.00	710.32	6,283.22	14,499.00	-8,215.78	68,000.00
52500 · Legal	4,250.62	6,500.00	-2,249.38	10,016.32	19,500.00	-9,483.68	78,000.00
Total 52000 · Professional Services	59,687.09	51,030.00	8,657.09	125,480.59	153,090.00	-27,609.41	741,360.00
54000 · Conference & Meetings							
54100 · AV & Equipment	31.71	0.00	31.71	31.71	0.00	31.71	266,000.00
54200 · Catering	0.00	0.00	0.00	0.00	0.00	0.00	390,000.00
54300 · Entertainment	0.00	0.00	0.00	0.00	0.00	0.00	20,000.00
54400 · Facilities Fee	0.00	0.00	0.00	0.00	0.00	0.00	29,000.00
54500 · Other Meeting Expense	3,322.75	5,210.00	-1,887.25	3,435.43	15,630.00	-12,194.57	84,273.00
54600 · Staff Meals	194.50	0.00	194.50	194.50	0.00	194.50	7,000.00
Total 54000 · Conference & Meetings	3,548.96	5,210.00	-1,661.04	3,661.64	15,630.00	-11,968.36	796,273.00
55000 · Operations							
55100 · Bank service charges	78.82	333.00	-254.18	354.24	999.00	-644.76	4,000.00
55125 · Dues & Memberships	0.00	0.00	0.00	0.00	0.00	0.00	5,000.00
55150 · Equipment Capital	15,896.52	25,000.00	-9,103.48	18,839.42	25,000.00	-6,160.58	32,000.00
55200 · Equipment Lease & Rental	597.97	600.00	-2.03	2,391.88	1,800.00	591.88	7,200.00
55300 · Gifts	33.69	250.00	-216.31	430.40	750.00	-319.60	3,000.00
55400 · Hosting	0.00	583.00	-583.00	1,500.00	1,749.00	-249.00	7,000.00
55450 · Insurance	3,744.13	0.00	3,744.13	6,500.79	18,000.00	-11,499.21	25,700.00
55475 · Lease	15,353.00	15,278.00	75.00	45,498.00	45,834.00	-336.00	183,336.00
55500 · License & Fees	1,450.75	42.00	1,408.75	1,450.75	126.00	1,324.75	500.00
55550 · Meals & Entertainment	5,205.02	1,250.00	3,955.02	13,769.59	3,750.00	10,019.59	25,000.00
56105 · Office Supplies	2,216.54	3,500.00	-1,283.46	4,125.31	10,500.00	-6,374.69	48,000.00
56200 · Parking	658.47	113.00	545.47	1,755.92	339.00	1,416.92	2,100.00
56250 · Postage/Shipping	1,100.96	1,867.00	-766.04	2,213.47	5,601.00	-3,387.53	28,400.00
56300 · Printing	1,848.55	4,060.00	-2,211.45	1,848.55	12,180.00	-10,331.45	78,733.00
56400 · Sponsorships	0.00	833.00	-833.00	1,350.00	2,499.00	-1,149.00	10,000.00
56450 · Subscriptions	6,302.73	3,008.00	3,294.73	22,400.40	9,024.00	13,376.40	47,100.00
56500 · Taxes - Federal	0.00	1,500.00	-1,500.00	0.00	1,500.00	-1,500.00	1,500.00

Dem cy Alliance
Profit & Loss Budget Performance
March 2014

	Mar 14	Budget	\$ Over Budget	Jan - Mar 14	YTD Budget	\$ Over Budget	Annual Budget
56600 · Taxes - State	1,702.00	1,500.00	202.00	4,420.00	1,500.00	2,920.00	1,500.00
56700 · Telecommunications	4,736.57	5,758.00	-1,021.43	10,136.88	17,274.00	-7,137.12	69,100.00
56800 · Travel	20,536.61	14,850.00	5,686.61	48,852.25	44,550.00	4,302.25	279,700.00
56900 · Prior Year Expenses	607.70		607.70	9,709.57		9,709.57	
Total 55000 · Operations	82,070.03	80,325.00	1,745.03	197,547.42	202,975.00	-5,427.58	858,869.00
67500 · Contingency	0.00	3,264.00	-3,264.00	0.00	9,792.00	-9,792.00	48,008.00
Total 50010 · Expenses	336,112.68	347,035.50	-10,922.82	911,181.84	1,003,139.50	-91,957.66	4,931,025.00
Total Expense	336,112.68	347,035.50	-10,922.82	911,181.84	1,003,139.50	-91,957.66	4,931,025.00
Net Income	-80,470.31	293,172.50	-373,642.81	1,570,671.59	1,567,484.50	3,187.09	0.00

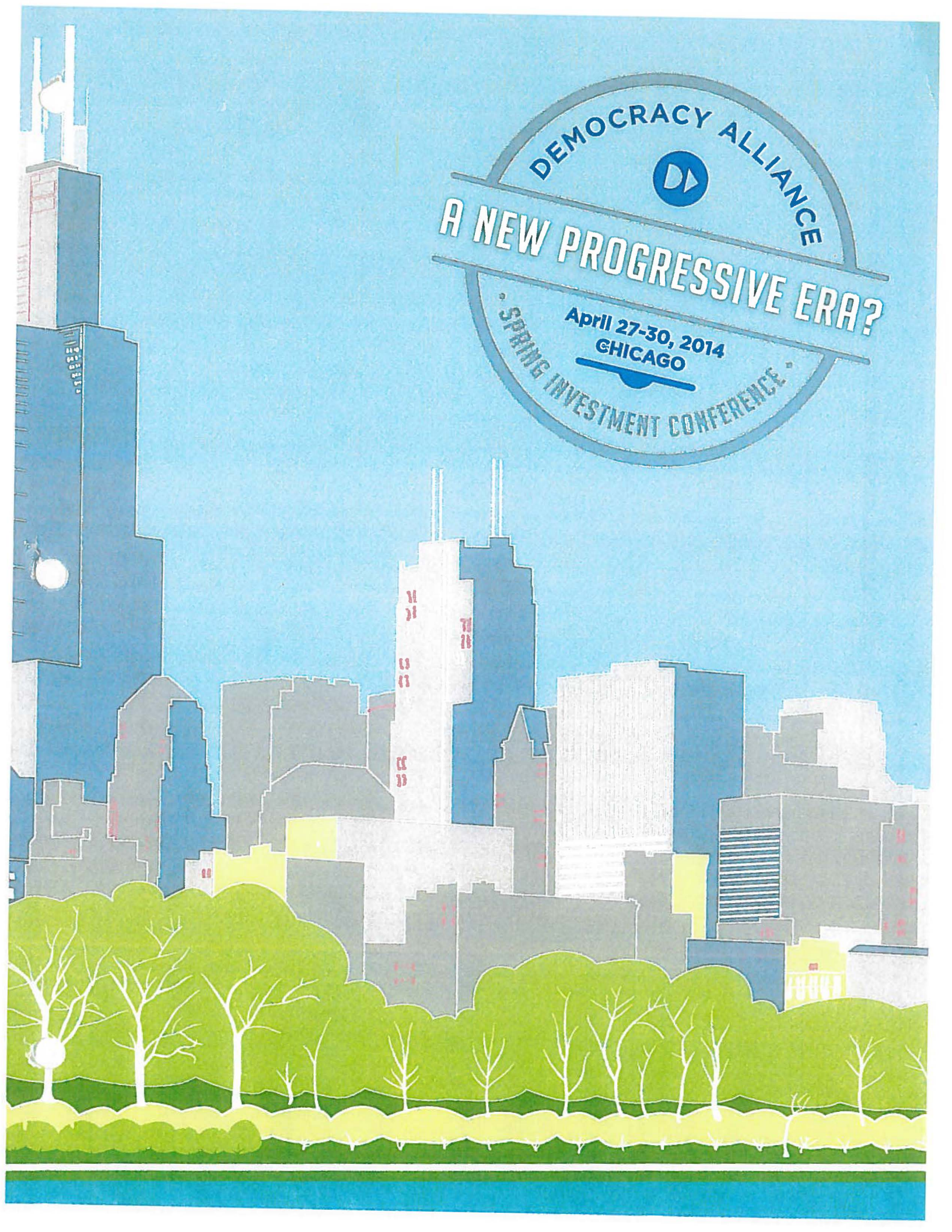


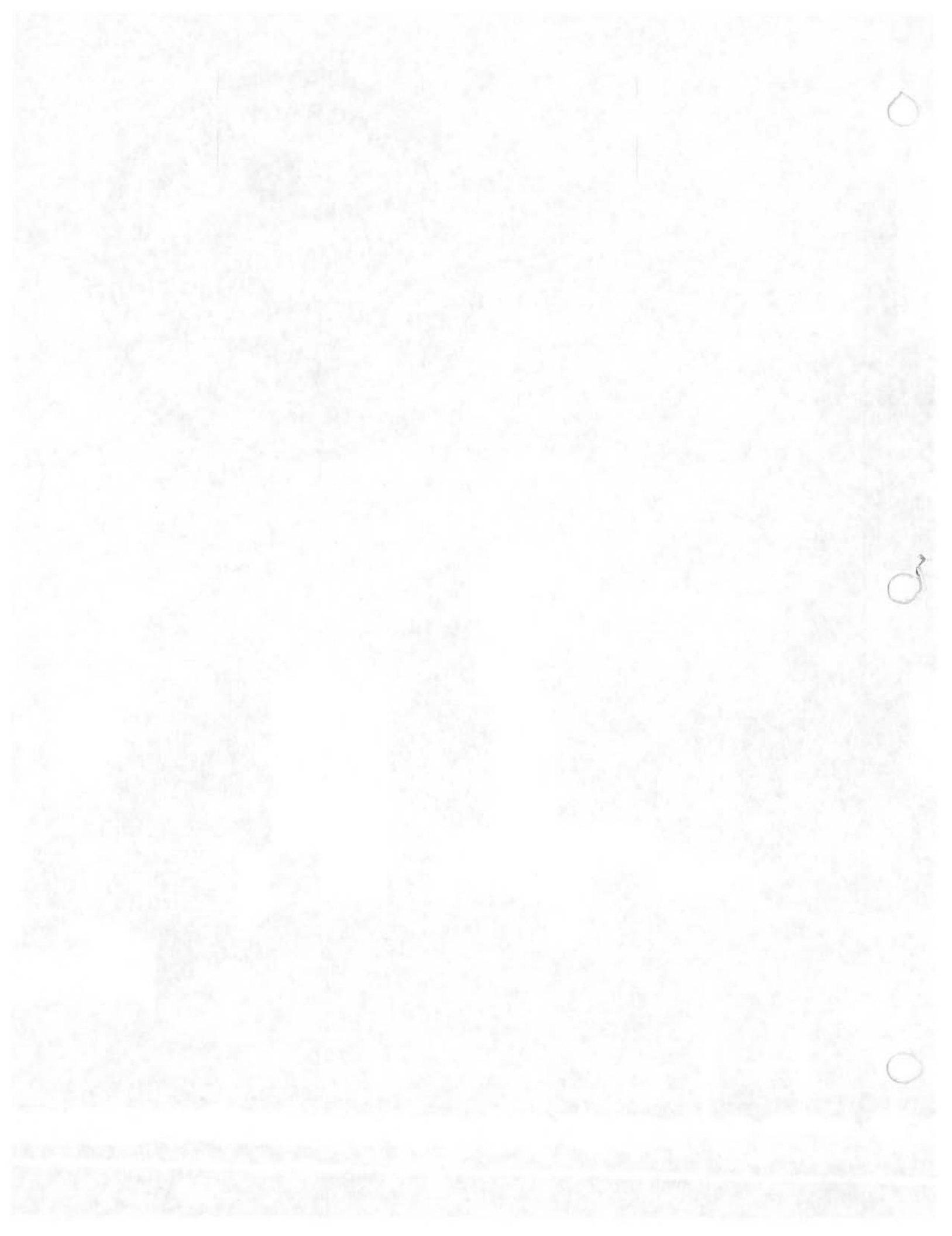
DEMOCRACY ALLIANCE

A NEW PROGRESSIVE ERA?

April 27-30, 2014
CHICAGO

SPRING INVESTMENT CONFERENCE





Conference Participation Guidelines

The Democracy Alliance strives to create a safe place for progressive funders and movement leaders to meet and discuss issues of common interest, develop relationships through dialogue and networking, and engage in conversations about progressive strategies.

One of the primary purposes of this conference is to generate support for Alliance Partner Organizations and engage in diverging perspectives connected to shaping political and policy transformation in America. In order to create a comfortable environment for everyone, we politely request that attendees not solicit one another for projects outside the Alliance's purview at Alliance events.

Furthermore, Democracy Alliance conference participants have an expectation that their conference experience and their identity shall remain confidential. In order to keep faith with that expectation, we ask all Partners and guests to:

- Respect the privacy of others and not share Partners' names or details of the conference with the press or post to personal social media channels including, but not limited to Facebook, Twitter, YouTube, Tumblr, Instagram, or on any blog.
- Contact Ryan Rodriguez at (202) 689-4425 or rrodriguez@democracyalliance.org if you are contacted by the media or a blogger about the conference.
- Refrain from leaving sensitive materials out where others may find them. We ask that all attendees dispose of unwanted conference materials in specially identified recycling bins.

A NOTE FOR FOUNDATION REPRESENTATIVES

Foundation Representatives should review the agenda and decide whether there are any sessions which they believe would not be appropriate for them to attend, or prefer to attend in their personal capacities. Democracy Alliance staff and counsel are available to discuss any questions about the content of the sessions.



April 27, 2014

Welcome to Chicago!

We're glad you are with us for three days where we can reconnect, recharge, and renew our efforts to build a more enduring progressive future.

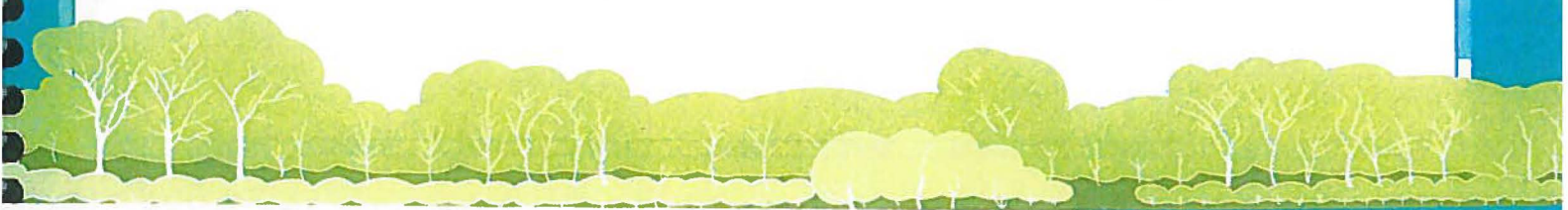
The DA plays several valuable roles in the progressive community, but one of them, which the conference embodies, is as a place for leaders to come together, form and renew relationships, and plan for action. Donors and movement leaders, labor and "capital," progressive foundations and political leaders — nowhere do these communities connect and work together as they do in the Democracy Alliance.

We've planned an exciting program with a mix of internal strategy and reflection, panels on social movements and economic justice, and briefings and action plans for the political challenges we face in 2014 and beyond.

We look forward to work and fun together in the next few days.

Rob McKay
Board Chair

Gara LaMarche
President





CONFERENCE OVERVIEW

SUNDAY, APRIL 27

- 10:15 a.m. - 12:00 p.m. Optional: Private Tour of the Art Institute of Chicago (Shuttle departs from Lower Lobby at 10:15 a.m.) [Off-site]
- 3:00 p.m. Registration & Information Desk Opens and "Unconference" Sign-Ups Begin [Promenade]
- 3:00 p.m. Partner Resource Room Opens [Trianon B]
- 5:00 - 6:30 p.m. Welcome Cocktails and Introduction of New Partners (Partners Only) [Promenade]
- 6:30 - 8:30 p.m. Dinner with New York City Mayor Bill de Blasio (Partners Only) [Ballroom]
- 8:30 - 11:00 p.m. Partner Wine Party (Partners Only) [Presidential Suite Room #2510]

MONDAY, APRIL 28

- 8:00 a.m. Registration & Information Desk Opens and "Unconference" Sign-Ups Continue [Promenade]
- 8:00 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 8:00 a.m. Breakfast Buffet Opens (Partners Only) [Ballroom]
- 8:30 - 11:00 a.m. DA Partner Forum & Business Session: Looking Ahead to the DA's Next Five Years (Partners Only) [Ballroom]
- 11:00 - 11:30 a.m. Break
- 11:30 a.m. Lunch Buffet Opens [Ballroom]
- 11:45 a.m. - 12:15 p.m. Opening Remarks by DA Board Chair Rob McKay [Ballroom]
- 12:15 - 1:45 p.m. How Social Movements Fuel Policy Wins: Lessons from Criminal Justice Reform [Ballroom]
- 1:45 - 2:00 p.m. Big Ideas: Economic Solutions for the 21st Century [Ballroom]
- 2:30 - 3:30 p.m. Afternoon Workshops: Advancing a Progressive Policy Agenda
Global Climate Change [Salon]
Immigration Reform [Trianon A]
Gun Violence Prevention [Glass Room]
Money-In-Politics Reform [Versailles]
- 4:00 - 5:00 p.m. "Un-Conference" Partner Organizing Time [Various]
- 5:00 - 6:00 p.m. Cocktail Reception [Promenade]
- 6:00 - 7:30 p.m. Intentions Session (Partners Only) [Concorde]
- 6:00 - 7:30 p.m. Meeting for Leaders of Aligned Network & Dynamic Investment Organizations (APOs Only) [Salon]
- 7:30 - 9:00 p.m. Dinner & Program: Remarks by Valerie Jarrett and Performance by Lizz Winstead [Ballroom]
- 9:00 - 11:00 p.m. Film Screening & Discussion: *Freedom Summer* [Salon]

CONFERENCE OVERVIEW (CONTINUED)

TUESDAY, APRIL 29

- 7:30 a.m. Registration & Information Desk Opens [Promenade]
- 7:30 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 7:30 a.m. Breakfast Buffet Opens [Ballroom and Terrace]
- 7:45 - 8:30 a.m. Partner-Organized Meet-and-Greet with U.S. Senate Candidate Alison Lundergan Grimes [Salon]
Hosted by Marcy Carsey, David desJardins, Paul Egerman, Fran Rodgers, John Stocks, and Michael Vachon
- 8:30 - 9:30 a.m. Partner-Organized Caucus Meetings
 - Putting Climate Change at the Forefront of American Politics [Versailles]
Hosted by Tom Steyer
 - Fighting Economic Inequality: A Bold Plan to End Poverty [Glass]
Hosted by Susan Sandler and Steve Phillips; Quinn Delaney; Jim and Suzanne Gollin; Mary Kay Henry, SEIU; Joanie Bronfman; Weston Milliken; and Kate and Phil Villers
- 10:00 - 10:15 a.m. Big Ideas: Economic Solutions for the 21st Century [Ballroom]
- 10:15 - 11:30 a.m. Cities: Laboratories of Progressive Innovation? [Ballroom]
- 11:45 a.m. - 12:30 p.m. Big Ideas Economic Solutions for the 21st Century Group Discussion [Versailles]
- 12:30 - 2:30 p.m. National Funders Convening Lunch: 2014 and Beyond - An Election Preview [Ballroom]
- 3:00 - 4:00 p.m. National Funders Convening Workshops
 - Protecting Access to the Polls [Glass]
 - Winning Strategies on Healthcare in the States [Versailles]
- 4:30 - 5:30 p.m. National Funders Convening Workshops
 - Maintaining and Enhancing Progressive's Technical Edge [Versailles]
 - Ballot Initiatives in 2014 and Beyond [Glass]
- 5:30 - 7:45 p.m. Cocktail Reception: State Battles, State Victories - How to Win in 2014 (Funders Only) [Concorde]
- 7:45 - 9:00 p.m. Dinner with David Axelrod - Reflections on a Career in Journalism, Politics, and the Obama Journey [Ballroom]
- 9:00 - 11:30 p.m. Late-Night Networking [Lobby Bar]

WEDNESDAY, APRIL 30

- 8:00 a.m. Registration and Information Desk Opens [Promenade]
- 8:00 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 9:00 - 9:30 a.m. Opening Remarks by Planned Parenthood Action Fund President Cecile Richards [Ballroom]
- 9:30 - 11:00 a.m. Breakfast Discussion: Spotlight on Engaging the New Majority [Ballroom]
- 11:30 a.m. - 12:30 p.m. Partner-Organized Caucus Meetings
 - Scholars Strategy Network [Glass]
Hosted by David desJardins and Bob Bowditch
 - No Shortcuts: Building Power for the Long Haul [Versailles]
Hosted by Michael Vachon and Ken Zimmerman
- 1:00 - 3:00 p.m. Optional Activity: Organizing for Action Open House (Shuttle departs from Lower Lobby at 1:00 p.m.) [Off-site]

SUNDAY, APRIL 27

SUNDAY AT-A-GLANCE

10:15 a.m. - 12:00 p.m.	Optional: Private Tour of the Art Institute of Chicago [Off-Site]
3:00 p.m.	Registration & Information Desk Opens and "Unconference" Sign-Ups Begin [Promenade]
3:00 p.m.	Partner Resource Room Opens [Trianon B]
5:00 - 6:30 p.m.	Welcome Cocktails and Introduction of New Partners (Partners Only) [Promenade]
6:30 - 8:30 p.m.	Dinner with New York Mayor Bill de Blasio (Partners Only) [Ballroom]
8:30 - 11:00 p.m.	Partner Wine Party (Partners Only) [Presidential Suite, Room #2510]

SUNDAY DETAILS

- 10:15 a.m. - 12:00 p.m.** **Optional Activity: Private Tour of the Art Institute of Chicago**
Partners arriving early are invited to a curator-led tour of the renowned Art Institute of Chicago, home of more than 300,000 works of art including Grant Wood's *American Gothic*, Jackson Pollock's *Greyed Rainbow*, and Georges Seurat's *A Sunday on La Grande Jatte*. A shuttle will depart from the lower lobby at 10:15 a.m.; the tour will begin at 10:30 a.m.
- 3:00 p.m.** **Conference Registration & Information Desk Opens [Promenade]**
- 3:00 p.m.** **Partner Resource Room Opens [Trianon B]**
- 3:00 p.m.** **"Unconference" Sign-Ups Begin [Promenade]**
Democracy Alliance conferences are unique opportunities for Partners to self-organize around topics of shared interest. This conference features the DA's first-ever "Unconference," an opportunity for Partners to host impromptu discussions on a variety of topics. To sign up to host your own "unconference" discussion, visit the Registration & Information Desk.
- 5:00 - 6:30 p.m.** **Welcome Cocktails (Partners Only) [Ballroom]**
Partners are invited to join Board Chair Rob McKay and Membership Committee Chair Jim Gollin for a special reception welcoming new Partners.



SUNDAY, APRIL 27 (CONTINUED)

6:30 - 8:30 p.m.

Dinner with New York Mayor Bill de Blasio (Partners Only) [Ballroom]



Katrina vanden Heuvel

**DINNER WITH NEW YORK
MAYOR BILL DE BLASIO**

Over dinner, *The Nation* Editor and Publisher Katrina vanden Heuvel will lead a wide-ranging discussion with New York City Mayor Bill de Blasio about lessons we can learn from New York's path to social and economic equality.



Bill de Blasio

8:30 p.m. - 11:30 p.m.

Partner Wine Party (Partners Only) [Presidential Suite, Room #2510]

Hosted by Rob McKay, David Friedman, and Joe Zimlich

Join fellow DA Partners for a glass of wine and late-night snacks, including vino from wineries owned by DA partners in the Ritz-Carlton's presidential suite, offering stunning views of the Chicago skyline.



MONDAY AT-A-GLANCE

8:00 a.m.	Registration and Information Desk Opens [Promenade]
8:00 a.m.	Partner Resource Center Opens (Partners Only) [Trianon B]
8:00 a.m.	Breakfast Buffet Opens (Partners Only) [Ballroom]
8:30 - 11:00 a.m.	DA Partner Forum & Business Session: Looking Ahead to the DA's Next Five Years (Partners Only) [Ballroom]
11:00 a.m. - 11:30 a.m.	Break
11:30 a.m.	Lunch Buffet Opens [Ballroom]
11:45 a.m. - 12:15 p.m.	Opening Remarks by Board Chair Rob McKay [Ballroom]
12:15 - 1:45 p.m.	How Social Movements Fuel Policy Wins: Lessons from Criminal Justice Reform [Ballroom]
1:45 - 2:00 p.m.	Big Ideas: Economic Solutions for the 21st Century [Ballroom]
2:30 - 3:30 p.m.	Afternoon Workshops: Advancing a Progressive Policy Agenda Global Climate Change [Salon] Immigration Reform [Trianon A] Gun Violence Prevention [Glass Room] Money-in-Politics Reform [Versailles]
4:00 - 5:00 p.m.	"Unconference" Partner Organizing Time [Various]
5:00 - 6:00 p.m.	Cocktail Reception [Promenade]
6:00 - 7:30 p.m.	Intentions Session (Partners Only) [Concorde]
6:00 - 7:30 p.m.	Meeting for Leaders of Aligned Network & Dynamic Investment Organizations (APOs Only) [Salon]
7:30 - 9:00 p.m.	Dinner & Program: Remarks by Valerie Jarrett and Performance by Lizz Winstead [Ballroom]
9:00 - 11:00 p.m.	Film Screening & Discussion: <i>Freedom Summer</i> [Salon]

MONDAY DETAILS

8:00 a.m.	Registration and Information Desk Opens [Promenade]
8:00 a.m.	Partner Resource Room Opens [Trianon B]
8:00 a.m.	Breakfast Buffet Opens [Ballroom]
8:30 - 11:00 a.m.	DA Partner Forum and Business Session: Looking Ahead to the DA's Next Five Years (Partners Only) Over the past nine years, the DA and its Partners have been instrumental in building a strong, sustainable progressive movement. Now, as we prepare ourselves to face our next set of challenges, with so much at stake for the nation and the progressive agenda we seek to advance. DA Board Chair Rob McKay and DA President Gara LaMarche will kick off a Partner discussion—to continue in regional gatherings in the coming months—of where the DA might go in the next five years and what it will take to get there.
11:00 - 11:30 a.m.	Break
11:30 a.m.	Lunch Buffet Opens [Ballroom]

MONDAY, APRIL 28 (CONTINUED)

11:45 a.m. - 12:15 p.m.

Opening Remarks [Ballroom]

Democracy Board Chair **Rob McKay** will welcome leaders of Aligned Network and Dynamic Investment Organizations to the conference and take a moment to reflect on the remarkable contributions made by former DA Partner **Peter Lewis** on the DA and the broader progressive movement.

12:15 -1:45 p.m.

Lunch Discussion: How Social Movements and Smart Alliances Fuel Policy Wins: Lessons from Criminal Justice Reform [Ballroom]

Sentencing and drug policy reforms, rollback of the death penalty, curbs on stop and frisk practices - these recent gains for the criminal justice reform movement seemed far from achievable only a few years ago. Together with **ACLU Deputy Legal Director Vanita Gupta**, **Drug Policy Alliance Founder Ethan Nadelmann**, **Center for Community Change Campaign for Community Values Director Gabe Gonzalez** and Distinguished Lecturer at John Jay College and Former Program Director of the **Criminal Justice Institute at The Open Society Institute Tanya Coke**, we'll explore how these victories - with much more still to do - were possible, and learn what we can apply to other campaigns.

1:45 - 2:00 p.m.

Big Ideas: Economic Solutions for the 21st Century [Ballroom]

Progressives have been effective in defining our economy's problems—low to moderate growth, skyrocketing inequality, and high unemployment. We have also developed effective frameworks and are leading campaigns for concrete policy solutions. Yet, the problems that plague our 21st century economy are going to require a more comprehensive set of solutions—bold new ideas that promote growth and stability, reduce inequality, and give particular attention to the factors that create disproportionate rates of financial instability among women, people of color, and the working poor. In our first two Big Idea presentations, two top economic voices, **AFL-CIO President Richard Trumka** and **Demos President Heather McGhee** will offer their thoughts on what it will take to build a 21st Century economy that works for all.

2:30 - 3:30 p.m.

Afternoon Policy Strategy Workshops

In small-group workshops, attendees will have the opportunity to roll up their sleeves and engage in a facilitated discussion, exploring how the lessons brought forth in the plenary can be applied to the policy battles of today and tomorrow including climate change, immigration reform, gun violence prevention, and money in politics reform. In each session, we will be joined by several movement leaders who will be on hand to lend their expertise and insight and to help us develop strategic paths to victory on each of these critical policy issues.

Breakout 1: Immigration Reform [Salon]

Facilitator: **Mary Kay Henry, DA Board Member and SEIU International President**

Respondents: **Frank Sharry, America's Voice Executive Director**

Angela Kelley, Center for American Progress Vice President for Immigration Policy

Deepak Bhargava, Center for Community Change Executive Director

Breakout 2: Gun Violence Prevention [Glass Room]

Facilitator: **Brina Millikowsky, DA Partner**

Respondents: **Shannon Watts, Moms Demand Action Founder**

Zach Silk, Political Strategist

Josh Horwitz, Coalition to Stop Gun Violence Executive Director

2:30 - 3:30 p.m.

Afternoon Policy Strategy Workshops (continued)

Breakout 3: Global Climate Change [Salon]

Facilitator: Kathleen Welch, DA Partner

**Respondents: Gene Karpinski, League of Conservation Voters President
Ivan Frishberg, Organizing for America Climate Director
Becky Bond, CREDO Mobile Political Director**

Breakout 4: Money-In-Politics Reform [Versailles]

Facilitator: Jonathan Soros, DA Partner

**Respondents: David Donnelly, Public Campaign Executive Director
Nick Penniman, Fund for the Republic Executive Director
Heather McGhee, Demos President
Michael Waldman, Brennan Center for Justice President**

4:00 - 5:00 p.m.

"Unconference" Partner Organizing Time

Since the conference began, Partners have had the opportunity to sign up to informally organize "Unconference" conversations on the topics of their choosing. The schedule of discussions is available at the Registration & Information Desk.

5:00 - 6:00 p.m.

Cocktail Reception

Over cocktails, DA Board Member Ted Trimpa will recognize new and departing leaders of DA-recommended organizations - including Tracy Sturdivant who is transitioning from her role as State Voices' Executive Director later this spring, Governor Ted Strickland who is now the President of the Center for American Progress Action Fund, Arshad Hasan who recently took the reigns as ProgressNow's new Executive Director, and Denise Cardinal, the immediate past Executive Director of ProgressNow.

6:00 - 7:30 p.m.

Intentions Session (Partners Only) [Concorde]

DA Board Chair Rob McKay will update Partners on the 2012-2014 DA Portfolio. DA Partners will then meet to signal their support for DA-recommended organizations and efforts.

6:00 - 7:30 p.m.

Special Meeting for Leaders of Aligned Network & Dynamic Investment Organizations (APOs Only) [Salon]

Leaders of Aligned Network and Dynamic Investment organizations are invited to join Democracy Alliance Managing Director Julie Kohler for a discussion about the DA's ongoing investment strategy update process.

MONDAY, APRIL 28 (CONTINUED)

7:30 - 9:00 p.m.

Dinner & Program: Remarks by Valerie Jarrett and Performance by Lizz Winstead [Ballroom]

DINNER & PROGRAM:

REMARKS BY

VALERIE JARRETT &

PERFORMANCE BY **LIZZ WINSTEAD**

We will first get an update from Senior Advisor to President Barack Obama **Valerie Jarrett** about the President's agenda in the final two years of his Administration and the important role that independent organizations will play in helping to promote the longer-term progressive change that we seek to achieve.

Then, **Lizz Winstead**, Co-Creator of The Daily Show, Co-Founder of Air America Radio, and comedic genius, will join us for a light-hearted look at the conservative Right and the decay of the Fourth Estate. We will also pause to toast **Media Matters for America** on celebrating its 10th anniversary and the impact it has had in holding the Right accountable for its actions.



Valerie Jarrett



Lizz Winstead

9:00 - 11:00 p.m.

Documentary Screening: *Freedom Summer* [Salon]

In 1964, despite the efforts of local activists, Mississippi remained virulently committed to segregation, underscored by the systematic exclusion of African Americans from the political process. In response, Robert Moses of the Student Nonviolent Coordinating Committee developed a campaign to bring a thousand volunteers—primarily enthusiastic young white supporters—to state to encourage necessary reforms. Join Firelight Media President and filmmaker **Marcla Smith** for a special preview of *Freedom Summer*, a documentary capturing this important moment in our past.

TUESDAY, APRIL 29

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TUESDAY AT-A-GLANCE

- 7:30 a.m. Registration and Information Desk Opens [Promenade]
- 7:30 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 7:30 a.m. Breakfast Buffet Opens [Ballroom and Terrace]
- 7:45 - 8:30 a.m. Partner Organized Meet-and-Greet with U.S. Senate Candidate Allison Lundergan Grimes
Hosted by Marcy Carsey, David desJardins, Paul Eggerman, Fran Rodgers, John Stocks, and Michael Vachon
- 8:30 - 9:30 a.m. Partner-Organized Caucus Meetings
- 10:00 - 10:15 a.m. Big Ideas: Economic Solutions for the 21st Century [Ballroom]
- 10:15 - 11:30 a.m. Cities: Laboratories of Progressive Innovation? [Ballroom]
- 11:45 a.m. - 12:30 p.m. Big Ideas Economic Solutions for the 21st Century Group Discussion [Versailles]
- 12:30 - 2:30 p.m. National Funders Convening Lunch: 2014 and Beyond - An Election Preview [Ballroom]
- 3:00 - 4:00 p.m. National Funders Convening Workshops
- 4:30 - 5:30 p.m. National Funders Convening Workshops
- 5:30 - 7:45 p.m. Cocktail Reception: State Battles, State Victories - How to Win in 2014 (Funders Only) [Concorde]
- 7:45 - 9:00 p.m. Dinner with David Axelrod - Reflections on a Career in Journalism, Politics, and the Obama Journey [Ballroom]
- 9:00 - 11:30 p.m. Late-Night Networking [Lobby Bar]

TUESDAY DETAILS

- 7:30 a.m. Registration and Information Desk Opens [Promenade]
- 7:30 a.m. Partner Resource Room Opens [Trianon B]
- 7:30 a.m. Breakfast Buffets Opens
Partners are invited to enjoy their breakfast in the ballroom or in one of two Partner-Organized Caucus Meetings. Breakfast buffets are located in the ballroom and outside the caucus meeting rooms.
- 7:45 - 8:30 a.m. Partner Organized Meet-and-Greet with U.S. Senate Candidate Allison Lundergan Grimes [Salon]
Hosted by Marcy Carsey, David desJardins, Paul Eggerman, Fran Rodgers, John Stocks, and Michael Vachon

TUESDAY, APRIL 29 (CONTINUED)

8:30 - 9:30 a.m.

Partner-Organized Caucus Meetings

Putting Climate Change at the Forefront of American Politics [Versailles]

Hosted by Tom Steyer

NextGen Climate head strategist **Chris Lehane** will discuss their political plan to force climate change to be a top political issue.

Fighting Economic Inequality: A Bold Plan to End Poverty [Glass]

Hosted by Susan Sandler and Steve Phillips; Quinn Delaney; Jim and Suzanne Gollin; Mary Kay Henry, SEIU; Joanie Bronfman; Weston Milliken; and Phil and Kate Villers

Poverty is not inevitable. It is not a fact of nature—it is structural, created by policies and practices, by human decisions that benefit some people at excruciating cost to others. The good news is that low-wage workers and communities throughout the country are building a movement with bold demands that are shaping an alternative. Join us for a discussion about developing strategies for change. Can a labor market strategy to create good jobs, increase wages, and improve working conditions be the main driver of a strategy to combat inequality in this country. **Center for Community Change Executive Director Deepak Bhargava** will be joined by **SEIU International President Mary Kay Henry** and **Columbia University Associate Professor Dorian Warren** to explore how to fight poverty here in the world's wealthiest nation.

10:00 - 10:15 a.m.

Big Ideas: Economic Solutions for the 21st Century [Ballroom]

In this second series of Big Idea talks, we will hear economic solutions proposed by two more of our country's leading economic voices, **Center for American Progress President Neera Tanden**, and **Restaurant Opportunities Centers United Co-Founder and Co-Director Saru Jayaraman**.

10:15 - 11:30 a.m.

Cities: Laboratories of Progressive Innovation [Ballroom]

What is the potential for cities to serve as "living laboratories" for a more comprehensive progressive change agenda? How can we—through partnerships between progressive community organizations and elected leaders—develop effective models that can be taken to scale at the state and national levels? And how do we innovate while addressing the tremendous challenges faced by cities across the nation, such as rising pension costs and revitalization gaps? **Andrea Batista Schlesinger** of the **Open Society Foundations** will lead a discussion with **Tallahassee City Commissioner and Mayoral candidate Andrew Gillum**, **New York's Working Families Party Executive Director Dan Cantor**, and **LAANE Executive Director Roxana Tynan**.

11:45 a.m. - 12:30 p.m.

"Big Ideas" Group Discussion: Economic Solutions for the 21st Century [Versailles]

BIG IDEAS GROUP DISCUSSION:

ECONOMIC SOLUTIONS FOR THE 21ST CENTURY

Join our four "Big Ideas" speakers - **Neera Tanden**, **Heather McGhee**, **Richard Trumka**, **Saru Jayaraman**, and **DA Managing Director Julie Kohler** - for an interactive dialogue on what it will take to build a 21st century economy that works for all.



Neera Tanden



Heather McGhee



Richard Trumka



Saru Jayaraman



Julie Kohler

NATIONAL FUNDERS CONVENING

Beginning with lunch, we will be joined by a number of additional progressive political funders and movement leaders that are leading the fight to build progressive power this November and beyond for a series of focused conversations on the current political moment.

12:30 - 1:00 p.m.

Lunch Buffet Opens [Ballroom]

1:00 - 2:30 p.m.

Lunch Discussion: 2014 and Beyond - An Election Overview [Ballroom]

After stunning victories in 2008, progressives stayed home in 2010 and Tea Party candidates prevailed. The result has plagued the nation ever since, resulting in an assault on women's rights, higher taxes for low-income people, attacks on our environment, and more. Progressives must win key state and federal races in 2014 to stop this tide of harmful public policy and set the stage for 2016 and upcoming redistricting battles. This discussion is intended to be a primer on the midterm elections and preview strategies for persuading and turning out a winning majority in November.

We will be joined by:

- > Rising star and U.S. Senate candidate **Alison Lundergan Grimes**, who will give remarks about her bid to unseat Senate Majority Leader Mitch McConnell and help Democrats retain the U.S. Senate;
- > **Catalist** CEO **Laura Quinn**, who will give us a data-driven lay-of-the-land, analyzing recent election results and outlining the challenges and opportunities we face this cycle;
- > White House Political Director **David Simas**, who will share what the White House is doing to ensure that Affordable Care Act is successful - and an achievement progressives can tout on the campaign trail;
- > and Democracy Alliance President **Gara LaMarche**, who will preview the Democracy Alliance's strategy for engaging in this election, including going deep into states and maintaining a strong focus on engaging and mobilizing key progressive constituencies.



Alison Lundergan
Grimes

Laura Quinn

David Simas

Gara LaMarche

TUESDAY, APRIL 29 (CONTINUED)

3:00 - 4:00 p.m.

National Funders Convening Workshops - Round 1

Following our 2014 election overview, attendees will have the opportunity to participate in two additional small-group workshops, designed to engage Partners in deep discussions on several of the short- and long-term strategies that we must pursue in order to see victories in November and beyond. We will again be joined by a number of movement experts who will be on hand to share their perspectives on the opportunities and challenges that we'll face from a resurgent Right in the midterms and in the long-term.

Workshop 1: Protecting Access to the Polls [Glass]

Facilitator: Patricia Bauman, DA Partner

**Respondents: Mark Ritchie, Minnesota Secretary of State
Judith Browne Dianis, Advancement Project Co-Director**

Workshop 2: Winning Strategies on Healthcare in the States [Versailles]

Facilitator: Raj Goyle, Former Kansas State Representative

**Respondents: Larry Grisolano, Former Obama for America Senior Strategist
David Simas, Assistant to the President and Deputy Senior Advisor for Communications and Strategy, The White House**

4:30 - 5:30 p.m.

National Funders Convening Workshops - Round 2

Workshop 3: Ballot Initiatives In 2014 and Beyond [Glass]

Facilitator: Cristina Uribe, DA Partner

Respondent: Justine Sarver, Ballot Initiatives Strategy Center Executive Director

Workshop 4: Maintaining and Enhancing Progressives' Technical Edge [Versailles]

Facilitator: Paul Rudd, DA Partner

**Respondents: Christle George, New Media Ventures Director
Laura Quinn, Catalyst Chief Executive Officer
Ethan Roeder, New Organizing Institute Executive Director
Ian Inaba, Citizen Engagement Lab Executive Director**

5:30 - 7:45 p.m.

Cocktail Reception: State Battles, State Victories - How to Win in 2014 (Funders Only)

Please join other attendees for cocktails at this reception themed around how progressives can win in the states in 2014 and beyond. At 6:00 p.m., we'll be joined by Democratic National Committee Chair **Debbie Wasserman Schultz** for an update on what the DNC is doing to prepare for November and lay the groundwork for 2016. Then, at 6:30 p.m., in a special program organized in partnership with Committee on States, DA Partner **Anne Bartley** and DA Board Member **John Stocks** will update us on electoral efforts in key states nationwide.

7:45 - 9:00 p.m.

Dinner with David Axelrod - Reflections on a Career in Journalism, Politics, and the Obama Journey [Ballroom]

Over dinner, we will be joined by **David Axelrod**, a 35-year veteran of American politics and journalism and Chicago native. In a wide-ranging discussion led by DA Partner **Paul Harstad**, David will discuss his work with more than 150 local, state, and national campaigns, and his work helping elect two Democratic presidents.

9:00 p.m. - 12:00 a.m.

Late-Night Networking [Lobby Bar]

WEDNESDAY, APRIL 30

WEDNESDAY AT-A-GLANCE

- 8:00 a.m. Registration and Information Desk Opens [Promenade]
- 8:00 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 9:00 - 9:30 a.m. Opening Remarks by Planned Parenthood President Cecile Richards [Ballroom]
- 9:30 - 11:00 a.m. Breakfast Discussion: Spotlight on Engaging the New Majority [Ballroom]
- 11:30 a.m. - 12:30 p.m. Partner-Organized Caucus Meetings
- 1:00 - 3:00 p.m. Optional Activity: Organizing for Action Open House [Off-Site]

WEDNESDAY DETAILS

- 8:00 a.m. Registration and Information Desk Opens [Promenade]
- 8:00 a.m. Breakfast Buffet Opens
- 8:00 a.m. Partner Resource Room Opens [Trianon B]
- 9:00 - 9:30 a.m. Remarks by Planned Parenthood Action Fund President Cecile Richards [Ballroom]

**REMARKS BY
PLANNED PARENTHOOD ACTION FUND
PRESIDENT
CECILE RICHARDS**

Women voters - particularly single women and women of color - made the difference in races up and down the ballot in 2012 and turned out strongly for now-Governor Terry McAuliffe and other candidates in the 2013 Virginia election. Planned Parenthood Action Fund President Cecile Richards will talk about her organization's success in mobilizing women in elections and issue advocacy campaigns, highlight the central role that women and voters of color are playing in ever progressive victory across the country, and discuss the implications of this profound electoral shift for our progressive policy agenda going forward.



Cecile Richards

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WEDNESDAY, APRIL 30 (CONTINUED)

9:30 - 11:00 a.m.

Breakfast Discussion: Spotlight on Engaging the New Majority [Ballroom]

Throughout the National Funders Convening, attendees have heard the political challenges progressives face this year and different strategies that promise the greatest impact. This last session will dive deeply into one of the most important pieces of that discussion: how to engage and mobilize the Rising American Electorate (RAE) for victory in 2014 and organize a New Majority to advance our agenda in 2016 and beyond.

The **Black Civic Engagement Fund**, the **Latino Engagement Fund**, the **Women's Equality Center**, and the **Youth Engagement Fund** have engaged millions of Americans in elections and issue-advocacy efforts. **SEIU** Political Director **Brandon Davis** will lead a discussion with **Dream Defenders** Executive Director **Phillip Agnew**, **ColorofChange** Executive Director **Rashad Robinson**, **Workers Defense Project** Executive Director **Cristina Tzintzún**, and **Nevada Assemblywoman Lucy Flores**. Together, these leaders will share their perspectives on how the Funds' collective investments have already had an impact in their states, highlighting the organizing and power-building efforts the Funds are supporting and the difference that mobilized RAE votes have had on election and policy outcomes. Join a dynamic conversation about the national implications of a mobilized and solidly progressive RAE and how funders can further support this work.

11:30 a.m. - 12:30 p.m.

Partner-Organized Caucuses

Scholars Strategy Network [Glass Room]

Hosted by David desJardins and Bob Bowditch

The **Scholars Strategy Network (SSN)** is a fast-growing group organizing America's leading scholars to address public policy issues. It was founded by DA Partner **Bob Bowditch** and DA Board Member **David desJardins** and Harvard University Professor **Theda Skocpol** in 2009, and has grown to over 400 members at 117 universities and includes 19 regional networks across the country. Members prepare and publish short, vivid briefs highlighting their research findings and relevance to policy issues, and engage with policymakers, journalists, bloggers, activists, and advocacy groups. Professor Skocpol will describe the impact that SSN is having, and its growth plan to do even more.

No Shortcuts: Building Power for the Long Haul [Versailles]

Hosted by Michael Vachon and Ken Zimmerman

Over the last 15 years, a coalition of unions, community-based organizations, and activists have built a powerful progressive infrastructure in New York State. The emergence of the **Working Families Party** as what the *New York Times* has called the "preeminent force in New York politics," the 2010 election of Attorney General **Eric Schneiderman**, "the man the banks fear most," according to the *American Prospect*, and a clean sweep by progressive candidates in last year's mayoral election, are the products of years spent planning, organizing, and executing effective campaigns. This session will discuss how progressive leaders in New York built and sustained the necessary coalitions and how success in the Empire State can be a model for other states, effectively reviving the idea that it is possible to be both independent and relevant.

1:00 p.m.

Buses Depart for Organizing for Action Open House [Lobby]

1:00 - 3:00 p.m.

Organizing for Action Open House

Join **Organizing for Action (OFA)** at an open house at their Chicago headquarters. Since its formation in January 2013, more than four million people have taken action through OFA's grassroots efforts to make their voices heard and press forward on the crucial issues that Americans voted on in 2012. Through joint efforts with partner organizations and the dedication of OFA's diverse grassroots army, OFA focuses on an array of issues including gun violence prevention, comprehensive immigration reform, the budget and the economy, climate change, healthcare, women's rights, and marriage equality - among others - as well as investing and growing the next generation of organizers.

Transportation will be provided from the Ritz-Carlton to the open house and then on to O'Hare Airport. A shuttle will depart from the lower lobby of the Ritz Carlton at 1:00 p.m.

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Alexandra Acker-Lyons Director, DA Youth Engagement Fund



Alexandra Acker-Lyons is the Director of the Youth Engagement Fund at the Democracy Alliance. She is author of the book, *The Political Ladder: Insider Tips on Getting a Job in Politics*, and is a recognized political analyst on cable news. Alexandra also consults for Share Our Strength and the National Democratic Institute. Alexandra's expertise in youth politics culminated during the 2008 election cycle, when she served as Executive Director of the Young Democrats of America. She was also the National Youth Outreach Director for John Kerry's presidential campaign. Alexandra previously served as the Executive Director at Democratic GAIN and has also worked for the Lawyers' Committee for Civil Rights, Planned Parenthood Federation of America, the Democratic Congressional Campaign Committee, and Congresswoman Nita M. Lowey (D-NY). Alexandra graduated magna cum laude from the State University of New York at Binghamton and lives in MountainView, CA.

Bradley Beychok President, Media Matters for America



Bradley Beychok is the President of Media Matters for America. He joined Media Matters as an executive vice president in 2012 from American Bridge 21st Century. Beychok served as campaign

director for the group, which was known for its tracking, research and ad campaigns across several competitive races during the 2012 cycle. Beychok is a veteran of several Democratic Senate, and House campaigns as well.

Deepak Bhargava Executive Director, Center for Community Change



Deepak Bhargava is Executive Director of the Center for Community Change, a national non-profit organization whose mission is to develop the power and capacity of low-income people, especially low-income people of color, to change the policies and institutions that affect their lives. Bhargava is also the executive director of the Center's 501(c)(4) sister organization, the Campaign for Community Change. Under his leadership, CCC has played a leading role in campaigns to achieve universal health care coverage, improve jobs and safety net policies and advance Comprehensive Immigration Reform. Prior to his appointment as Executive Director in 2002, Bhargava served as the Center's Director of Public Policy. He currently serves on the boards of the Bauman Foundation, Discount Foundation, The Nation editorial board, the National Advisory Board for the Open Society Institute, and Democracia Ahora. Born in Bangalore, India, Bhargava immigrated to the United States when he was a child. He grew up in New York City and graduated summa cum laude from Harvard College.

David Brock Board Chair and Founder, Media Matters for America



David Brock is the founder of Media Matters for America, a progressive research and information center dedicated to comprehensively monitoring, analyzing and correcting conservative misinformation in U.S. media. In the seven years since its founding Media Matters has become the premiere progressive research and communications hub and has led successful national advertiser education campaigns that led to Lou Dobbs being dropped from CNN for his anti-immigrant rhetoric and Glenn Beck's show being dropped by Fox News. Following the 2010 elections, Brock founded American Bridge 21st Century, a new type of political operation aimed at holding Republican candidates for public office accountable through a combination of research and tracking. In the 18 months since its founding American Bridge has become the preeminent research and tracking firm garnering over \$200 million in earned media value, and providing content to Priorities USA, Majority PAC and House Majority PAC.



LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Jon Carson
Executive Director,
Organizing for Action



Jon Carson is the Executive Director of Organizing for Action. Carson served as the Director of the White House Office of Public Engagement (OPE) until January 2013. Before leading OPE, he served as the Chief of Staff at the White House Council on Environmental Quality (CEQ). Prior to joining the Administration, Carson was the National Field Director for President Barack Obama's campaign in 2008 and worked on the Obama transition team. Carson also managed Tammy Duckworth's 2006 general election campaign in Illinois' 6th Congressional District and has worked on many political campaigns over the last decade, including Al Gore's 2000 presidential campaign. Carson served in the Peace Corps in southern Honduras for two years, building water systems for rural villages. He graduated from the University of Wisconsin-Platteville with a B.S. in Civil and Environmental Engineering and received a Master's Degree in Geography from the University of California-Los Angeles.

Kate Chapek
Executive Director,
Women's Equality Center



Kate Chapek is the founder of the Women's Equality Center, an organization that fosters collaboration among partner organizations to build capacity at the national and state level in order to create a movement to increase choices and

achieve real equality victories for women across the country. Chapek served as the National Women's Vote Director for President Barack Obama's Re-election Campaign and led the campaign's efforts to engage and inform women of all demographics on the important national issues concerning women. In addition to candidate campaigns, She has extensive organizational experience that includes her work with Emily's List, America Votes, Hillary Clinton for President, Communication Workers of America, and Obama for America. Chapek is a graduate of the Annenberg School of Journalism at the University of Southern California and earned a Master's Degree in Journalism from Georgetown University. Being mom to her 3 year old daughter Sinatra is her greatest accomplishment.

Caroline Fredrickson
President,
American Constitution Society



Caroline Fredrickson has been ACS's President since 2009. She previously served as the director of the ACLU's Washington Legislative Office and as General Counsel and Legal Director of NARAL Pro-Choice America. Fredrickson was Chief of Staff to Senator Maria Cantwell and Deputy Chief of Staff to then-Senate Democratic Leader Tom Daschle. During the Clinton administration, she served as Special Assistant to the President for Legislative Affairs. Fredrickson graduated from Yale University and Columbia University School of Law, where she was a Harlan Fiske Stone scholar, served on the *Columbia Law Review* and co-founded the *Columbia Journal*

of Gender and Law. She has been widely published and appears frequently in the media on topics including labor law, anti-discrimination law and human and civil rights.

Christie George
Director, New Media Ventures



Christie George is the Director of New Media Ventures, the first national network of angel investors supporting media and tech startups that disrupt politics and catalyze progressive change. At New Media Ventures, a project of the Democracy Alliance, George has overseen the investment of over \$3 million into a portfolio of non-profits and for profits, including NationalField, Sum of Us and Upworthy. George has spent her entire career guiding think tanks, development organizations and media startups to significant growth and impact. She started her career at a venture capital firm and has spent over a decade working in media, including six years managing sales and marketing for Women Make Movies, the world's leading distributor of films by and about women. She is a co-founder and Board Member of LoudSauce, the crowdfunded media-buying platform for ideas that matter. George received her B.A. from Yale University and her MBA with distinction from the University of Oxford, where she was a Skoll Scholar in Social Entrepreneurship and graduated with the Said Prize, awarded annually to the program's top student. George was recently named a Social Citizen Ambassador by the Case Foundation.

Bob Greenstein President, Center on Budget Policy and Priorities



Bob Greenstein is the Founder and Executive Director of the Center on Budget and Policy Priorities. He is considered an

expert on the federal budget and a range of domestic policy issues. Greenstein has written numerous reports, analyses, op-ed pieces and magazine articles on budget-and poverty-related issues. He appears on national television news and public affairs programs and is frequently asked to testify on Capitol Hill. In 2008, Greenstein received both the Heinz Award for Public Policy in recognition of his work to "improve the economic outlook of many of America's poorer citizens," and the John W. Gardner Award from Independent Sector for playing "a defining role in how people think about critical budget and tax policies." In 1996, Greenstein was awarded a MacArthur Fellowship. The MacArthur Foundation cited Greenstein for making "the Center a model for non-partisan research and policy organization." In 1994, President Clinton appointed him to serve on the Bipartisan Commission on Entitlement and Tax Reform. Prior to founding the Center, Greenstein was the Administrator of the Food and Nutrition Service at the US Department of Agriculture.

Arshad Hasan Executive Director, ProgressNow



Arshad Hasan is the new Executive Director of ProgressNow. He was previously the Executive Director of Democracy for America. During

his time at DFA, he developed and directed the DFA's grassroots training programs, DFA Campaign Academy and DFA Night School before being elevated to the role of Executive Director. Prior to DFA, Arshad worked with a variety of PACs and non-profits on legislative issue campaigns, corporate accountability campaigns, grassroots fundraising and electoral campaigns. While Hasan was Executive Director of DFA, the organization doubled membership from 500k to 1M, grew the budget from \$1.7M to \$4.5M, and specialized in upset electoral victories with early backing of successful candidates like Reps Alan Grayson, Donna Edwards and Jerry McNerney.

Eddy Morales Director, DA Latino Engagement Fund



Eddy Morales brings more than ten years of senior leadership experience to the Democracy Alliance, most recently serving as the Deputy Director of Voto Latino, an organization founded by Rosario Dawson aimed at increasing Latino civic engagement. While there, he helped increase the annual operating budget and oversaw strategy and day-to-day operations. Previously, Morales was the Deputy Director of Leadership Development at the Center for Community Change, where he launched a leadership development program to recruit and nurture low-income community organizers of color into community based organizations. At the DA, Morales is the Director of the Latino Engagement Fund, a collaborative effort between individual and institutional donors designed to

strengthen high-performing Latino civic engagement organizations and increase the political power of the growing Latino population. Since 2009, Morales has been continually recognized by Washington Life Magazine as one of the most influential people under 40 in DC.

Nick Penniman Executive Director, Fund for the Republic



Nick Penniman is the Executive Director of the Fund for the Republic. He was the former executive director

of the Huffington Post Investigative Fund, which he founded with Arianna Huffington in 2009. Prior to that, Penniman launched the American News Project and served as the Washington director of the Schumann Center for Media and Democracy, where he worked closely with broadcaster Bill Moyers, who Penniman first met in 1999 when he was running the Alliance for Democracy and working on campaign finance reform. He has been the publisher of *The Washington Monthly*, executive director of TomPaine.com, associate editor of the *American Project* and editor of the *Lincoln Journal*. Penniman has served on multiple nonprofit boards and advisory boards, including the Homeless Empowerment Project, which publishes *Spare Change News*, and the Roosevelt Institution.

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Laura Quinn
Chief Executive Officer, Catalist

Laura Quinn currently manages and helped found Catalist, which provides comprehensive voter data and related data services to progressive organizations. She is also a founding partner of QRS Newmedia, Inc. which specializes in communication technology design and integration services. In 2004, Quinn and a small group of investors launched Copernicus Analytics, a data mining firm focused on providing improved donor and voter analytics to progressive political clients. Prior to these endeavors, Quinn served as a Deputy Chief of Staff for Vice President Al Gore at the White House; as Director of the Democratic Technology and Communications Committee for Democratic Majority Leader Tom Daschle in the US Senate; as Communications Director for US Senator Jay Rockefeller. Prior to her work in business and government Quinn served in a variety of senior policy and communications positions in progressive not-for-profits, political organizations and campaigns.

Ethan Roeder
Executive Director,
New Organizing Institute

Ethan Roeder is the Executive Director of the New Organizing Institute. He ran the Data department for the Obama presidential campaigns

in 2008 and 2012, pioneering the use of a large-scale data operation to support individualized, relationship-based organizing. His experience also includes local and federal political campaigns as well as pro-labor and gay rights advocacy. Roeder's work is focused on building progressive strength through the intersection of traditional organizing and technology. He has convened numerous trainings and proctored countless new data practitioners in the progressive campaign space. Roeder has also done extensive work in Election Administration including managing NOI's Voting Information Project in partnership with Pew and Google in 2009 and 2010. Roeder is an art school graduate but can't draw to save his life.

Adrienne Shropshire
Director,
Black Civic Engagement Fund

Adrienne Shropshire is the Director of the Black Civic Engagement Fund. Shropshire is a consultant with more than two decades of experience working to grow and expand organizing and civic engagement infrastructure across the country. She has served as the lead consultant to the Black Civic Engagement Fund since its inception in 2012. Shropshire has worked as a community and electoral organizer in South Los Angeles and NYC as well as in philanthropy as a foundation program officer and a collaborative fund director. Currently she is a strategy consultant and advisor to donors, civic engagement organizations, and labor unions. Shropshire's

work nationally has deepened the capacity and impact of base-building groups in communities of color and advanced collaborative spaces that foster strategic coordination among progressive organizations. Shropshire lives in NY with her family and serves on the national board of both State Voices and ColorOfChange.Org.

Erik Smith
Executive Director and Founding
Board Member,
Common Purpose Project

Erik Smith is the Executive Director & Founding Board Member of Common Purpose Project. Smith has worked for more than a decade at the intersection of politics and policy as a lead strategist and counselor to Senators, Congressmen and party committees. In 2008, Smith was a paid media advisor to the Obama-Biden presidential campaign where he designed, developed and placed television, radio and print advertising. Most recently, Smith served as the Creative Director of the Inauguration of the 44th President of the United States of America.

Greg Speed
President, America Votes

Greg Speed has served as Executive Director of America Votes since October 2007. Under Speed's leadership, America Votes coordinated over 62 million direct voter contacts in the successful

2008 election cycle. In 2004, Speed served as Communications Director for the Democratic Congressional Campaign Committee. Speed worked as Press Secretary and Legislative Assistant for House Democratic Caucus Chair Martin Frost. He directed communications for IMPAC 2000, the national Democratic redistricting project, in 2001-2002. Speed has worked on many campaigns and served as Communications Director for Communities for Quality Education where he developed innovative programs combining community involvement, issue advocacy and direct voter contact. Speed hails from Chicagoland and received a B.A. from the University of Wisconsin-Madison.

The Honorable Ted Strickland
President, Center for American Progress Action Fund



Gov. Ted Strickland (D-OH) is the President of the Center for American Progress Action Fund and Counselor to the Center for American Progress. He served six terms in Congress and became Ohio's 68th governor. Most recently, President Obama nominated Ted to be a public delegate to the 68th U.N. General Assembly. Although he led Ohio during the Great Recession, Ted worked with Republican and Democratic legislators to jumpstart the economy, prioritize Ohio's education system, and usher in new advanced energy and energy efficiency standards in Ohio. During his terms in Congress, Ted built an impressive record. He was instrumental in

expanding access to health insurance for children, ensuring that America kept its promises to our veterans, and bringing home millions in investments for roads, technology, economic development, and healthcare initiatives. Born to working-class parents in rural Ohio, Ted became the first in his family to attend college.

Tracy Sturdivant
Executive Director, State Voices



Tracy is the Executive Director of State Voices. Before joining State Voices in 2010, Tracy served as the Vice President for External Affairs at the Center for Progressive Leadership, working to provide comprehensive, long-term development for diverse leaders across the country. She has worked in philanthropy, and with a host of other organizations, overseeing critical programs such as the White House Project's signature "Vote, Run, Lead" program and the National Coalition on Black Civic Participation's Black Youth Vote! and Black Women's Roundtable. Tracy is very active in the national civic engagement community, serving on the boards of the Proteus Fund, the Ballot Initiative Strategy Center, ProgressNow Education Fund, and the Center for Progressive Leadership. A self-proclaimed foodie, she also loves to travel, and especially enjoys anything that combines both interests.

Neera Tanden
President and CEO,
Center for American Progress



Neera Tanden is the President of the Center for American Progress and Counselor to the Center for American Progress Action Fund. Most recently, Tanden served as the Chief Operating Officer for the Center, leading strategic planning of the organization and managing all operations. Tanden previously served as senior advisor for health reform at the Department of Health and Human Services, advising Secretary Kathleen Sebelius and working on President Obama's health reform team to develop and pass the Affordable Care Act. Prior to that, Tanden was the director of domestic policy for the Obama-Biden presidential campaign, where she managed all domestic policy proposals. Tanden had also served as policy director for the Hillary Clinton presidential campaign, directing all policy work and overseeing debate preparation. Tanden also served as associate director for domestic policy and senior advisor to the First Lady in the Clinton administration.



LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Gloria Totten
President, Progressive Majority

Gloria A. Totten is the President of Progressive Majority, the only national organization dedicated to

electing progressive champions at the state and local levels. Totten built Progressive Majority in 2001 and through it has developed the nation's most comprehensive progressive candidate recruitment program. Totten served as Political Director for NARAL from 1996-2001 and Executive Director for Maryland NARAL from 1993-1996. In her home state of Minnesota, Totten worked on a number of electoral and issue campaigns, as the Education Director for Pro-Choice Resources, President and Lobbyist for the Minnesota Coalition Against Sexual Assault and Media Chair for It's Time Minnesota!, a campaign to expand anti-discrimination protections to GLBT individuals under the Minnesota Human Rights Code. Totten serves as chair of the board of directors for the Ballot Initiative Strategy Center and Brave New Films and a board member for PAC+. She is an Advisory Committee Member for the Drum Major Institute Scholars Program, ProgressNow, Wellstone Action and

the Women's Information Network. Totten was named a "Rising Star of Politics" in 2002 by Campaigns & Elections magazine and was awarded the "Progressive Champion Award" by Campaign for America's Future and the "Progressive Leadership Award" by Midwest Academy in 2006.

nearly 2,000 speeches, including four State of the Union and two Inaugural Addresses. He was Special Assistant to the President for Policy Coordination from 1993-95.

Michael Waldman
President,
Brennan Center for Justice

Michael Waldman is President of the Brennan Center for Justice at NYU School of Law, a nonpartisan law and policy

institute that focuses on improving the systems of democracy and justice. Waldman is one of the nation's most prominent public interest lawyers, and is an expert on the presidency, democracy and the Constitution. The Brennan Center is a leading legal voice on election law, Constitutional law, government reform and racial justice. In 2012 it helped lead the successful effort to block laws that could have made it harder for 5 million eligible citizens to vote. Waldman was Director of Speechwriting for President Bill Clinton from 1995-99, serving as Assistant to the President. He was responsible for writing or editing

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SPECIAL GUESTS

Phillip Agnew Executive Director, Dream Defenders



Phillip Agnew first came to community activism as a student at Florida A&M University School of Business and Industry. While there he served as Student Body President, a member of the University Board of Trustees and Faculty Senate. Seven years later, in response to teen Trayvon Martin being killed, Agnew formed the Dream Defenders, which brought vigor and national attention to the Martin case from the start. Dream Defenders now has chapters on nine college campuses in Florida and highlights racial and social economic-justice issues like prison privatization, racial profiling and "zero tolerance" policies in schools

David Axelrod Director, Institute of Politics at the University of Chicago



David Axelrod is a political consultant and strategist recognized for creating a winning campaign strategy for U.S. President Barack Obama. President Obama named Axelrod as a Senior Advisor to his administration from 2009-2011 and he was a top aide to Obama's 2012 re-election campaign. Axelrod has led successful campaigns for numerous Democrats, and his client roster includes such names as Bill and Hillary Clinton. He was formerly a political writer for the *Chicago Tribune* and is the founder of AKPD Message and Media, and operated ASK Public Strategies, now called ASGK Public Strategies. Axelrod joined NBC News and MSNBC as a senior political analyst.

Andrea Batista Schlesinger Deputy Director of U.S. Programs, Open Society Foundations



Andrea Batista Schlesinger is the deputy director of U.S. Programs at the Open Society Foundations. Before joining the Foundations, Schlesinger served as special advisor to New York City Mayor Michael R. Bloomberg. She coordinated the mayor's Young Men's Initiative to improve the life outcomes of young black and Latino males. She also served as a special advisor in Bloomberg's 2009 reelection campaign, focused on his agenda in areas including higher education, immigration, and housing. For eight years, Schlesinger led the Drum Major Institute for Public Policy, a think tank founded during the civil rights movement. During her tenure, DMI became well-known for its analysis on immigration and the squeezed middle-class and its repository of effective policies to promote equity and justice. Schlesinger is the author of *The Death of Why: The Decline of Questioning and the Future of Democracy*.

Bill De Blasio Mayor, New York City



Bill De Blasio is the 109th and current mayor of New York City. From 2010 to 2013, he held the citywide office of New York City Public Advocate. He formerly served as a New York City Council member, representing the 39th District in Brooklyn. In his eight years on the City Council, Bill focused his efforts on improving public education, engaging parents, expanding affordable housing, and protecting New York's middle-class and working poor. Bill

won over \$100 million in new investments in early childhood education, and wrote landmark tenants' rights legislation to protect affordable housing and end landlord discrimination for everyday New Yorkers. In 2000, Hillary Clinton asked Bill to manage her historic campaign for the U.S. Senate. He began his career in public service as a junior staffer for New York City's first African-American mayor, David N. Dinkins, and later became an assistant for community affairs at City Hall.

Becky Bond Vice President and Political Director, CREDO Mobile



As political director, Becky helps CREDO customers and CREDO Action members fight for progressive change in Washington, D.C. and in state capitols. She is the president of CREDO SuperPAC and serves on the board of the New Organizing Institute. Becky ran CREDO's campaign to register more than one million voters in 2004 and the successful effort to defeat California's Prop 23 in 2010. She began her career here as the producer of Working Assets Radio, which aired on San Francisco's NPR affiliate KALW from 2001-2003. Before that, Becky ran a conceptual art practice in San Francisco called South to the Future. Becky uses a bicycle as everyday transportation and hasn't owned a car since 2006. She is proud of having been arrested twice during her tenure at CREDO—protesting the invasion of Iraq in 2003, and protesting the Keystone XL pipeline at the White House in 2011.

SPECIAL GUESTS

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Judith Browne Dianis Co-Director, Advancement Project



Judith Browne Dianis is a prominent civil rights litigator and staunch racial justice advocate in the areas of

voting, education, housing, and immigrants' rights. She served as counsel in several significant voting rights cases including against the state of Florida in 2000. Under her leadership, Advancement Project has been successfully ending the overuse of suspensions and arrests in school districts across the country. Dianis has authored reports on the issue including: *Opportunities Suspended and Derailed: The Schoolhouse to Jailhouse Track*, examining the undue criminalization of students by their schools. Dianis worked tirelessly to protect survivors of Hurricane Katrina filing critical litigation to protect their rights and advocated for fair treatment of immigrant workers. Dianis joined Advancement Project after serving as the Managing Attorney in the Washington, D.C. office of the NAACP Legal Defense & Educational Fund, Inc. She was named one of the "Thirty Women to Watch" by *Essence Magazine*

Dan Cantor National Director, Working Families Organization



The Working Families Organization, an independent 501 (c)(4) political organization active in 6 states and the

District of Columbia, with organizing prospects or committees in several other states. The core strategy of the WFO is to

yank and prod Democrats in a progressive direction via issue advocacy, election campaigns, candidate recruitment, and "the battle of ideas." Dan is best known for his role as the founding Executive Director of the New York Working Families Party. Launched in 1998 by a coalition of community organizations, issue activists, intellectuals, progressive elected officials and labor unions, the WFP is now, if you believe the *New York Times*, "the pre-eminent political force" in New York. His children are not so sure. In 1988, he served as Labor Desk Coordinator for Rev. Jesse Jackson's Presidential campaign. He is the author of one (thin) book, many articles, and a ridiculous number of memos.

Brandon Davis National Political Director, SEIU



Brandon L. Davis is the National Political Director for the Service Employees International Union (SEIU), the

nation's fastest growing union with 2.1 million members in the healthcare field, the public sector and property services. Brandon leads one of the nation's largest political programs dedicated to winning for working families, and is tasked with developing and implementing a national member focused and member driven campaign to win key 2012 elections while building permanent political infrastructure in the field that will lead to real policy change for working families in 2013 and beyond. Before becoming the National Political Director, Brandon was the Deputy National Political Director for Member Engagement at SEIU and worked diligently on SEIU's fight to win historic national healthcare reform. Brandon joined

SEIU in 2007 as the Political Director for SEIU's Missouri State Council. Prior to SEIU, Brandon worked extensively on electoral campaigns, including Senator Claire McCaskill's 2006 campaign.

David Donnelly Executive Director, Public Campaign Action Fund



David Donnelly is a 20-year veteran of money-in-politics efforts, and has managed dozens of policy and political

campaigns at both the state and federal level. He has pioneered groundbreaking political accountability work to educate voters about the role of money in politics in issue and candidate campaigns. Since 2002, David has led Public Campaign Action Fund, where he currently serves as Executive Director. He determines strategy, fundraises, and represents the organization in the media and elsewhere. Among the projects David incubated and co-founded is Friends of Democracy, a pro-reform super PAC, which had dramatic success in its first election cycle in 2012. David has helped craft winning strategies for reform policy victories in seven states, including managing the referendum to pass Maine's landmark Clean Elections law. He has also run national accountability campaigns, including a multi-year, national campaign to drive Tom DeLay out of office. Among the reform community's leading political strategists, David has managed two-dozen issue campaigns leading to pro-reform candidate victories, including five U.S. Senators. He is a nationally recognized analyst and his commentary is often featured in the nation's leading news outlets.

Lucy Flores
Assemblywoman,
Nevada State Assembly



Flores was elected to the Nevada State Assembly in 2010, and became vice chair of the Nevada Hispanic Legislative Caucus in 2012. She is running for Lieutenant Governor of Nevada in 2014. Flores became one of first Latina members of the Nevada Assembly. In the Assembly, Flores represents the neighborhood she grew up in. She serves on the transportation, ways and means, and legislative operations and elections committees. Flores was re-elected in 2012 without opposition and became an assistant majority whip. Flores was honored with the Excellence in Legal Clinics Award by UNLV in 2010 and the Hubbard Award by the Mexican-American Alumni Association of USC in 2007. In 2013, Flores was named a Rodel Fellow by the Aspen Institute. Flores has been affiliated with the National Association of Latino Elected and Appointed Officials, and the Stonewall Democratic Club of Southern Nevada.

Andrew D. Gillum
Commissioner,
Tallahassee City Commission



At the age of 23 while attending Florida A&M University, Gillum became the youngest person ever elected to the five-member Tallahassee City Commission in Florida. He has served as a Commissioner since 2003. He currently serves as the lead commissioner for the Innovation and Engagement Target Issue Committee, co-commissioner

for Financial Viability Target Issue Committee; and a member of the Joint Planning Board for Human Services Partnership. He also serves on the Board of Directors for The Schott Foundation for Public Education in Cambridge and the New World Foundation. He has previously served as the Director of Youth Leadership Programs for PFAWF. Among other accolades, Gillum received the "Emerging Leaders Award" from the Congressional Black Caucus Foundation, Inc, and was featured in *Ebony* magazine's 2004 edition as one of "The Fast Track 30 Leaders Who are 30 and Under."

Alison Lundergan Grimes
Secretary of State, Kentucky
Candidate for U.S. Senate



Alison Lundergan Grimes is the current Kentucky Secretary of State and is running in the Democratic primary for the 2014 United States Senate election in Kentucky. Allison was an associate attorney at Lexington's Stoll Keenon Ogden from 2004 to 2011 before running for Secretary of State, practicing intellectual property and complex business law. She points to a domestic violence case she won for a single mother as inspiration for her political career. Named 2010 Outstanding Young Lawyer by the Fayette County Bar Association, she also served as president of the Fayette County Women Lawyers' Association and was a member of the 2008 Democratic National Committee. Grimes graduated cum laude from the Washington College of Law at American University in Washington, D.C. While at American, Grimes participated in public policy research for the National Kidney Foundation.

Larry Grisolano
President and CEO,
AKPD Message and Media



In 30 years as a political and advertising professional, Larry Grisolano has been at the center of some of the most important battles for the Democratic Party and for progressive ideas, and earned recognition for his management of complex advertising campaigns. Larry served as Director of Paid Media and Opinion Research for Obama for America and Obama-Biden 2008, where he directed an integrated paid advertising program that spent over \$350 million between June of 2007 and November of 2008. In 2011, Larry again served as Director of Paid Media for the Obama-Biden re-election campaign where he led an effort to develop innovative targeting of television buys to target persuadable voters. Larry is President and CEO of AKPD Message and Media, a leading national political advertising firm founded by David Axelrod. He is a founder of Analytics Media Group, which provides advanced audience analysis and targeted planning and buying for television.

SPECIAL GUESTS

Vanita Gupta
Deputy Legal Director, ACLU

Vanita Gupta is Deputy Legal Director of the American Civil Liberties Union and Director of the ACLU's Center for

Justice, which houses the organization's criminal justice reform, prisoners' rights, and capital punishment work. She is leading the ACLU's National Campaign to End Overincarceration. Vanita is also an adjunct clinical professor at NYU School of Law. Vanita was a staff attorney with the ACLU's Racial Justice Program, focusing on systemic criminal justice reform, immigration detention, and education litigation. She won a landmark settlement on behalf of immigrant children detained in a privately-run prison in Texas that led to the end of "family detention" at the facility. Prior to joining the ACLU, Vanita was at the NAACP Legal Defense Fund where she served on the legal team that won freedom for renowned prison journalist Wilbert Rideau. Vanita has won numerous awards for her advocacy and has been quoted extensively in the media.

Katrina vanden Heuvel
Editor and Publisher, The Nation

Katrina vanden Heuvel is Editor and Publisher of *The Nation*. She is a frequent commentator on American and

international politics for ABC, MSNBC, CNN and PBS. She writes a weekly web column for *The Washington Post* and is the author

of *The Change I Believe In: Fighting for Progress in The Age of Obama*. She is also the editor of *Meltdown: How Greed and Corruption Shattered Our Financial System* and *How We Can Recover* and co-editor of *Taking Back America—And Taking Down The Radical Right*. She has received awards for public service from numerous groups, including the Liberty Hill Foundation, North Star Fund, the Asian American Legal Defense Fund, the New York Civil Liberties Union and American Rights at Work's Eleanor Roosevelt Award. She serves on the boards of several organizations, including Campaign for America's Future, Institute for Policy Studies, The Nation Institute, and The Four Freedoms Park Conservancy.

Josh Horwitz
Executive Director, Coalition to Stop Gun Violence

Joshua Horwitz, J.D., is Executive Director of the Coalition to Stop Gun Violence. He has spent more than two decades

working on gun violence prevention issues. Josh developed the long-term strategy to close illegal firearms markets as a way to focus the gun violence prevention movement on the huge gaps in our nation's laws that allow criminals to easily obtain firearms. This strategy includes implementation of policies such as universal background checks. He has managed dozens of issue campaigns and testified before the U.S. Congress and a number of state and local legislative bodies. Following the Supreme Court's controversial *D.C. v. Heller* decision in 2008, Josh

helped the District of Columbia rewrite its laws to comply with the ruling and protect public safety. His advocacy was also instrumental in enacting a first-of-its-kind microstamping law in California in 2007.

Ian Inaba
Executive Director, Citizen Engagement Lab

Ian Inaba is a social entrepreneur working at the intersection of technology, media and politics. As

Executive Director of Citizen Engagement Lab, he's helped the incubation and growth of various progressive advocacy organizations including Color of Change, Coworker, Demand Progress, Faithful America, Presente and Ultra Violet. He's currently working on the launch of a new incubator to assist in the creation of progressive social impact companies. As a filmmaker, Ian directed the Sundance award-winning documentary *American Blackout*, chronicling voter suppression and is currently producing a television documentary on the ongoing political battle to expand and contract the American electorate. Ian is on the board of the League of Conservation Voters Education Fund and Independent Television Service (ITVS). He was previously a Silicon Valley executive, an investment banker and is a graduate of the Wharton School of Business and the School of Engineering and Applied Science at the University of Pennsylvania.

Valerie Jarrett
Senior Advisor to President
Barack Obama, The White House



Ms. Jarrett oversees the Offices of Public Engagement and Intergovernmental Affairs and chairs the White House

Council on Women and Girls. Prior to joining the Obama Administration, she was the Chief Executive Officer of The Habitat Company. She also served as Co-Chair of the Obama-Biden Presidential Transition Team, and Senior Advisor to Obama's presidential campaign. Ms. Jarrett has held positions in both the public and private sector, including the Chairman of the Chicago Transit Board, the Commissioner of Planning and Development for the City of Chicago, and Deputy Chief of Staff for Mayor Richard M. Daley. She also practiced law with two private law firms. Jarrett also served as a director of corporate and not for profit boards, including Chairman of the Board of the Chicago Stock Exchange, Director of the Federal Reserve Bank of Chicago, and Chairman of the University of Chicago Medical Center Board of Trustees.

Saru Jayaraman
Co-Founder, The Restaurant
Opportunities Centers United
(ROC-United)



Saru Jayaraman is the Co-Founder/ Co-Director of the Restaurant Opportunities Centers United (ROC-United) and

Director of the Food Labor Research Center at University of California, Berkeley.

After 9/11, together with displaced World Trade Center workers, she co-founded ROC in New York, which has organized restaurant workers to win workplace justice campaigns, conduct research and policy work, partner with responsible restaurants, and launch cooperatively-owned restaurants. ROC now has 13,000 members in 32 cities. The story of Saru, her co-founder, and the founding ROC is chronicled in the book *The Accidental American*. Saru is a graduate of Yale Law School and Harvard Kennedy School of Government. She authored *Behind the Kitchen Door*, Cornell University Press, 2013, a national bestseller. She's appeared on CNN with Soledad O'Brien, Bill Moyers (PBS), Melissa Harris Perry and *UP with Chris Hayes* (MSNBC), *Real Time with Bill Maher* (HBO), and *NBC Nightly News with Brian Williams*.

Angela Kelley
Vice President
for Immigration Policy,
Center for America Progress



Angela Kelley, a well-known authority on the policy and the politics of immigration, joined American Progress in 2009 as Vice President for Immigration Policy. In the years since, the organization has published numerous impactful reports and analyses on a range of immigration issues including the economic impact of state anti-immigrant laws, the economic value of immigration reform, the cost of mass deportation, and the integration trends of America's newcomers. Kelley is widely quoted in the press, including *The New York Times* and *Politico*, and makes

frequent appearances, including appearances on PBS, MSNBC, and NPR. Kelley also served as director of the Immigration Policy Center, a research and rapid-response organization. Prior to that Kelley was deputy director at the National Immigration Forum, where she headed its legislative, policy, and communications activities and oversaw its operations. The daughter of South American immigrants, she began her career as an attorney representing low-income immigrants.

Heather McGhee
President, Demos



Heather C. McGhee is President of Demos, a public policy organization working for an

America where we all have an equal say in our democracy and an equal chance in our economy. McGhee is an influential voice in the media and frequent contributor to MSNBC. Her opinions, writing and research have appeared in numerous outlets, including the *Wall Street Journal*, *USA Today*, National Public Radio, the *Washington Post*, and the *New York Times*. In 2009, she co-chaired a task force within Americans for Financial Reform, and in 2008 she served as the Deputy Policy Director in charge of Domestic and Economic Policy with the John Edwards for President Campaign. She holds a B.A. in American Studies from Yale University and a J.D. from the University of California at Berkeley School of Law. She serves on the boards of Public Campaign, the Center for Working Families, and Consumer Reports.

SPECIAL GUESTS

Ethan Nadelmann
Founder and Executive Director
Drug Policy Alliance



Described by *Rolling Stone* as "the point man" for drug policy reform efforts, Ethan Nadelmann is widely regarded

as the outstanding proponent of drug policy reform both in the United States and abroad. The Drug Policy Alliance is the leading organization in the United States promoting alternatives to the war on drugs. Nadelmann received his B.A., J.D., and Ph.D. from Harvard as well as a Masters' degree from the London School of Economics. He has authored two books and his writings have appeared in most major media outlets in the U.S. as well as top academic journals, policy journals, and political publications. He is interviewed frequently by media and news programs on major U.S. networks as well as dozens of networks elsewhere. Nadelmann and his colleagues have played pivotal roles in most of the major drug policy reform ballot initiative campaigns in the United States.

Cecile Richards
President, Planned Parenthood
Federation of America and
Planned Parenthood Action Fund



Cecile Richards is president of Planned Parenthood Federation of America and Planned

Parenthood Action Fund, national organizations that work for a healthier world for women and teens. More than 700 Planned Parenthood health centers provide health care services to nearly three

million people and sex education to more than one million people every year. Since joining Planned Parenthood in 2006, Ms. Richards has expanded its advocacy power and developed a unified national web presence receiving 52 million online visits annually. A frequent commentator on women's rights, reproductive health, and sex education, she is a contributor to the Huffington Post and serves on the board of the Ford Foundation.

Mark Ritchie
Secretary of State, Minnesota



Secretary of State Mark Ritchie is Minnesota's chief election officer. Ritchie is active in the National Association

of Secretaries of State, serving as president in 2011. As part of his official duties Ritchie serves on the State Executive Council; State Board of Investment; Historical Society Board; National Guard Senior Advisory Council and Minnesota's Civil War Commemoration Task Force. In the 1980s and 90s, Ritchie worked to address the economic crisis threatening family farms and rural communities as president of the Institute for Agriculture and Trade Policy and executive director of the League of Rural Voters. In 2004 Mark served as national coordinator for the November 2nd Campaign, the largest non-partisan voter registration campaigns in recent history. He ran for Secretary of State in 2006 and won. In his first two terms he has overseen three statewide recounts and successfully passed and implemented four major updates to Minnesota's election laws.

Rashad Robinson
Executive Director, ColorOfChange



Rashad Robinson serves as Executive Director of ColorOfChange, the nation's largest online civil rights organization.

Under Robinson's leadership, ColorOfChange has been at the forefront of issues ranging from fighting for justice for Trayvon Martin, to battling attempts to suppress the Black vote, to ending Pat Buchanan's tenure as an MSNBC analyst. Robinson spearheaded ColorOfChange's American Legislative Council (ALEC) national campaign. After ColorOfChange exposed ALEC's involvement in passing discriminatory voter ID and harmful Shoot First laws, over 50 corporate funders ended their financial support of ALEC.

Justine Sarver
Executive Director,
Ballot Initiative Strategy Center



Justine Sarver is the Executive Director of the Ballot Initiative Strategy Center, the progressive community's only

research and capacity-building organization focused solely on ballot measures. Before joining BISC, Sarver worked as the Deputy Chief of Staff for Health and Human Services Secretary Kathleen Sebelius. Previously, she worked on President Obama's campaign as the Southwest Regional Director, overseeing campaign activities in key battleground states. Throughout her career, Sarver has been intensely involved with ballot initiative campaigns, working to defeat two parental notification

measures in California. She served as the Organizing Director for the ACLU of Northern California and as Vice President of the Planned Parenthood Affiliates of California. Sarver also was the Political Director for the San Diego Labor Council, AFL-CIO. She is a graduate of the University of Michigan-Ann Arbor.

Eric Schneiderman
Attorney General, New York State



Eric T. Schneiderman was elected the 65th Attorney General of New York State on November 2, 2010. The Attorney

General has taken a leading role in the national fight for a comprehensive investigation of misconduct in the mortgage market. He has also launched "Taxpayer Protection Bureau" to root out fraud and return money illegally stolen from New York taxpayers at no additional cost to the state and bolstered the Attorney General's Medicaid Fraud Control Unit. Before becoming Attorney General, Schneiderman was praised as a leading reformer in the State Senate. Among his legislative accomplishments, Schneiderman passed sweeping ethics reforms, chaired the committee to expel a corrupt senator for the first time in modern history, led the effort to reform the draconian Rockefeller drug laws, and enacted the toughest law in the nation to root out fraud against taxpayers.

Rep. Debbie Wasserman Schultz
Chair, Democratic National Committee



Debbie Wasserman Schultz was sworn in as a member of the U.S. House of Representatives representing

Florida's 23rd Congressional district in 2005. She is the first Jewish Congresswoman ever elected from Florida. On April 6, 2011, Rep. Wasserman Schultz was nominated by President Obama to serve as chair of the Democratic National Committee. Before joining the U.S. Congress, she was first a Representative and later a Senator in the Florida State Legislature. Currently, Wasserman Schultz serves on the House Committee on Appropriations, the House Appropriations Subcommittee on State and Foreign Operations, and is the ranking member of the Legislative Branch Subcommittee. She also serves as a Chief Deputy Whip and is a member of the Congressional Caucus for Women's Issues. She is married to Steve Schultz; together they have three children and reside in Weston, Florida.

Frank Sharry
Executive Director, America's Voice



Frank Sharry is one of America's leading advocates and spokespersons for broad immigration reform. He

appears frequently in print, on radio and on television to discuss and debate immigration policy and politics. He currently serves as the Executive Director of America's Voice, a Washington, DC-based advocacy group. The mission of America's Voice is to build the

political will for policy change. The group's priority is to win a path to citizenship for the 11 million undocumented immigrants in America. Before founding America's Voice, he served for 17 years as Executive Director of the National Immigration Forum, one of the nation's premier immigration policy organizations. Before coming to Washington, DC, he worked in the Boston area, serving as the Executive Director of Centro Presente, an organization working with Central American refugees, and helping to co-found the Massachusetts Immigrant and Refugee Coalition.

Zach Silk
Campaign Manager, Washington United for Marriage



Experienced political consultant Zach Silk is the campaign manager for Washington United for

Marriage, the coalition of organizations, congregations, unions, and businesses working together to secure civil marriage in 2012 for loving, committed Gay and Lesbian couples in Washington state. Silk was deputy campaign manager for Governor Chris Gregoire's 2008 reelection effort and campaign manager for U.S. Congressional candidate Darcy Burner in 2006. Prior to that, he was the political director for Washington Conservation Voters. More recently, he has turned his attention to business and entrepreneurship. He founded Kila Ventures, a technology company, in 2010. Silk holds a master's degree in public administration from the University of Washington.

SPECIAL GUESTS

David Simas
Assistant to the President and
Deputy Senior Advisor
for Communications and Strategy,
The White House



David M. Simas currently serves as Assistant to the President and Deputy Senior Advisor for Communications and Strategy. Prior to joining the White House, Mr. Simas was the Director of Opinion Research for the Obama for America Presidential re-election campaign. He served as a Deputy Assistant to the President for Special Projects from 2010 through 2011 and as a Special Assistant to the President and aide to Senior Advisers David Plouffe and David Axelrod from 2009 through 2010. Simas previously served as Deputy Chief of Staff to Massachusetts Governor Deval Patrick and as a policy adviser to the Mayor of Taunton, MA. He was elected Register of Deeds for the Northern Bristol County, MA and to the City Council and School Committee in Taunton, MA. A Taunton Massachusetts native, Mr. Simas received a bachelor's degree with high honors from Stonehill College and received his JD from Boston College Law School.

Theda Skocpol
Victor S. Thomas Professor
of Government and Sociology
American Politics,
Harvard University



At Harvard, she has served as Dean of the Graduate School of Arts and Sciences and as Director of the Center for American Political Studies. Skocpol served as President of the Social Science History Association and as President of the American Political Science Association during the

centennial of this leading professional body. She was awarded the Johan Skytte Prize in Political Science for her "visionary analysis of the significance of the state for revolutions, welfare, and political trust, pursued with theoretical depth and empirical evidence." The Skytte Prize is one of the largest and most prestigious in political science and is awarded annually. Skocpol has also been elected to membership in all three major U.S. interdisciplinary honor societies: the American Academy of Arts and Sciences, the American Philosophical Society, and the National Academy of Sciences. Skocpol co-founded and is current director of the Scholars Strategy Network.

Marcia Smith
President, Firelight Media



Marcia A. Smith, a writer, filmmaker, and non-profit executive, is President of Firelight Media. Firelight Media is renowned for documentary film production as well as programs to support emerging filmmakers, including its Producers' Lab, Community Engagement Program, and the Next Step Fund. During her tenure, Firelight produced over 18 hours of film for national broadcast on PBS, and garnered every major award in television, including Primetime Emmys, Peabody, Sundance, DuPont, and International Documentary Association (IDA) awards. Firelight's award-winning films include the multiple Emmy-winning *Freedom Riders*, *Jonestown: The Life and Death of Peoples Temple*, and *The Murder of Emmett Till*. Smith was honored by the Writers' Guild with the award for Best Documentary writing for the film *The Murder of Emmett Till*, and with a Primetime Emmy nomination in writing for the same film. Her

acclaimed book, *Black America: A Photographic Journey, Past to Present*, was published by Thunder Bay Press.

Richard Trumka
President, AFL-CIO



Richard L. Trumka was elected AFL-CIO president in September 2009. He served as AFL-CIO secretary-treasurer since 1995. Born in Nemaquin, Pa., Trumka was elected to the AFL-CIO Executive Council in 1989. At the time of his election to the secretary-treasurer post, he was serving his third term as president of the Mine Workers (UMWA). At the UMWA, Trumka led two major strikes against the Pittston Coal Co. and the Bituminous Coal Operators Association. The actions resulted in significant advances in employee-employer cooperation and the enhancement of mine workers' job security, pensions and benefits. Trumka was named one of Esquire Magazine's 2011 Americans of the Year. He received a bachelor of science degree from Pennsylvania State University in 1971 and a law degree from Villanova University in 1974.

Roxana Tynan
Executive Director, LAANE



Roxana joined LAANE in 2001 and served as deputy director for six years until assuming the executive director position in February 2012. She has spent her entire career advancing the cause of social and economic justice. Ms. Tynan was the guiding force behind LAANE's groundbreaking Community Benefits Program, which has pioneered a new model for

economic development in Los Angeles and the country. She negotiated many of LAANE's Community Benefits Agreements as well as the Los Angeles Superstore Ordinance, which has successfully limited Walmart's expansion efforts in Los Angeles. Ms. Tynan has been instrumental in the expansion of LAANE's work and impact over the past decade. She has also played a leading role in developing LAANE's community organizing department, mentoring young organizers and creating one of the region's most effective grassroots recruitment and advocacy programs. Prior to LAANE, she served as economic development deputy to L.A. City Councilmember Jackie Goldberg.

Cristina Tzintzun
Executive Director,
Workers Defense Project



Cristina Tzintzún is the Executive Director of Workers Defense Project (WDP), a statewide, membership-based workers' rights organization that is

winning better working conditions for Texans. At WDP, Tzintzún has spearheaded efforts to ensure safe and dignified jobs for the nearly 900,000 construction workers that labor in the state. WDP is supported by the Texas Future Project, founded by Democracy Alliance Partners. Her work has led to a federal investigation by OSHA into Texas' deadly construction industry, the passage a statewide wage theft law, and better, safer jobs for thousands of low-wage workers in Austin and Travis County. She has been named "Hero of the New South" by Southern Living Magazine and won the national Trabajadora Community Leader award from the National Labor Council for Latin American Advancement. Her work has been covered in the *New York Times*,

National Public Radio, Univision, and *USA Today*.

Dorian Warren
Assistant Professor,
Columbia University



Dorian T. Warren specializes in the study of inequality and American politics. His research and teaching interests

include labor organizing & politics, race and ethnic politics, urban politics and policy, American political development, community organizing, public policy, and social science methodology. Warren is also a Faculty Affiliate at the Institute for Research in African-American Studies, Faculty Fellow at the Institute for Social and Economic Research and Policy, and coordinates the Center for Urban Research & Policy Seminar Series. A native Chicagoan, Warren received his B.A. from the University of Illinois and his M.A. and Ph.D. from Yale University. He has also worked with several national and local organizations including the Leadership Conference on Civil Rights, American Rights at Work, AFL-CIO, UNITE-HERE, SEIU, and UFCW. He currently serves on the boards of the Applied Research Center, Center for Community Change, and Columbia Law School's Center for Social and Institutional Change.

Shannon Watts
Founder, Moms Demand Action for
Gun Sense in America



Shannon Watts is a 42-year-old mother of five children (two step-daughters, 23 and 19; two daughters, 17 and

16; and a 12-year-old son). For the past five years, Ms. Watts has been a stay-at-home mom in Zionsville, a suburb of Indianapolis, Indiana. Prior

to that, she had a 15-year career as a communications executive for both public relations agencies and Fortune 500 corporations. Ms. Watts was not an activist or involved in gun issues prior to the shootings at Sandy Hook on Dec. 14, 2012. The day after the tragedy, she started a Facebook page called Moms Demand Action for Gun Sense in America. Since then, Moms Demand Action has become a nonprofit organization with tens of thousands of members and more than 80 local chapters across the country. Ms. Watts' goal is for Moms Demand Action to become the Mothers Against Drunk Driving of safe gun laws.

Lizz Winstead
Co-Creator, *The Daily Show*



As co-creator and former head writer of *The Daily Show* and *Air America Radio* co-founder, Lizz Winstead has helped changed

the very landscape of how people get their news. As a performer, Winstead brought her political wit to *The Daily Show* as a correspondent and to the radio waves co-hosting *Unfiltered*. Her national comedy tour to benefit Planned Parenthood and NARAL has raised over 2 million dollars and was made into a documentary film, *Smear Campaign* won "Best Documentary Comedy Short" at the Atlanta Documentary Film Festival. Winstead's first book, *Lizz Free Or Die, Essays*, was released in 2012. Her talents as a comedian and media visionary have been recognized by major media outlets including *The New York Times* and *The Washington Post*. Winstead continues to make television appearances, including Comedy Central Presents, HBO, CNN and MSNBC. Winstead also writes commentary for *The Wall Street Journal* and *The Huffington Post*.

DA BOARD OF DIRECTORS

Robert (Rob) L. McKay Chair



Rob is the President of the McKay Family Foundation, which supports community-based organizations working for long-term social, political, and economic progress. Rob, along with his brother and parents, established the McKay Foundation in 1992 to bring healthcare coverage and a living wage to low-income workers. Rob's commitment to funding advocacy work has extended beyond philanthropy to include raising awareness around the issue of greater civic engagement and voter participation. Rob is also the managing partner for the McKay Investment Group, which provides venture capital for early-stage technology and consumer product companies. He serves on a number of corporate and non-profit boards, including the Ms. Foundation for Women, Salon Media Group, and Mother Jones magazine. Originally from Orange County, Rob received a B.A. in Political Science from Occidental College in Los Angeles and a Master's Degree from the University of California at Berkeley in Social and Public Policy.

Mary Kay Henry (SEIU) Vice Chair



Mary Kay serves as International President of the Service Employees International Union (SEIU), the fastest-growing union in North America with 2.2 million workers in healthcare, public, and property services. Mary Kay joined SEIU's staff in 1979, rising to become chief healthcare

strategist and International Executive Vice President in 2004. She led the union's efforts to win a stronger voice for healthcare workers and enact historic healthcare reforms. In 2010, Henry was unanimously elected International President. Mary Kay sits on the boards of the Economic Policy Institute, American Income Life, Fresh Thinking, and is an advisory member of the National Catholic Scholars for Worker Justice. She also serves on the Change to Win Leadership Council and is a founding member of SEIU's gay and lesbian Lavender Caucus. Mary Kay previously served on the executive board of Families USA and was a labor adviser to the U.S. Catholic Conference of Bishops.

Paul Egerman Treasurer



Paul is a retired software entrepreneur who previously founded two successful health information technology companies: eScription, a company that provides dictation and transcription management and automatic speech recognition for the healthcare industry and IDX Systems Corporation, a worldwide supplier of administrative and financial solutions for healthcare organizations. Paul is involved in several progressive political campaigns, recently serving as finance chair for Elizabeth Warren. He also cares deeply about Israel and is affiliated with progressive Israel policy groups as a member of the J Street Advisory Council and Board of Directors for the New Israel Fund. Paul holds a B.S. in Mathematics from the Massachusetts Institute of Technology.

Gara LaMarche President

David Desjardins



David is a private investor, an active philanthropist, and a supporter of many progressive groups and organizations.

David and his wife Nancy Blachman are founders of the Julia Robinson Mathematics Festival, a program of math education and enrichment for middle and high school students. A mathematician and software engineer, David was among the first 20 employees at Google, where he worked from 1999 to 2005. Since leaving Google, David continues to engage with mathematical research. David is a trustee of the University of California Berkeley Foundation, and a member of two visiting committees at MIT. David has degrees from MIT and the University of California at Berkeley. His dissertation involved the analysis of a mathematical game, with applications to information theory.

Jim Gollin



Through the Angelica Foundation, Jim and Suzanne Gollin fund environmental, pro-democracy and human rights groups in the U.S. and Mexico. Jim chairs New Mexico's progressive donor collaborative and is President of the Board of Rainforest Action Network. Jim worked at a number of think tanks in Japan and the U.S., was an investment banker at Nomura Securities and Morgan Stanley International in Tokyo and

then in London, co-founded the investment management company Pacific Partners in New York, is a founding member of the Social Venture Network, and is an active real estate investor. Jim received his undergraduate degree from Princeton University and a Masters from John Hopkins School of Advanced International Studies in International Economics and Japanese Studies. He lives in Santa Fe, with his wife Suzanne and son, Noah.

Nick Hanauer



Nick is chairman of Pacific Coast Feather Company and vice chairman of Marchex, Inc. In 2000, he became a founding partner of the venture capital firm, Second Avenue Partners, where he serves on the boards of both MarketLeader, and Qliance Medical Group. Nick is also the former chairman of the board of aQuantive, a digital marketing services and technology company that sold to Microsoft for \$6 billion. Nick is actively involved in the Seattle community. In 2000, he co-founded the League of Education Voters and set out to help transform the educational system and increase student achievement. He is a current board member of the University of Washington Foundation. A Seattle-area native, Nick is an avid adventure traveler who has visited more than 60 countries, a fly fisherman, and an amateur astronomer. He and his wife, Leslie, reside in the Seattle area with their two children.

Weston Milliken



Weston Milliken, Ph.D. is a management consultant specializing in human and organizational development, philanthropy, and quality improvement. He serves on a number of for-profit and non-profit Boards. Weston lives in Los Angeles.

Yolanda "Cookie" Parker



Yolanda "Cookie" Parker was the founder and President of KMS Software Company which specialized in software for Human Resources Departments. A visionary and authority in process automation, Parker began her career over 40 years ago with IBM. After leaving IBM, she continued her professional career as a Director at CGS and Vice President of Sales and Operations at NCS and CPR, before starting her own firm in 1994. In 1998, Parker developed the first paperless online solution in the nation, to automate the onboarding, crossboarding, and offboarding processes for Human Resource Departments, currently the fastest growing software application in the human capital management sector. She recently started The Parker Group, which is focused on matching companies with resources needed for success. Her current projects include a power plant in Ghana and two tech start-ups. Along with her business and professional accomplishments, Cookie's philanthropic activities include memberships on the Board of People for the American Way, Real Medicine Foundation, and Find-A-Tree. Cookie has also raised substantial funds for brain cancer

research at Cedars-Sinai Medical Center; and is a member of Women Presidents' Organization in Los Angeles. Cookie served on President Obama's National Finance Committee for both 2008 and 2012 campaigns; was a National Co-Chair for Technology for Obama, and is now working with Organizing for Action. An entrepreneur, community and political activist, Cookie is married to Fred Parker and is the mother of two. She received her BA and MA from NYU.

Steven Phillips



Steve is an attorney and political organizer in San Francisco. He is the Chairman of Vote Hope, a federal PAC that supports candidates who champion policies of hope and justice. Over the past 20 years, Steve has worked as an education reformer, attorney, and elected official. Steve has written nearly 100 columns and essays published in newspapers across the country. In 2003, he founded PowerPAC.org, a statewide social justice organization working with community activists to build political power in California. In 1992, at the age of 28, Steve successfully ran for a seat on the San Francisco Board of Education, and became the youngest elected official in the city's history. He attended Hastings College of the Law, and in 1997, began practicing civil rights and employment discrimination law. He successfully litigated against a broad number of entities ranging from municipalities to multi-million dollar corporations.

DA BOARD OF DIRECTORS

Cynthia Ryan



Cynthia is the former principal of Boston-based The Schooner Foundation, a family foundation that honors human dignity, thinks big, and acts where trustees see the greatest need and opportunities for leverage locally, nationally and globally. Cynthia is a current or former trustee of National Braille Press, Women for Women International, the Ploughshares Fund and the National Association of Health Education Centers. She is a member of the Peace & Security Funders Group, the International Human Rights Funders Group, National Network of Grantmakers, Women Waging Peace, and Grantmakers Without Borders. She serves on the Advisory Board of the Carr Center for Human Rights Policy and on the Women's Leadership Board at the John F. Kennedy School of Government at Harvard University. She was a member of the Advisory Committee of the Women's Rights Division at Human Rights Watch and a member of the Women Donors Network. Cynthia received her B.A. from the New School for Social Research in New York and a Masters of Arts from the School of Oriental & African Studies at University of London in England.

John Stocks (NEA)



John is the executive director of the National Education Association. Previously, John served as assistant executive director for public affairs at the Wisconsin Education

Association Council. He also served as executive director of Idaho Fair Share, a grassroots citizen action organization dedicated to keeping utility rates affordable for working families, and spearheaded legislation on behalf of low and moderate income utility ratepayers. He currently sits on several boards, including Partnership for 21st Century Skills, and Learning First Alliance. In 1988, John ran successfully for State Senate in Idaho. His legislative record includes successfully shepherding a bill to improve protections for people facing foreclosure on their homes due to family medical crises. He established his bona fides in political strategy as chief architect of the Idaho Senate Democrats' re-election plans, securing seven new Senate seats and protecting all incumbents over three election cycles. A native of New Orleans, John is a graduate of Evergreen State College in Olympia, Washington. He and his wife, Connie, have two children.

Ted Trimpa



Ted is the Principal and President of Trimpa Group, a national political consulting and government relations firm specializing in public policy advocacy and political strategy at the state and federal levels. Ted is one of the country's most sought-after advocates resulting from his deep understanding of the national and multi-state public policy, political and nonprofit landscape. He has been recognized in national publications, including The Atlantic Monthly, National Review, The Advocate, and The Weekly Standard for his central role in

designing cutting-edge public policy strategies. Prior to forming Trimpa Group, Ted was a shareholder at Hogan Lovells where he was responsible for matters before the Colorado General Assembly and had a multi-state public policy practice. Ted has orchestrated the successful passage of several public initiatives, including major social policy changes and landmark reforms to state fiscal policy. He previously served as the Director of Regulatory Affairs and Assistant General Counsel for a prominent lobbying firm in Colorado. Before attending law school, Ted served as a legislative aide for United States Senator Nancy Landon Kassebaum.

Rob Stein Founder Emeritus



Rob Stein is Founder of the Democracy Alliance and Co-Founder of the Committee on States.

An attorney by training, Rob has founded and run several non-profit organizations (1979-1988); was Strategic Advisor to the Chairman, Democratic National Committee (1989-1992); was Chief of Staff of the Washington Office of the Clinton-Gore Transition (1992); served as chief of Staff of the United States Department of Commerce (1993-1995), and was a private equity investor working with dozens of early-stage companies (1996-2002). Rob's original, comprehensive research (2003-2004) about the funding, management and overall infrastructure of the conservative movement over the last three decades led to the formation of the Democracy Alliance.

DA STAFF AND ADVISORS

Gara LaMarche President



Gara LaMarche is President of the Democracy Alliance (DA), providing overall leadership, strategic vision

and management capacity for the organization. Prior to joining the Alliance, Gara served as Senior Fellow at New York University's Robert F. Wagner Graduate School of Public Service and previously, as President and CEO of the Atlantic Philanthropies. At Atlantic, he led the foundation's efforts to embrace a social justice framework for grantmaking, and spearheaded the largest-ever grant made by a foundation for an advocacy campaign - over \$25 million to press for comprehensive health care reform in the U.S. Before joining Atlantic in 2007, Gara served as Vice President and Director of U.S. Programs for the Open Society Foundations (OSF), launching the organization's pivotal work on challenges to social justice and democracy in the United States. A longtime advocate for human rights at home and abroad, he has held various positions with Human Rights Watch, PEN American Center, and the American Civil Liberties Union (ACLU). Gara is a frequent commentator on progressive issues in the news, and is the author of numerous articles on human rights and social justice issues, which have appeared in the New York Times, Washington Post, Financial Times, The Nation, and American Prospect, among many others. He has taught courses on philanthropy, public policy, and non-profit leadership at NYU's Wagner School, as well as courses at the New School University and the John Jay College of Criminal Justice. A Westerly, Rhode Island, native, he is a graduate of Columbia College at Columbia University in New York.

Julie Kohler Manager Director



As Executive Vice President, Julie Kohler is the principal deputy of the Democracy Alliance, overseeing

operations, ensuring synergy between the Investment and Partner Services divisions, and leading the organization's Investment Services Team. Kohler brings to the DA over a decade of experience in philanthropy, with deep expertise in civic engagement, state infrastructure, policy/advocacy, and social innovation grant making. Prior to joining DA, Kohler served as Director for Education & Civic Engagement at Public Interest Projects, where she managed four funding collaboratives designed to promote stronger participatory democracy and more equitable public schools. She also directed the John S. and James L. Knight Foundation's National Venture Fund, which invested \$13 million annually in civic engagement and social venture projects, and taught at the University of Maryland. Kohler holds a M.A. and Ph.D. in family social science from the University of Minnesota.

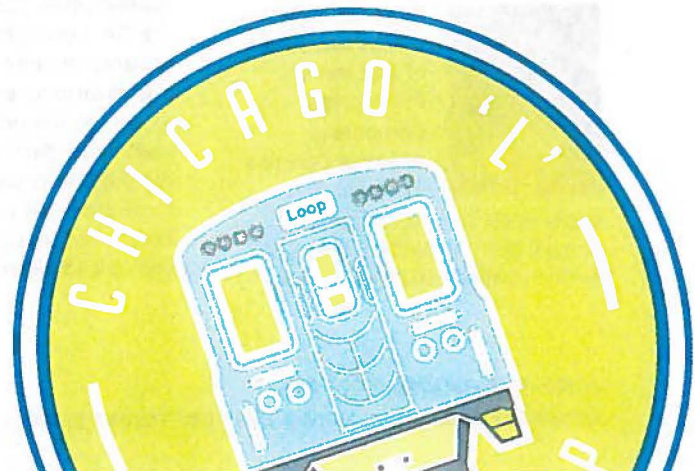
Alexandra Acker-Lyons Director, Youth Engagement Fund

Caitlin Blair Recruitment Manager, Partner Services



Caitlin Blair is the recruitment manager within the Partner Services team at the Democracy Alliance. Blair

joined the DA after spending five years on the campaign trail. Most recently she worked as the finance director for Aneesh Chopra, former U.S. Chief Technology Officer and candidate for Lt. Governor of Virginia. Previously, Blair worked as a regional finance director on the successful campaign of U.S. Senator Tim Kaine (D-VA). Blair also worked for HM Consulting in Washington, DC as a fundraising consultant on the successful 2010 campaign of Sen. Michael Bennet (D-CO) and CHC BOLD PAC, a PAC dedicated to electing members to Congress who will add diversity to our leadership and who will address issues that impact the Hispanic community in the United States. Blair began her political career as an intern for U.S. Senator Mark Warner (D-VA) on his successful 2008 campaign. Blair graduated from Dickinson College with a degree in political science. Blair is a Virginia native who now lives in Washington, DC.



DA STAFF AND ADVISORS

Kelly Craighead Senior Advisor



Kelly Craighead serves as Senior Advisor to the Democracy Alliance. As a member of the founding

management team, she has helped provide the leadership, strategic vision, and management capacity necessary to grow the DA into one of the largest drivers of progressive activist support for institutions that strengthen democracy and build the overall capacity of the progressive movement. Prior to joining the DA on a full-time basis, Craighead consulted with new organizations, including Media Matters for America and the Democracy Alliance, bringing them hands-on operations, positioning, communications, financial management, fundraising, program development and best practices expertise. Craighead also has worked for former Secretary of State Hillary Clinton, during both her tenure as First Lady and later at her leadership PAC after she was elected to the United States Senate. In the White House, with the rank of Deputy Assistant to the President, Craighead was the Director of Special Projects and managed special domestic and international initiatives on behalf of the President and First Lady. Craighead lives with her family in Washington, DC.

Kimberly Douglas Director, Operations



Kimberly Douglas serves as Director of Operations. Prior to the Democracy Alliance, Douglas had extensive

experience in customer service, special events, meeting planning, administration, operations, and

systems management in both nonprofit and corporate organizations. While attending Frostburg State University, Douglas worked at WPGC 95.5 FM as a broadcast news intern. After graduation, Douglas worked at the Association of Clinical Research Professionals (ACRP), where she served as ACRP's first Education Services Representative. Douglas was instrumental in helping design and implement ACRP's Customer Service Center. In 2005, Douglas joined the Forum for Youth Investment as their Office/Meetings Manager and served as the primary liaison between staff and external vendors. Douglas also worked as the Administrative Director for the Population Institute. Douglas has a Master's degree in Organizational Communications and Human Resources from Bowie State University and a Bachelor of Arts degree in Mass Communications, Ballet, and Modern Dance from Frostburg State University.

Dominic Lowell Vice President, Investment Services



Dominic Lowell is responsible for leading all of the Democracy Alliance's progress monitoring and investment

research - setting rigorous benchmarks for all recommended organizations and conducting extensive due diligence on APOs' progress toward those mutually agreed-upon goals. In his tenure at the DA, Lowell has written rigorous progress monitoring reports on the organizational and financial health, as well as the programmatic and political impact, of over 40 progressive organizations across three different portfolios cycles. Lowell has managed relationships with organizational leaders and key

stakeholders within the movement, and he has conducted research on demographic, technological, and political trends (in both conservative and progressive movements), in order to generate timely briefings and updates for DA Partners. Recently, he led the DA's efforts to engage scores of organizations as part of its new approach to recognize and track the work and impact of the broader progressive infrastructure. Lowell is a native of Salt Lake City, Utah, though his heart now belongs to Washington, DC, where he enjoys cycling, trivia, and far too many political blogs. He is a graduate of Swarthmore College where he earned a B.A. in Sociology/Anthropology.

Tori Miyagi Associate, Investment Services



Tori Miyagi joined the Democracy Alliance in 2012 where he supports Investment Services' sector-

focused monitoring and analysis. Miyagi works with movement stakeholders to elicit, analyze, communicate, and document the programmatic and political impact of the progressive infrastructure for DA Partners. Within the investments unit, Miyagi focuses on development and execution of the due diligence process to better understand movement drivers and trends. Prior to joining the DA, Miyagi worked for a political consulting firm and as an organizer for local and federal campaigns in New Jersey and Hawaii. Miyagi was raised in a union family in the western United States and is a proud union member. He attended Boston University and American University.

Eddy Morales Director, Latino Engagement Fund

Jenna Narayanan
Vice President,
Partner Services



Jenna Narayanan comes to the Democracy Alliance with ten years' experience in development and politics. Before joining the DA, Narayanan was the Vice President of Development and Strategic Partnerships at NDN. Prior to leading the fundraising operation for NDN, Narayanan was the Director of Development at Democracia USA. Narayanan was also the Mid-Atlantic and Southern Finance Director for the Edwards for President Campaign, where she focused on Ohio, Pennsylvania, Virginia, Alabama, Georgia and Louisiana. Narayanan has also worked for Swanson Consulting in Washington DC as a strategic fundraising consultant on federal and non-federal campaigns across the nation. During this time she raised money on a wide variety of clients that included the American Association for Justice, the Human Rights Campaign, and People for the American Way. Additionally, Narayanan raised money for John Edwards' One America Committee and the Center for Promise and Opportunity.

Ngozi Neziyana
Senior Analyst,
Investment Services



As a Senior Analyst on the Investment Services team, Ngozi Neziyana monitors the performance and evaluates the impact of the Democracy Alliance's recommended organizations, and he helps develop investment strategy for the DA portfolio. Neziyana heads the DA's efforts to centralize data on the progressive movement at-large, and he also tackles projects that

include tracking dynamic political movements and benchmarking hundreds of millions of dollars in liberal and conservative political funding. Before joining the DA, Neziyana worked as the Interim Head of the Leadership Department at African Leadership Academy in Johannesburg, South Africa. There, he spearheaded the research, writing, and design of the Academy's two year leadership curriculum; taught courses in leadership and entrepreneurship; and coached students on developing and launching new enterprises. To hone his skills at analysis, Neziyana enrolled in the Summer Institute for General Management at the Stanford Graduate School of Business (GSB), where he earned the Dean's Award for Excellence - an academic honor given by Stanford GSB professors. Outside of the DA, he is a Fellow with both the StartingBloc Institute for Social Innovation and Management Leadership for Tomorrow, and he occasionally finds time to nurture his love of hip hop dance. Neziyana is a graduate of Yale University, where he earned a B.A. in Political Science.

Erick Pleitez
Communications Associate,
Partner Services



Erick Pleitez is the Democracy Alliance's Partner Services and Communications Associate, helping to maintain the channels of communication between Partners and DA Partner Organizations. Prior to joining the DA, Pleitez served as the Junior Electoral Data Manager at the Center for Community Change. While at the Center Erick worked with its partner organizations to maximize their access to voter file data, enabling them to run efficient voter registration and GOTV efforts. Prior to joining the Center, Pleitez served as Voto Latino's Data and

Targeting Manager; Pleitez identified VL's target universe for both its (c)(3) and (c)(4) efforts, developed VL's voter registration program and voter contact strategies. A first-generation American, Pleitez received his B.A. in Government from Cornell University.

Ryan R. Rodriguez
Vice President, Partner Services



Ryan Rodriguez is responsible for coordinating the Democracy Alliance's semi-annual conferences, regional events, and other Partner engagement activities. Prior to joining the DA, Rodriguez was the National Events Manager for EMILY's List, where he organized their national conferences, their annual DC luncheon, and a variety of other fundraising events around the country. Rodriguez has a diverse events and development background. He has worked as the finance director and on the finance staff for a number of congressional races including Gwen Moore (WI-04, the first African American elected to the U.S. House from Wisconsin), Eleanor Jordan (KY-03), and Christine Jennings (FL-13). Before getting his start in politics, Rodriguez spent several years at the Smithsonian Institution where he secured corporate sponsorships, helped build the endowment, and organized opening receptions nationwide for the Smithsonian's traveling exhibition service. Rodriguez studied politics, computer information systems, and applied physics and has a B.A. in Political Science from the American University. Rodriguez is a native of Wisconsin and enjoys reading presidential biographies and historical non-fiction about the War of 1812, when he is not on his bike or yoga mat.

DA STAFF AND ADVISORS

Frank Smith Political Director



Frank Smith serves as the de-facto political director of the Democracy Alliance and has been involved in political and public policy issues throughout his career. He is President of a Cambridge, Massachusetts consulting firm specializing in election and non-profit law and policy work. He has served as an Assistant District Attorney in Boston and worked on a number of political campaigns, including two Presidential elections. He is co-author of a recent book on the American healthcare system and writes a monthly newsletter on American politics. He is a graduate of Georgetown University and Boston College Law School, and a member of the Massachusetts Bar. He has served on a number of non-governmental organization boards.

Katherine Storch Senior Analyst, Investment Services



Katherine Storch joins the Democracy Alliance as a Senior Research Analyst with the Investment Services team. She previously worked at Sachs Waldman, P.C., a Detroit firm known as a progressive and effective representative of labor organizations and their members, as well as a significant force in

plaintiff's personal injury law litigation. While in law school she clerked at the Free Legal Aid Clinic, assisting indigent Detroit residents in family law matters, was a leader in the student chapter of the American Constitution Society, and founded her school's chapter of the Student Animal Legal Defense Fund. Storch holds a Juris Doctor from Wayne State University Law School, a Masters in European Studies from Jagiellonian University, Krakow and a Bachelor of Arts in Political Science and History from the University of Michigan. In her spare time she enjoys experimenting in the kitchen, exploring new cities, and spending time with her rescued dog, Todd.

Wendi Wallace Manager, Executive Office and Board Relations



Wendi Wallace serves as Executive Assistant to the Managing Director at the Democracy Alliance. Prior to joining the DA, she worked with Americans for Financial Reform as both a Field Coordinator and assistant to the Executive Director. After graduating from Miami University in Ohio in 2004, Wallace began working in real estate and mortgage. While working on mortgages she saw how the housing crisis was impacting the lives of moderate, low income and immigrant families. It was here that an interest in immigration reform as well as many other issues addressed by the progressive movement inspired Wallace to seek her current career path.

Robert Wimberley Manager, Partner Services



Robert Wimberley oversees research operations within Partner Services at the Democracy Alliance. Before joining the organization, Wimberley worked as a political opposition researcher for over forty campaigns across the country. Wimberley had previously worked as the finance director for a myriad of campaigns in red states, including a congressional race in Texas that earned a spot on the DCCC's highly competitive Red-to-Blue program. His first campaign, straight out of the University of California at Berkeley, was working field in West Virginia and Florida for the 2004 Kerry/Edwards presidential campaign. Wimberley holds a B.A. in both Political Science and French. Originally from Los Angeles, Wimberley lives in DC with his wife, Sarah. In his spare time, Wimberley volunteers with Special Olympics.

GENERAL CONFERENCE INFO

DA STAFF OFFICE

DA staff members are available to assist you with any questions or special needs you may have. They are available at the Registration Desk or in the DA Staff Office, located in the Vendome Room. It is open from 8:00 a.m. - 9:00 p.m. on Sunday, Monday, and Tuesday, and from 8:00 a.m. - 1:00 p.m. on Saturday. DA staff members are available to assist you with any questions or special needs you may have.

SUPPORTING DA-RECOMMENDED ORGANIZATIONS AT THE CONFERENCE

On Monday evening, DA Partners and Advisors will participate in an "Intentions Session." During this meeting, they will be asked to finalize their commitments to support Alliance Partner Organizations (APOs) and Dynamic Investments in 2014 and beyond. Partners are also encouraged to meet with their DA staff contact at any time during the conference to ask questions and discuss their

contributions. In addition, Partners may update their "Statement of Activities" that they received at check-in and submit it to any member of the DA staff throughout the conference. Additional copies of this statement are available at the Registration Desk. To help inform funding decisions, DA staff can also help schedule private meetings with any of the APO leaders in attendance.

PARTNER RESOURCE ROOM

The Partner Room is located in the Trianon B Room. Resources, including APO progress reports, assessments, and evaluations of organizations from previous and current DA Portfolios are available. Refreshments are also always available and Partners may also access a computer in order to check their e-mail, print boarding passes, etc. to access the Partner Resource Room, visit the Registration Desk.

DA AFTER HOURS

Join fellow conference attendees for a cocktail and late-night networking at the lobby bar.

DA LISTSERV

DA Partners and Advisors can take the conference discussions to the next level by participating in the DA Listserv. If you haven't yet joined the listserv, visit the Registration Desk to register. Once you've registered, share your thoughts on conference content with the group by simply e-mailing DApolitics-list@googlegroups.com

WIRELESS INTERNET ACCESS

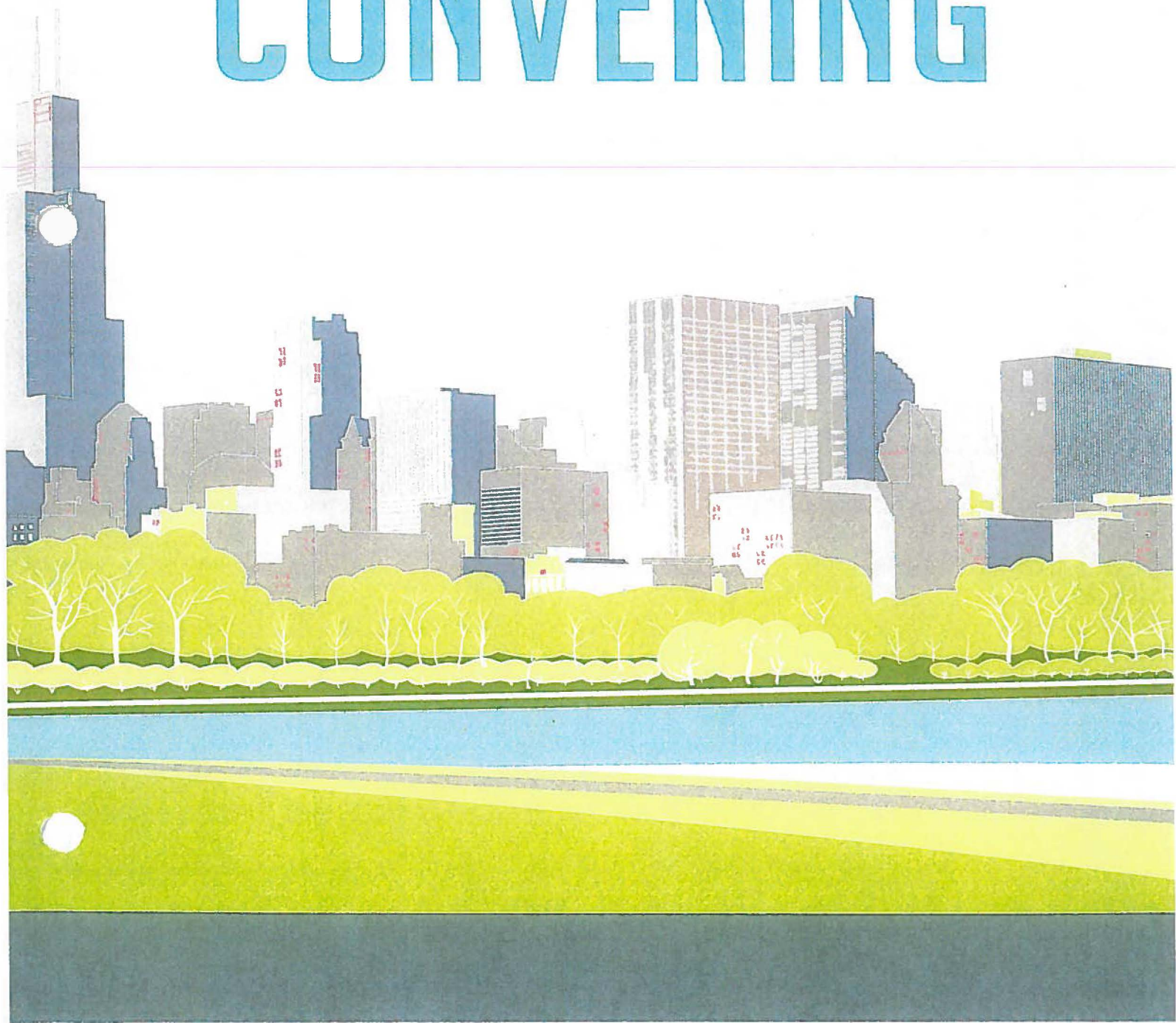
To access wireless internet during the Democracy Alliance conference:

- Connect to the "RitzCarlton_Meeting" network;
- Open a web browser;
- You will be automatically directed to the hotel's log-in page;
- Enter the PIN "democracy14"

If you have any difficulties accessing the network, call 312-573-5236 or dial 0 from any hotel phone and ask the operator for the Audio Visual office.



DEMOCRACY ALLIANCE
NATIONAL FUNDERS
CONVENING



April 29, 2014



On behalf of the Democracy Alliance (DA), welcome to Chicago!

The Democracy Alliance was established nearly ten years ago to help build and align progressive institutions and donors to counteract the Right's influence on American politics and policies and advance a progressive agenda. The DA plays several valuable roles in the progressive community, but one of them, which this convening embodies, is as a place for leaders to come together, form and renew relationships, and plan for action. Funders and movement leaders, labor and "capital," progressive foundations and political leaders — nowhere do these communities connect and work together as they do in the Democracy Alliance.

This National Funders Convening comes at a critical time as we approach the 2014 midterm elections. With the success of the Tea Party in the 2010 midterm elections, many of our progressive values have come under attack — assaults on women's rights, higher taxes for low-income people, attacks on our environment, and more. As we head into another midterm election, it is important that we take a look at lessons learned from 2010 to help ensure that progressives have the best possible footing in November and beyond, and set the stage for 2016 and looming redistricting battles.

We look forward to engaging in these and other important conversations and we hope you will leave inspired to engage in the difficult work ahead.

Sincerely,

A handwritten signature in blue ink, appearing to be 'Rob McKay'.

Rob McKay
Board Chair

A handwritten signature in blue ink, appearing to be 'Gara LaMarche'.

Gara LaMarche
President





CONVENING OVERVIEW

TUESDAY, APRIL 29

- 11:00 a.m. Registration and Information Desk Opens [Promenade]
- 12:30 - 2:30 p.m. National Funders Convening Lunch: 2014 and Beyond - An Election Preview [Ballroom]
- 3:00 - 4:00 p.m. National Funders Convening Workshops
Protecting Access to the Polls [Glass]
Winning Strategies on Healthcare in the States [Versailles]
- 4:30 - 5:30 p.m. National Funders Convening Workshops
Maintaining and Enhancing Progressive's Technical Edge [Versailles]
Ballot Initiatives in 2014 and Beyond [Glass]
- 5:30 - 7:45 p.m. Cocktail Reception: State Battles, State Victories - How to Win In 2014 (Funders Only) [Concorde]
- 7:45 - 9:00 p.m. Dinner with David Axelrod - Reflections on a Career in Journalism, Politics, and the Obama Journey [Ballroom]
- 9:00 - 11:30 p.m. Late-Night Networking [Lobby Bar]

WEDNESDAY, APRIL 30

- 8:00 a.m. Registration and Information Desk Opens [Promenade]
- 8:00 a.m. Partner Resource Center Opens (Partners Only) [Trianon B]
- 9:00 - 9:30 a.m. Opening Remarks by Planned Parenthood Action Fund President Cecile Richards [Ballroom]
- 9:30 - 11:00 a.m. Breakfast Discussion: Spotlight on Engaging the New Majority [Ballroom]
- 11:30 a.m. - 12:30 p.m. Partner-Organized Caucus Meetings
Scholars Strategy Network [Glass]
Hosted by David desJardins and Bob Bowditch
No Shortcuts: Building Power for the Long Haul [Versailles]
Hosted by Michael Vachon and Ken Zimmerman
- 1:00 - 3:00 p.m. Optional Activity: Organizing for Action Open House (Shuttle departs from Lower Lobby at 1:00 p.m.) [off-site]

TUESDAY, APRIL 29

TUESDAY AT-A-GLANCE

- 11:00 a.m. Registration and Information Desk Opens [Promenade]
- 12:30 - 2:30 p.m. National Funders Convening Lunch: 2014 and Beyond - An Election Preview [Ballroom]
- 3:00 - 4:00 p.m. National Funders Convening Workshops
Protecting Access to the Polls [Glass]
Winning Strategies on Healthcare in the States [Versailles]
- 4:30 - 5:30 p.m. National Funders Convening Workshops
Maintaining and Enhancing Progressive's Technical Edge [Versailles]
Ballot Initiatives in 2014 and Beyond [Glass]
- 5:30 - 7:45 p.m. Cocktail Reception: State Battles, State Victories - How to Win in 2014 (Funders Only) [Concorde]
- 7:45 - 9:00 p.m. Dinner with Political Strategist David Axelrod [Ballroom]
- 9:00 - 11:30 p.m. Late-Night Networking [Lobby Bar]



A NEW PROGRESSIVE ERA?

DEMOCRACY ALLIANCE SPRING 2014 INVESTMENT CONFERENCE

PRIVATE AND CONFIDENTIAL TO DEMOCRACY ALLIANCE

NATIONAL FUNDERS CONVENING

12:30 - 1:00 p.m.

Lunch Buffet Opens [Ballroom]

1:00 - 2:30 p.m.

Lunch Discussion: 2014 and Beyond - An Election Overview [Ballroom]

After stunning victories in 2008, progressives stayed home in 2010 and Tea Party candidates prevailed. The result has plagued the nation ever since, resulting in an assault on women's rights, higher taxes for low-income people, attacks on our environment, and more. Progressives must win key state and federal races in 2014 to stop this tide of harmful public policy and set the stage for 2016 and upcoming redistricting battles. This discussion is intended to be a primer on the midterm elections and preview strategies for persuading and turning out a winning majority in November.

DA Partners and organizations will be joined by:

- > Rising star and U.S. Senate candidate **Alison Lundergan Grimes**, who will give remarks about her bid to unseat Senate Majority Leader Mitch McConnell and help Democrats retain the U.S. Senate;
- > **Catalist** CEO **Laura Quinn**, who will give us a data-driven lay-of-the-land, analyzing recent election results and outlining the challenges and opportunities we face this cycle;
- > White House Political Director **David Simas**, who will share what the White House is doing to ensure that Affordable Care Act is successful - and an achievement progressives can tout on the campaign trail;
- > and Democracy Alliance President **Gara LaMarche**, who will preview the Democracy Alliance's strategy for engaging in this election, including going deep into states and maintaining a strong focus on engaging and mobilizing key progressive constituencies.



TUESDAY, APRIL 29 (CONTINUED)

3:00 - 4:00 p.m.

National Funders Convening Workshops - Round 1

Following our 2014 election overview, attendees will have the opportunity to participate in two additional small-group workshops, designed to engage Partners in deep discussions on several of the short- and long-term strategies that we must pursue in order to see victories in November and beyond. We will again be joined by a number of movement experts who will be on hand to share their perspectives on the opportunities and challenges that we'll face from a resurgent Right in the midterms and in the long-term.

Workshop 1: Protecting Access to the Polls [Glass]

Facilitator: Patricia Bauman, DA Partner

Respondents: Mark Ritchie, Minnesota Secretary of State
Judith Browne Dianis, Advancement Project Co-Director

Workshop 2: Winning Strategies on Healthcare In the States [Versailles]

Facilitator: Raj Goyle, Former Kansas State Representative

Respondents: Larry Grisolano, Former Obama for America Senior Strategist
David Simas, Assistant to the President and Deputy Senior Advisor for Communications and Strategy, The White House

4:30 - 5:30 p.m.

National Funders Convening Workshops - Round 2

Workshop 3: Ballot Initiatives in 2014 and Beyond [Glass]

Facilitator: Cristina Uribe, DA Partner

Respondent: Justine Sarver, Ballot Initiatives Strategy Center Executive Director

Workshop 4: Maintaining and Enhancing Progressives' Technical Edge [Versailles]

Facilitator: Paul Rudd, DA Partner

Respondents: Christie George, New Media Ventures Director
Laura Guinn, Catalist Chief Executive Officer
Ethan Roeder, New Organizing Institute Executive Director
Ian Inaba, Citizen Engagement Lab Executive Director

5:30 - 7:45 p.m.

Cocktail Reception: State Battles, State Victories - How to Win In 2014 (Funders Only)

Please join other attendees for cocktails at this reception themed around how progressives can win in the states in 2014 and beyond. At 6:00 p.m., we'll be joined by **Democratic National Committee** Chair **Debbie Wasserman Schultz** for an update on what the DNC is doing to prepare for November and lay the groundwork for 2016. Then, at 6:30 p.m., in a special program organized in partnership with **Committee on States**, DA Partners **Anne Bartley** and **John Stocks** will update us on electoral efforts in key states nationwide.

7:45 - 9:00 p.m.

Dinner with David Axelrod - Reflections on a Career in Journalism, Politics, and the Obama Journey [Ballroom]

Over dinner, we will be joined by **David Axelrod**, a 35-year veteran of American politics and journalism and Chicago native. In a wide-ranging discussion led by DA Partner **Paul Harstad**, David will discuss his work with more than 150 local, state, and national campaigns, and his work helping elect two Democratic presidents,

9:00 p.m. - 12:00 a.m.

Late-Night Networking [Lobby Bar]

WEDNESDAY, APRIL 30

WEDNESDAY AT-A-GLANCE

8:00 a.m.	Registration and Information Desk Opens [Promenade]
8:00 a.m.	Partner Resource Center Opens (Partners Only) [Trianon B]
9:00 - 9:30 a.m.	Opening Remarks by Planned Parenthood Action Fund President Cecile Richards [Ballroom]
9:30 - 11:00 a.m.	Breakfast Discussion: Spotlight on Engaging the New Majority [Ballroom]
11:30 a.m. - 12:30 p.m.	Partner-Organized Caucus Meetings
1:00 - 3:00 p.m.	Optional Activity: Organizing for Action Open House (Shuttle departs from Lower Lobby at 1:00 p.m.) [off-site]

WEDNESDAY DETAILS

8:00 a.m.	Registration and Information Desk Opens [Promenade]
8:00 a.m.	Breakfast Buffet Opens
8:00 a.m.	Partner Resource Room Opens [Trianon B]
9:00 - 9:30 a.m.	Remarks by Planned Parenthood Action Fund President Cecile Richards [Ballroom]

REMARKS BY PLANNED PARENTHOOD ACTION FUND PRESIDENT **CECILE RICHARDS**

Women voters – particularly single women and women of color – made the difference in races up and down the ballot in 2012 and turned out strongly for now-Governor Terry McAuliffe and other candidates in the 2013 Virginia election. Planned Parenthood Action Fund President Cecile Richards will talk about her organization's success in mobilizing women in elections and issue advocacy campaigns, highlight the central role that women and voters of color are playing in every progressive victory across the country, and discuss the implications of this profound electoral shift for our progressive policy agenda going forward.



Cecile Richards

WEDNESDAY, APRIL 30 (CONTINUED)

9:30 - 11:00 a.m.

Breakfast Discussion: Spotlight on Engaging the New Majority [Ballroom]

Throughout the National Funders Convening, attendees have heard the political challenges progressives face this year and different strategies that promise the greatest impact. This last session will dive deeply into one of the most important pieces of that discussion: how to engage and mobilize the Rising American Electorate (RAE) for victory in 2014 and organize a New Majority to advance our agenda in 2016 and beyond.

The Black Civic Engagement Fund, the Latino Engagement Fund, the Women's Equality Center, and the Youth Engagement Fund have engaged millions of Americans in elections and issue-advocacy efforts. SEIU Political Director Brandon Davis will lead a discussion with Dream Defenders Executive Director Phillip Agnew, ColorofChange Executive Director Rashad Robinson, Workers Defense Project Executive Director Cristina Tzintzún, and Nevada Assemblywoman Lucy Flores. Together, these leaders will share their perspectives on how the Funds' collective investments have already had an impact in their states, highlighting the organizing and power-building efforts the Funds are supporting and the difference that mobilized RAE votes have had on election and policy outcomes. Join a dynamic conversation about the national implications of a mobilized and solidly progressive RAE and how funders can further support this work.

11:30 a.m. - 12:30 p.m.

Partner-Organized Caucuses

Scholars Strategy Network [Glass Room]

Hosted by David desJardins and Bob Bowditch

The Scholars Strategy Network (SSN) is a fast-growing group organizing America's leading scholars to address public policy issues. It was founded by DA Partner Bob Bowditch and DA Board Member David desJardins and Harvard University Professor Theda Skocpol in 2009, and has grown to over 400 members at 117 universities and includes 19 regional networks across the country. Members prepare and publish short, vivid briefs highlighting their research findings and relevance to policy issues, and engage with policymakers, journalists, bloggers, activists, and advocacy groups. Professor Skocpol will describe the impact that SSN is having, and its growth plan to do even more.

No Shortcuts: Building Power for the Long Haul [Versailles]

Hosted by Michael Vachon and Ken Zimmerman

Over the last 15 years, a coalition of unions, community-based organizations, and activists have built a powerful progressive infrastructure in New York State. The emergence of the Working Families Party as what the New York Times has called the "preeminent force in New York politics," the 2010 election of Attorney General Eric Schneiderman, "the man the banks fear most," according to the American Prospect, and a clean sweep by progressive candidates in last year's mayoral election, are the products of years spent planning, organizing, and executing effective campaigns. This session will discuss how progressive leaders in New York built and sustained the necessary coalitions and how success in the Empire State can be a model for other states, effectively reviving the idea that it is possible to be both independent and relevant.

1:00 p.m.

Buses Depart for Organizing for Action Open House [Lobby]

1:00 - 3:00 p.m.

Organizing for Action Open House

Join Organizing for Action (OFA) at an open house at their Chicago headquarters. Since its formation in January 2013, more than four million people have taken action through OFA's grassroots efforts to make their voices heard and press forward on the crucial issues that Americans voted on in 2012. Through joint efforts with partner organizations and the dedication of OFA's diverse grassroots army, OFA focuses on an array of issues including gun violence prevention, comprehensive immigration reform, the budget and the economy, climate change, healthcare, women's rights, and marriage equality - among others - as well as investing and growing the next generation of organizers.

Transportation will be provided from the Ritz-Carlton to the open house and then on to O'Hare Airport. A shuttle will depart from the lower lobby of the Ritz Carlton at 1:00 p.m.

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Alexandra Acker-Lyons Director, DA Youth Engagement Fund



Alexandra Acker-Lyons is the Director of the Youth Engagement Fund at the Democracy Alliance. She is author of the book, *The Political Ladder: Insider Tips on Getting a Job in Politics*, and is a recognized political analyst on cable news. Alexandra also consults for Share Our Strength and the National Democratic Institute. Alexandra's expertise in youth politics culminated during the 2008 election cycle, when she served as Executive Director of the Young Democrats of America. She was also the National Youth Outreach Director for John Kerry's presidential campaign. Alexandra previously served as the Executive Director at Democratic GAIN and has also worked for the Lawyers' Committee for Civil Rights, Planned Parenthood Federation of America, the Democratic Congressional Campaign Committee, and Congresswoman Nita M. Lowey (D-NY). Alexandra graduated magna cum laude from the State University of New York at Binghamton and lives in MountainView, CA.

Bradley Beychok President, Media Matters for America



Bradley Beychok is the President of Media Matters for America. He joined Media Matters as an executive vice president in 2012 from American Bridge 21st Century. Beychok served as campaign

director for the group, which was known for its tracking, research and ad campaigns across several competitive races during the 2012 cycle. Beychok is a veteran of several Democratic Senate, and House campaigns as well.

Deepak Bhargava Executive Director, Center for Community Change



Deepak Bhargava is Executive Director of the Center for Community Change, a national non-profit organization whose mission is to develop the power and capacity of low-income people, especially low-income people of color, to change the policies and institutions that affect their lives. Bhargava is also the executive director of the Center's 501(c)(4) sister organization, the Campaign for Community Change. Under his leadership, CCC has played a leading role in campaigns to achieve universal health care coverage, improve jobs and safety net policies and advance Comprehensive Immigration Reform. Prior to his appointment as Executive Director in 2002, Bhargava served as the Center's Director of Public Policy. He currently serves on the boards of the Bauman Foundation, Discount Foundation, The Nation editorial board, the National Advisory Board for the Open Society Institute, and Democracia Ahora. Born in Bangalore, India, Bhargava immigrated to the United States when he was a child. He grew up in New York City and graduated summa cum laude from Harvard College.

David Brock Board Chair and Founder, Media Matters for America



David Brock is the founder of Media Matters for America, a progressive research and information center dedicated to comprehensively monitoring, analyzing and correcting conservative misinformation in U.S. media. In the seven years since its founding Media Matters has become the premiere progressive research and communications hub and has led successful national advertiser education campaigns that led to Lou Dobbs being dropped from CNN for his anti-immigrant rhetoric and Glenn Beck's show being dropped by Fox News. Following the 2010 elections, Brock founded American Bridge 21st Century, a new type of political operation aimed at holding Republican candidates for public office accountable through a combination of research and tracking. In the 18 months since its founding American Bridge has become the preeminent research and tracking firm garnering over \$200 million in earned media value, and providing content to Priorities USA, Majority PAC and House Majority PAC.

CHICAGO

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Jon Carson
Executive Director,
Organizing for Action



Jon Carson is the Executive Director of Organizing for Action. Carson served as the Director of the White House Office

of Public Engagement (OPE) until January 2013. Before leading OPE, he served as the Chief of Staff at the White House Council on Environmental Quality (CEQ). Prior to joining the Administration, Carson was the National Field Director for President Barack Obama's campaign in 2008 and worked on the Obama transition team. Carson also managed Tammy Duckworth's 2006 general election campaign in Illinois' 6th Congressional District and has worked on many political campaigns over the last decade, including Al Gore's 2000 presidential campaign. Carson served in the Peace Corps in southern Honduras for two years, building water systems for rural villages. He graduated from the University of Wisconsin-Platteville with a B.S. in Civil and Environmental Engineering and received a Master's Degree in Geography from the University of California-Los Angeles.

Kate Chapek
Executive Director,
Womens Equality Center



Kate Chapek is the founder of the Women's Equality Center, an organization that fosters collaboration

among partner organizations to build capacity at the national and state level in order to create a movement to increase choices and

achieve real equality victories for women across the country. Chapek served as the National Women's Vote Director for President Barack Obama's Re-election Campaign and led the campaign's efforts to engage and inform women of all demographics on the important national issues concerning women. In addition to candidate campaigns, She has extensive organizational experience that includes her work with Emily's List, America Votes, Hillary Clinton for President, Communication Workers of America, and Obama for America. Chapek is a graduate of the Annenberg School of Journalism at the University of Southern California and earned a Master's Degree in Journalism from Georgetown University. Being mom to her 3 year old daughter Sinatra is her greatest accomplishment.

Caroline Fredrickson
President,
American Constitution Society



Caroline Fredrickson has been ACS's President since 2009. She previously served as the director of

the ACLU's Washington Legislative Office and as General Counsel and Legal Director of NARAL Pro-Choice America. Fredrickson was Chief of Staff to Senator Maria Cantwell and Deputy Chief of Staff to then-Senate Democratic Leader Tom Daschle. During the Clinton administration, she served as Special Assistant to the President for Legislative Affairs. Fredrickson graduated from Yale University and Columbia University School of Law, where she was a Harlan Fiske Stone scholar, served on the *Columbia Law Review* and co-founded the *Columbia Journal of Gender and Law*. She has been widely published

and appears frequently in the media on topics including labor law, anti-discrimination law and human and civil rights.

Christie George
Director, New Media Ventures



Christie George is the Director of New Media Ventures, the first national network of angel investors supporting media

and tech startups that disrupt politics and catalyze progressive change. At New Media Ventures, a project of the Democracy Alliance, George has overseen the investment of over \$3 million into a portfolio of non-profits and for profits, including NationalField, Sum of Us and Upworthy. George has spent her entire career guiding think tanks, development organizations and media startups to significant growth and impact. She started her career at a venture capital firm and has spent over a decade working in media, including six years managing sales and marketing for Women Make Movies, the world's leading distributor of films by and about women. She is a co-founder and Board Member of LoudSauce, the crowd-funded media-buying platform for ideas that matter. George received her B.A. from Yale University and her MBA with distinction from the University of Oxford, where she was a Skoll Scholar in Social Entrepreneurship and graduated with the Said Prize, awarded annually to the program's top student. George was recently named a Social Citizen Ambassador by the Case Foundation.

Bob Greenstein
President, Center on Budget Policy and Priorities



Bob Greenstein is the Founder and Executive Director of the Center on Budget and Policy Priorities. He is considered an expert on the federal budget and a range of domestic policy issues. Greenstein has written numerous reports, analyses, op-ed pieces and magazine articles on budget-and poverty-related issues. He appears on national television news and public affairs programs and is frequently asked to testify on Capitol Hill. In 2008, Greenstein received both the Heinz Award for Public Policy in recognition of his work to "improve the economic outlook of many of America's poorer citizens," and the John W. Gardner Award from Independent Sector for playing "a defining role in how people think about critical budget and tax policies." In 1996, Greenstein was awarded a MacArthur Fellowship. The MacArthur Foundation cited Greenstein for making "the Center a model for non-partisan research and policy organization." In 1994, President Clinton appointed him to serve on the Bipartisan Commission on Entitlement and Tax Reform. Prior to founding the Center, Greenstein was the Administrator of the Food and Nutrition Service at the US Department of Agriculture.

Arshad Hasan
Executive Director, ProgressNow



Arshad Hasan is the new Executive Director of ProgressNow. He was previously the Executive Director of Democracy for America. During his time at DFA, he developed and directed the DFA's grassroots training programs, DFA Campaign Academy and DFA Night School before being elevated to the role of Executive Director. Prior to DFA, Arshad worked with a variety of PACs and non-profits on legislative issue campaigns, corporate accountability campaigns, grassroots fundraising and electoral campaigns. While Hasan was Executive Director of DFA, the organization doubled membership from 500k to 1M, grew the budget from \$1.7M to \$4.5M, and specialized in upset electoral victories with early backing of successful candidates like Reps Alan Grayson, Donna Edwards and Jerry McNeerney.

Eddy Morales
Director, DA Latino Engagement Fund



Eddy Morales brings more than ten years of senior leadership experience to the Democracy Alliance, most recently serving as the Deputy Director of Voto Latino, an organization founded by Rosario Dawson aimed at increasing Latino civic engagement. While there, he helped increase the annual operating budget and oversaw strategy and day-to-day operations. Previously, Morales was the Deputy Director of Leadership Development at the Center for Community Change, where he

launched a leadership development program to recruit and nurture low-income community organizers of color into community based organizations. At the DA, Morales is the Director of the Latino Engagement Fund, a collaborative effort between individual and institutional donors designed to strengthen high-performing Latino civic engagement organizations and increase the political power of the growing Latino population. Since 2009, Morales has been continually recognized by Washington Life Magazine as one of the most influential people under 40 in DC.

Nick Penniman
Executive Director, Fund for the Republic



Nick Penniman is the Executive Director of the Fund for the Republic. He was the former executive director of the Huffington Post Investigative Fund, which he founded with Arianna Huffington in 2009. Prior to that, Penniman launched the American News Project and served as the Washington director of the Schumann Center for Media and Democracy, where he worked closely with broadcaster Bill Moyers, who Penniman first met in 1999 when he was running the Alliance for Democracy and working on campaign finance reform. He has been the publisher of *The Washington Monthly*, executive director of TomPaine.com, associate editor of the *American Project* and editor of the *Lincoln Journal*. Penniman has served on multiple nonprofit boards and advisory boards, including the Homeless Empowerment Project, which publishes *Spare Change News*, and the Roosevelt Institution.

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Laura Quinn Chief Executive Officer, Catalyst



Laura Quinn currently manages and helped found Catalyst, which provides comprehensive voter data and

related data services to progressive organizations. She is also a founding partner of QRS Newmedia, Inc. which specializes in communication technology design and integration services. In 2004, Quinn and a small group of investors launched Copernicus Analytics, a data mining firm focused on providing improved donor and voter analytics to progressive political clients. Prior to these endeavors, Quinn served as a Deputy Chief of Staff for Vice President Al Gore at the White House; as Director of the Democratic Technology and Communications Committee for Democratic Majority Leader Tom Daschle in the US Senate; as Communications Director for US Senator Jay Rockefeller. Prior to her work in business and government Quinn served in a variety of senior policy and communications positions in progressive not-for-profits, political organizations and campaigns.

Ethan Roeder Executive Director, New Organizing Institute



Ethan Roeder is the Executive Director of the New Organizing Institute. He ran the Data department for the Obama presidential campaigns in 2008 and 2012, pioneering the use of a large-scale data operation to support individualized, relationship-based organizing. His experience

also includes local and federal political campaigns as well as pro-labor and gay rights advocacy. Roeder's work is focused on building progressive strength through the intersection of traditional organizing and technology. He has convened numerous trainings and proctored countless new data practitioners in the progressive campaign space. Roeder has also done extensive work in Election Administration including managing NOI's Voting Information Project in partnership with Pew and Google in 2009 and 2010. Roeder is an art school graduate but can't draw to save his life.

Adrienne Shropshire Director, Black Civic Engagement Fund



Adrienne Shropshire is the Director of the Black Civic Engagement Fund. Shropshire is a consultant with

more than two decades of experience working to grow and expand organizing and civic engagement infrastructure across the country. She has served as the lead consultant to the Black Civic Engagement Fund since its inception in 2012. Shropshire has worked as a community and electoral organizer in South Los Angeles and NYC as well as in philanthropy as a foundation program officer and a collaborative fund director. Currently she is a strategy consultant and advisor to donors, civic engagement organizations, and labor unions. Shropshire's work nationally has deepened the capacity and impact of base-building groups in communities of color and advanced collaborative spaces that foster strategic coordination among

progressive organizations. Shropshire lives in NY with her family and serves on the national board of both State Voices and ColorOfChange.Org.

Erik Smith Executive Director and Founding Board Member, Common Purpose Project



Erik Smith is the Executive Director & Founding Board Member of Common Purpose Project. Smith has worked for more

than a decade at the intersection of politics and policy as a lead strategist and counselor to Senators, Congressmen and party committees. In 2008, Smith was a paid media advisor to the Obama-Biden presidential campaign where he designed, developed and placed television, radio and print advertising. Most recently, Smith served as the Creative Director of the Inauguration of the 44th President of the United States of America.

Greg Speed President, America Votes



Greg Speed has served as Executive Director of America Votes since October 2007. Under Speed's leadership,

America Votes coordinated over 62 million direct voter contacts in the successful 2008 election cycle. In 2004, Speed served as Communications Director for the Democratic Congressional Campaign Committee. Speed worked as Press Secretary and Legislative Assistant for House Democratic Caucus Chair Martin Frost. He directed communications for IMPAC 2000, the national

Democratic redistricting project, in 2001-2002. Speed has worked on many campaigns and served as Communications Director for Communities for Quality Education where he developed innovative programs combining community involvement, issue advocacy and direct voter contact. Speed hails from Chicagoland and received a B.A. from the University of Wisconsin-Madison.

Ted Strickland
President, Center for American Progress Action Fund



Gov. Ted Strickland (D-OH) is the President of the Center for American Progress Action Fund and Counselor to the

Center for American Progress. He served six terms in Congress and became Ohio's 68th governor. Most recently, President Obama nominated Ted to be a public delegate to the 68th U.N. General Assembly. Although he led Ohio during the Great Recession, Ted worked with Republican and Democratic legislators to jumpstart the economy, prioritize Ohio's education system, and usher in new advanced energy and energy efficiency standards in Ohio. During his terms in Congress, Ted built an impressive record. He was instrumental in expanding access to health insurance for children, ensuring that America kept its promises to our veterans, and bringing home millions in investments for roads, technology, economic development, and healthcare initiatives. Born to working-class parents in rural Ohio, Ted became the first in his family to attend college.

Tracy Sturdivant
Executive Director, State Voices



Tracy is the Executive Director of State Voices. Before joining State Voices in 2010, Tracy served as the Vice

President for External Affairs at the Center for Progressive Leadership, working to provide comprehensive, long-term development for diverse leaders across the country. She has worked in philanthropy, and with a host of other organizations, overseeing critical programs such as the White House Project's signature "Vote, Run, Lead" program and the National Coalition on Black Civic Participation's Black Youth Vote! and Black Women's Roundtable. Tracy is very active in the national civic engagement community, serving on the boards of the Proteus Fund, the Ballot Initiative Strategy Center, ProgressNow Education Fund, and the Center for Progressive Leadership. A self-proclaimed foodie, she also loves to travel, and especially enjoys anything that combines both interests.

Neera Tanden
President and CEO,
Center for American Progress



Neera Tanden is the President of the Center for American Progress and Counselor to the Center for American Progress

Action Fund. Most recently, Tanden served as the Chief Operating Officer for the Center, leading strategic planning of the organization and managing all operations. Tanden previously served as senior advisor for health reform at the Department of Health and Human Services, advising Secretary Kathleen Sebelius and working on President Obama's health reform team to develop and pass the Affordable Care Act. Prior to that, Tanden was the director of domestic policy for the Obama-Biden presidential campaign, where she managed all domestic policy proposals. Tanden had also served as policy director for the Hillary Clinton presidential campaign, directing all policy work and overseeing debate preparation. Tanden also served as associate director for domestic policy and senior advisor to the First Lady in the Clinton administration.



LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Gloria Totten**President, Progressive Majority**

Gloria A. Totten is the President of Progressive Majority, the only national organization dedicated to

electing progressive champions at the state and local levels. Totten built Progressive Majority in 2001 and through it has developed the nation's most comprehensive progressive candidate recruitment program. Totten served as Political Director for NARAL from 1996-2001 and Executive Director for Maryland NARAL from 1993-1996. In her home state of Minnesota, Totten worked on a number of electoral and issue campaigns, as the Education Director for Pro-Choice Resources, President and Lobbyist for the Minnesota Coalition Against Sexual Assault and Media Chair for It's Time Minnesota!, a campaign to expand anti-discrimination protections to GLBT individuals under the Minnesota Human Rights Code. Totten serves as chair of the board of directors for the Ballot Initiative Strategy Center and Brave New Films and a board member for PAC+. She is an Advisory Committee Member for the Drum Major Institute Scholars Program, ProgressNow, Wellstone Action and the Women's Information Network. Totten was named a "Rising Star of Politics" in 2002 by Campaigns & Elections magazine and was awarded the "Progressive Champion Award" by Campaign for America's Future and the "Progressive Leadership Award" by Midwest Academy in 2006.

Michael Waldman**President,
Brennan Center for Justice**

Michael Waldman is President of the Brennan Center for Justice at NYU School of Law, a nonpartisan law and policy institute

that focuses on improving the systems of democracy and justice. Waldman is one of the nation's most prominent public interest lawyers, and is an expert on the presidency, democracy and the Constitution. The Brennan Center is a leading legal voice on election law, Constitutional law, government reform and racial justice. In 2012 it helped lead the successful effort to block laws that could have made it harder for 5 million eligible citizens to vote. Waldman was Director of Speechwriting for President Bill Clinton from 1995-99, serving as Assistant to the President. He was responsible for writing or editing nearly 2,000 speeches, including four State of the Union and two Inaugural Addresses. He was Special Assistant to the President for Policy Coordination from 1993-95.

SPECIAL GUESTS

Phillip Agnew Executive Director, Dream Defenders



Phillip Agnew first came to community activism as a student at Florida A&M University School of Business and Industry. While there he served as Student Body President, a member of the University Board of Trustees and Faculty Senate. Seven years later, in response to teen Trayvon Martin being killed, Agnew formed the Dream Defenders, which brought vigor and national attention to the Martin case from the start. Dream Defenders now has chapters on nine college campuses in Florida and highlights racial and social economic-justice issues like prison privatization, racial profiling and "zero tolerance" policies in schools.

David Axelrod Director, Institute of Politics at the University of Chicago



David Axelrod is a political consultant and strategist recognized for creating a winning campaign strategy for U.S. President Barack Obama. President Obama named Axelrod as a Senior Advisor to his administration from 2009-2011 and he was a top aide to Obama's 2012 re-election campaign. Axelrod has led successful campaigns for numerous Democrats, and his client roster includes such names as Bill and

Hillary Clinton. He was formerly a political writer for the *Chicago Tribune* and is the founder of AKPD Message and Media, and operated ASK Public Strategies, now called ASGK Public Strategies. Axelrod joined NBC News and MSNBC as a senior political analyst.

Judith Browne Dianis Co-Director, Advancement Project



Judith Browne Dianis is a prominent civil rights litigator and staunch racial justice advocate in the areas of voting, education, housing, and immigrants' rights. She served as counsel in several significant voting rights cases including against the state of Florida in 2000. Under her leadership, Advancement Project has been successfully ending the overuse of suspensions and arrests in school districts across the country. Dianis has authored reports on the issue including: *Opportunities Suspended and Derailed: The Schoolhouse to Jailhouse Track*, examining the undue criminalization of students by their schools. Dianis worked tirelessly to protect survivors of Hurricane Katrina filing critical litigation to protect their rights and advocated for fair treatment of immigrant workers. Dianis joined Advancement Project after serving as the Managing Attorney in the Washington, D.C. office of the NAACP Legal Defense & Educational Fund, Inc. She was named one of the "Thirty Women to Watch" by *Essence Magazine*.

Brandon Davis National Political Director, SEIU



Brandon L. Davis is the National Political Director for the Service Employees International Union (SEIU), the nation's fastest growing union with 2.1 million members in the healthcare field, the public sector and property services. Brandon leads one of the nation's largest political programs dedicated to winning for working families, and is tasked with developing and implementing a national member focused and member driven campaign to win key 2012 elections while building permanent political infrastructure in the field that will lead to real policy change for working families in 2013 and beyond. Before becoming the National Political Director, Brandon was the Deputy National Political Director for Member Engagement at SEIU and worked diligently on SEIU's fight to win historic national healthcare reform. Brandon joined SEIU in 2007 as the Political Director for SEIU's Missouri State Council. Prior to SEIU, Brandon worked extensively on electoral campaigns, including Senator Claire McCaskill's 2006 campaign.

SPECIAL GUESTS

Lucy Flores Assemblywoman, Nevada State Assembly



Flores was elected to the Nevada State Assembly in 2010, and became vice chair of the Nevada Hispanic Legislative Caucus in 2012. She is running for Lieutenant Governor of Nevada in 2014. Flores became one of first Latina members of the Nevada Assembly. In the Assembly, Flores represents the neighborhood she grew up in. She serves on the transportation, ways and means, and legislative operations and elections committees. Flores was re-elected in 2012 without opposition and became an assistant majority whip. Flores was honored with the Excellence in Legal Clinics Award by UNLV in 2010 and the Hubbard Award by the Mexican-American Alumni Association of USC in 2007. In 2013, Flores was named a Rodel Fellow by the Aspen Institute. Flores has been affiliated with the National Association of Latino Elected and Appointed Officials, and the Stonewall Democratic Club of Southern Nevada.

Alison Lundergan Grimes Secretary of State, Kentucky Candidate for U.S. Senate



Alison Lundergan Grimes is the current Kentucky Secretary of State and is running in the Democratic primary for the 2014 United States Senate election in Kentucky. Allison was an associate attorney at Lexington's

Stoll Keenon Ogden from 2004 to 2011 before running for Secretary of State, practicing intellectual property and complex business law. She points to a domestic violence case she won for a single mother as inspiration for her political career. Named 2010 Outstanding Young Lawyer by the Fayette County Bar Association, she also served as president of the Fayette County Women Lawyers' Association and was a member of the 2008 Democratic National Committee. Grimes graduated cum laude from the Washington College of Law at American University in Washington, D.C. While at American, Grimes participated in public policy research for the National Kidney Foundation.

Larry Grisolano President and CEO, AKPD Message and Media



In 30 years as a political and advertising professional, Larry Grisolano has been at the center of some of the most important battles for the Democratic Party and for progressive ideas, and earned recognition for his management of complex advertising campaigns. Larry served as Director of Paid Media and Opinion Research for Obama for America and Obama-Biden 2008, where he directed an integrated paid advertising program that spent over \$350 million between June of 2007 and November of 2008. In 2011, Larry again served as Director of Paid Media for the Obama-Biden re-election campaign where he led an effort to develop innovative

targeting of television buys to target persuadable voters. Larry is President and CEO of AKPD Message and Media, a leading national political advertising firm founded by David Axelrod. He is a founder of Analytics Media Group, which provides advanced audience analysis and targeted planning and buying for television.

Ian Inaba Executive Director, Citizen Engagement Lab



Ian Inaba is a social entrepreneur working at the intersection of technology, media and politics. As Executive Director of Citizen Engagement Lab, he's helped the incubation and growth of various progressive advocacy organizations including Color of Change, Coworker, Demand Progress, Faithful America, Presente and Ultra Violet. He's currently working on the launch of a new incubator to assist in the creation of progressive social impact companies. As a filmmaker, Ian directed the Sundance award-winning documentary *American Blackout*, chronicling voter suppression and is currently producing a television documentary on the ongoing political battle to expand and contract the American electorate. Ian is on the board of the League of Conservation Voters Education Fund and Independent Television Service (ITVS). He was previously a Silicon Valley executive, an investment banker and is a graduate of the Wharton School of Business and the School of Engineering and Applied Science at the University of Pennsylvania.

Cecile Richards
President
Planned Parenthood Federation of America and Planned Parenthood Action Fund



Cecile Richards is president of Planned Parenthood Federation of America and Planned

Parenthood Action Fund, national organizations that work for a healthier world for women and teens. More than 700 Planned Parenthood health centers provide health care services to nearly three million people and sex education to more than one million people every year. Since joining Planned Parenthood in 2006, Ms. Richards has expanded its advocacy power and developed a unified national web presence receiving 52 million online visits annually. A frequent commentator on women's rights, reproductive health, and sex education, she is a contributor to the Huffington Post and serves on the board of the Ford Foundation.

Mark Ritchie
Secretary of State, Minnesota



Secretary of State Mark Ritchie is Minnesota's chief election officer. Ritchie is active in the National Association

of Secretaries of State, serving as president in 2011. As part of his official duties Ritchie serves on the State Executive Council; State Board of Investment; Historical Society Board; National Guard Senior Advisory Council and Minnesota's Civil War Commemoration Task Force. In the 1980s and 90s, Ritchie worked to address the economic crisis threatening family farms and rural communities as president of the Institute for Agriculture and Trade Policy and executive director of the League of Rural Voters. In 2004 Mark served as national coordinator for the November 2nd Campaign, the largest non-partisan voter registration campaigns in recent history. He ran for Secretary of State in 2006 and won. In his first two terms he has overseen three statewide recounts and successfully passed and implemented four major updates to Minnesota's election laws.

Rashad Robinson
Executive Director, ColorOfChange



Rashad Robinson serves as Executive Director of ColorOfChange, the nation's largest online civil rights organization.

Under Robinson's leadership, ColorOfChange has been at the forefront of issues ranging from fighting for justice for Trayvon Martin, to battling attempts to suppress the Black vote, to ending Pat Buchanan's tenure as an MSNBC analyst. Robinson spearheaded ColorOfChange's American Legislative Council (ALEC) national campaign. After ColorOfChange exposed ALEC's involvement in passing discriminatory voter ID and harmful Shoot First laws, over 50 corporate funders ended their financial support of ALEC.

SPECIAL GUESTS

Justine Sarver
Executive Director,
Ballot Initiative Strategy Center



Justine Sarver is the Executive Director of the Ballot Initiative Strategy Center, the progressive community's only research and capacity-building organization focused solely on ballot measures. Before joining BISC, Sarver worked as the Deputy Chief of Staff for Health and Human Services Secretary Kathleen Sebelius. Previously, she worked on President Obama's campaign as the Southwest Regional Director, overseeing campaign activities in key battleground states. Throughout her career, Sarver has been intensely involved with ballot initiative campaigns, working to defeat two parental notification measures in California. She served as the Organizing Director for the ACLU of Northern California and as Vice President of the Planned Parenthood Affiliates of California. Sarver also was the Political Director for the San Diego Labor Council, AFL-CIO. She is a graduate of the University of Michigan-Ann Arbor.

David Simas
Assistant to the President and
Deputy Senior Advisor
for Communications and Strategy,
The White House



David M. Simas currently serves as Assistant to the President and Deputy Senior Advisor for Communications and Strategy. Prior to joining the White House, Mr. Simas was the Director of Opinion Research for the Obama for America Presidential re-election campaign. He served as a Deputy Assistant to the President for Special Projects from 2010 through 2011 and as a Special Assistant to the President and aide to Senior Advisers David Plouffe and David Axelrod from 2009 through 2010. Simas previously served as Deputy Chief of Staff to Massachusetts Governor Deval Patrick and as a policy adviser to the Mayor of Taunton, MA. He was elected Register of Deeds for the Northern Bristol County, MA and to the City Council and School Committee in Taunton, MA. A Taunton Massachusetts native, Mr. Simas received a bachelor's degree with high honors from Stonehill College and received his JD from Boston College Law School.

Cristina Tzintzun
Executive Director,
Workers Defense Project



Cristina Tzintzún is the Executive Director of Workers Defense Project (WDP), a statewide, membership-based workers' rights organization that is winning better working conditions for Texans. At WDP, Tzintzún has spearheaded efforts to ensure safe and dignified jobs for the nearly 900,000 construction workers that labor in the state. WDP is supported by the Texas Future Project, founded by Democracy Alliance Partners. Her work has led to a federal investigation by OSHA into Texas' deadly construction industry, the passage a statewide wage theft law, and better, safer jobs for thousands of low-wage workers in Austin and Travis County. She has been named "Hero of the New South" by Southern Living Magazine and won the national Trabajadora Community Leader award from the National Labor Council for Latin American Advancement. Her work has been covered in the *New York Times*, National Public Radio, Univision, and *USA Today*.

DA BOARD OF DIRECTORS

Robert (Rob) L. McKay Chair



Rob is the President of the McKay Family Foundation, which supports community-based organizations

working for long-term social, political, and economic progress. Rob, along with his brother and parents, established the McKay Foundation in 1992 to bring healthcare coverage and a living wage to low-income workers. Rob's commitment to funding advocacy work has extended beyond philanthropy to include raising awareness around the issue of greater civic engagement and voter participation. Rob is also the managing partner for the McKay Investment Group, which provides venture capital for early-stage technology and consumer product companies. He serves on a number of corporate and non-profit boards, including the Ms. Foundation for Women, Salon Media Group, and Mother Jones magazine. Originally from Orange County, Rob received a B.A. in Political Science from Occidental College in Los Angeles and a Master's Degree from the University of California at Berkeley in Social and Public Policy.

Mary Kay Henry (SEIU) Vice Chair



Mary Kay serves as International President of the Service Employees International Union (SEIU), the fastest-growing

union in North America with 2.2 million workers in healthcare, public, and property services. Mary Kay joined SEIU's staff in 1979, rising to become chief healthcare strategist and International Executive Vice President in 2004. She led the union's efforts to win a stronger voice for healthcare workers and enact historic healthcare reforms. In 2010, Henry was unanimously elected International President. Mary Kay sits on the boards of the Economic Policy Institute, American Income Life, Fresh Thinking, and is an advisory member of the National Catholic Scholars for Worker Justice. She also serves on the Change to Win Leadership Council and is a founding member of SEIU's gay and lesbian Lavender Caucus. Mary Kay previously served on the executive board of Families USA and was a labor adviser to the U.S. Catholic Conference of Bishops.

Paul Egerman Treasurer



Paul is a retired software entrepreneur who previously founded two successful health information technology

companies: eScription, a company that provides dictation and transcription management and automatic speech recognition for the healthcare industry and IDX

Systems Corporation, a worldwide supplier of administrative and financial solutions for healthcare organizations. Paul is involved in several progressive political campaigns, recently serving as finance chair for Elizabeth Warren. He also cares deeply about Israel and is affiliated with progressive Israel policy groups as a member of the J Street Advisory Council and Board of Directors for the New Israel Fund. Paul holds a B.S. in Mathematics from the Massachusetts Institute of Technology.

Gara LaMarche President

David Desjardins



David is a private investor, an active philanthropist, and a supporter of many progressive groups and organizations.

David and his wife Nancy Blachman are founders of the Julia Robinson Mathematics Festival, a program of math education and enrichment for middle and high school students. A mathematician and software engineer, David was among the first 20 employees at Google, where he worked from 1999 to 2005. Since leaving Google, David continues to engage with mathematical research. David is a trustee of the University of California Berkeley Foundation, and a member of two visiting committees at MIT. David has degrees from MIT and the University of California at Berkeley. His dissertation involved the analysis of a mathematical game, with applications to information theory.

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men,

processes for Human Resource departments, currently the fastest growing software application in the human capital management sector. The Parker Group, which is focused on growing companies with resources to include a power plant in tech start-ups. Along with her business and professional activities include Cookie's on the Board of American Way, Real Estate, and Cookie has also raised funds for brain cancer research at Sinaï Medical Center, a member of Women's organization in Los Angeles served on President Obama's National Co-Chair for both 2008 and 2012. Cookie is a National Co-Chair for Obama, and is active in Organizing for People for the Medicine For Find-A-Tree. Cookie is a substantial fundraiser at Cedars-Sinai and is a member of the U.S. Olympic Committee.

Steve is an attorney and political organizer in San Francisco. He is the Chairman of Vote Hope, a federal PAC that states who champion and justice. Over the years, Steve has worked as a reformer, attorney, and journalist. Steve has written columns and in newspapers in California. In 2003, he founded C.A.A.C.org, a statewide organization working with activists to build California.

In 1992, at the age of 28, Steve successfully ran for a seat on the San Francisco Board of Education, and became the youngest elected official in the city's history. He attended Hastings College of the Law, and in 1997, began practicing civil rights and employment discrimination law. He successfully litigated against a broad number of entities ranging from municipalities to multi-million dollar corporations.

Cynthia Ryan



Cynthia is the former principal of Boston-based The Schooner Foundation, a family foundation that honors human dignity, thinks big, and acts where trustees see the greatest need and opportunities for leverage locally, nationally and globally. Cynthia is a current or former trustee of National Braille Press, Women for Women International, the Ploughshares Fund and the National Association of Health Education Centers. She is a member of the Peace & Security Funders Group, the International Human Rights Funders Group, National Network of Grantmakers, Women Waging Peace, and Grantmakers Without Borders. She serves on the Advisory Board of the Carr Center for Human Rights Policy and on the Women's Leadership Board at the John F. Kennedy School of Government at Harvard University. She was a member of the Advisory Committee of the Women's Rights Division at Human Rights Watch and a member of the Women Donors Network. Cynthia received her B.A. from the New School for Social Research in New York and a Masters of Arts from the School of Oriental & African Studies at University of London in England.

John Stocks (NEA)



John is the executive director of the National Education Association. Previously, John served as assistant executive director for public affairs at the Wisconsin Education Association Council. He also served as executive director of Idaho Fair Share, a grassroots citizen action organization dedicated to keeping utility rates affordable for working families, and spearheaded legislation on behalf of low and moderate income utility ratepayers. He currently sits on several boards, including Partnership for 21st Century Skills, and Learning First Alliance. In 1988, John ran successfully for State Senate in Idaho. His legislative record includes successfully shepherding a bill to improve protections for people facing foreclosure on their homes due to family medical crises. He established his bona fides in political strategy as chief architect of the Idaho Senate Democrats' re-election plans, securing seven new Senate seats and protecting all incumbents over three election cycles. A native of New Orleans, John is a graduate of Evergreen State College in Olympia, Washington. He and his wife, Connie, have two children.

Ted Trimpa



Ted is the Principal and President of Trimpa Group, a national political consulting and government relations firm specializing in public policy advocacy and political strategy at the state and federal levels. Ted is one of the country's most sought-after advocates resulting from his deep understanding of the national and multi-state public policy, political and nonprofit landscape. He has been recognized in national publications, including The Atlantic Monthly, National Review, The Advocate, and The Weekly Standard for his central role in designing cutting-edge public policy strategies. Prior to forming Trimpa Group, Ted was a shareholder at Hogan Lovells where he was responsible for matters before the Colorado General Assembly and had a multi-state public policy practice. Ted has orchestrated the successful passage of several public initiatives, including major social policy changes and landmark reforms to state fiscal policy. He previously served as the Director of Regulatory Affairs and Assistant General Counsel for a prominent lobbying firm in Colorado. Before attending law school, Ted served as a legislative aide for United States Senator Nancy Landon Kassebaum.

DA STAFF LEADERSHIP

Gara LaMarche President



Gara LaMarche is President of the Democracy Alliance (DA), providing overall leadership, strategic vision and management capacity for the organization. Prior to joining the Alliance, Gara served as Senior Fellow at New York University's Robert F. Wagner Graduate School of Public Service and previously, as President and CEO of the Atlantic Philanthropies. At Atlantic, he led the foundation's efforts to embrace a social justice framework for grantmaking, and spearheaded the largest-ever grant made by a foundation for an advocacy campaign - over \$25 million to press for comprehensive health care reform in the U.S. Before joining Atlantic in 2007, Gara served as Vice President and Director of U.S. Programs for the Open Society Foundations (OSF), launching the organization's pivotal work on challenges to social justice and democracy in the United States. A longtime advocate for human rights at home and abroad, he has held various positions with Human Rights Watch, PEN American Center, and the American Civil Liberties Union (ACLU). Gara is a frequent commentator on progressive issues in the news, and is the author of numerous articles on human rights and social justice issues, which have appeared in the New York Times, Washington Post, Financial Times, The Nation, and American Prospect, among many others. He has taught courses on philanthropy, public policy, and

non-profit leadership at NYU's Wagner School, as well as courses at the New School University and the John Jay College of Criminal Justice. A Westerly, Rhode Island, native, he is a graduate of Columbia College at Columbia University in New York.

Julie Kohler Manager Director



As Executive Vice President, Julie Kohler is the principal deputy of the Democracy Alliance, overseeing operations, ensuring synergy between the Investment and Partner Services divisions, and leading the organization's Investment Services Team. Kohler brings to the DA over a decade of experience in philanthropy, with deep expertise in civic engagement, state infrastructure, policy/advocacy, and social innovation grant making. Prior to joining DA, Kohler served as Director for Education & Civic Engagement at Public Interest Projects, where she managed four funding collaboratives designed to promote stronger participatory democracy and more equitable public schools. She also directed the John S. and James L. Knight Foundation's National Venture Fund, which invested \$13 million annually in civic engagement and social venture projects, and taught at the University of Maryland. Kohler holds a M.A. and Ph.D. in family social science from the University of Minnesota.

Caitlin Blair Recruitment Manager, Partner Services



Caitlin Blair is the recruitment manager within the Partner Services team at the Democracy Alliance. Blair joined the DA after spending five years on the campaign trail. Most recently she worked as the finance director for Aneesh Chopra, former U.S. Chief Technology Officer and candidate for Lt. Governor of Virginia. Previously, Blair worked as a regional finance director on the successful campaign of U.S. Senator Tim Kaine (D-VA). Blair also worked for HM Consulting in Washington, DC as a fundraising consultant on the successful 2010 campaign of Sen. Michael Bennet (D-CO) and CHC BOLD PAC, a PAC dedicated to electing members to Congress who will add diversity to our leadership and who will address issues that impact the Hispanic community in the United States. Blair began her political career as an intern for U.S. Senator Mark Warner (D-VA) on his successful 2008 campaign. Blair graduated from Dickinson College with a degree in political science. Blair is a Virginia native who now lives in Washington, DC.

Kelly Craighead
Senior Advisor



Kelly Craighead serves as Senior Advisor to the Democracy Alliance. As a member of the founding

management team, she has helped provide the leadership, strategic vision, and management capacity necessary to grow the DA into one of the largest drivers of progressive activist support for institutions that strengthen democracy and build the overall capacity of the progressive movement. Prior to joining the DA on a full-time basis, Craighead consulted with new organizations, including Media Matters for America and the Democracy Alliance, bringing them hands-on operations, positioning, communications, financial management, fundraising, program development and best practices expertise. Craighead also has worked for former Secretary of State Hillary Clinton, during both her tenure as First Lady and later at her leadership PAC after she was elected to the United States Senate. In the White House, with the rank of Deputy Assistant to the President, Craighead was the Director of Special Projects and managed special domestic and international initiatives on behalf of the President and First Lady. Craighead lives with her family in Washington, DC.

Dominic Lowell
Vice President,
Investment Services



Dominic Lowell is responsible for leading all of the Democracy Alliance's progress monitoring and investment

research - setting rigorous benchmarks for all recommended organizations and conducting extensive due diligence on APOs' progress toward those mutually agreed-upon goals. In his tenure at the DA, Lowell has written rigorous progress monitoring reports on the organizational and financial health, as well as the programmatic and political impact, of over 40 progressive organizations across three different portfolios cycles. Lowell has managed relationships with organizational leaders and key stakeholders within the movement, and he has conducted research on demographic, technological, and political trends (in both conservative and progressive movements), in order to generate timely briefings and updates for DA Partners. Recently, he led the DA's efforts to engage scores of organizations as part of its new approach to recognize and track the work and impact of the broader progressive infrastructure. Lowell is a native of Salt Lake City, Utah, though his heart now belongs to Washington, DC, where he enjoys cycling, trivia, and far too many political blogs. He is a graduate of Swarthmore College where he earned a B.A. in Sociology/Anthropology.

Jenna Narayanan
Vice President,
Partner Services and Recruitment



Jenna Narayanan comes to the Democracy Alliance with ten years' experience in development and politics. Before

joining the DA, Narayanan was the Vice President of Development and Strategic Partnerships at NDN. Prior to leading the fundraising operation for NDN, Narayanan was the Director of Development at Democracia USA. Narayanan was also the Mid-Atlantic and Southern Finance Director for the Edwards for President Campaign, where she focused on Ohio, Pennsylvania, Virginia, Alabama, Georgia and Louisiana. Narayanan has also worked for Swanson Consulting in Washington DC as a strategic fundraising consultant on federal and non-federal campaigns across the nation. During this time she raised money on a wide variety of clients that included the American Association for Justice, the Human Rights Campaign, and People for the American Way. Additionally, Narayanan raised money for John Edwards' One America Committee and the Center for Promise and Opportunity.

DA STAFF LEADERSHIP

Ryan R. Rodriguez Vice President, Partner Services



Ryan Rodriguez is responsible for coordinating the Democracy Alliance's semi-annual conferences, regional events, and other Partner engagement activities. Prior to joining the DA, Rodriguez was the National Events Manager for EMILY's List, where he organized their national conferences, their annual DC luncheon, and a variety of other fundraising events around the country. Rodriguez has a diverse events and development background. He has worked as the finance director and on the finance staff for a number of congressional races including Gwen Moore (WI-04, the first African American elected to the U.S. House from Wisconsin), Eleanor Jordan (KY-03), and Christine Jennings (FL-13). Before getting his start in politics, Rodriguez spent several years at the Smithsonian Institution where he secured corporate sponsorships, helped build the endowment, and organized opening receptions nationwide for the Smithsonian's traveling exhibition service. Rodriguez studied politics, computer information systems, and applied physics and has a B.A. in Political Science from the American University. Rodriguez is a native of Wisconsin and enjoys reading presidential biographies and historical non-fiction about the War of 1812, when he is not on his bike or yoga mat.

Frank Smith Political Director



Frank Smith serves as the de-facto political director of the Democracy Alliance and has been involved in political and public policy issues throughout his career. He is President of a Cambridge, Massachusetts consulting firm specializing in election and non-profit law and policy work. He has served as an Assistant District Attorney in Boston and worked on a number of political campaigns, including two Presidential elections. He is co-author of a recent book on the American healthcare system and writes a monthly newsletter on American politics. He is a graduate of Georgetown University and Boston College Law School, and a member of the Massachusetts Bar. He has served on a number of non-governmental organization boards.

Rob Stein Founder Emeritus



Rob Stein is Founder of the Democracy Alliance and Co-Founder of the Committee on States. An attorney by training, Rob has founded and run several non-profit organizations (1979-1988); was Strategic Advisor to the Chairman, Democratic National Committee (1989-1992); was Chief of Staff of the Washington Office of the Clinton-Gore Transition (1992); served as chief of Staff of the United States Department of Commerce (1993-1995), and was a private equity investor working with dozens of early-stage companies (1996-2002). Rob's original, comprehensive research (2003-2004) about the funding, management and overall infrastructure of the conservative movement over the last three decades led to the formation of the Democracy Alliance.



MEMBERSHIP BENEFITS AND PARTICIPATION OPTIONS

Members, aka Partners, in the Democracy Alliance (DA) have access to a set of benefits and services that are only available through this innovative partnership, including unique investment, networking, and community building opportunities, and a chance to explore in-depth the issues that will define the progressive agenda for the 21st century. Through participation in the DA, Partners gain a strategic perspective of the political landscape and increase the impact of their progressive philanthropy.

GOVERNING PARTNERS	
PRODUCTS & SERVICES	<ul style="list-style-type: none"> Attend TWO conferences per year Eligible to participate in organizational governance (ability to vote for and serve on the Board of Directors, and on Dynamic Investment or Fund Advisory Boards) Nominate TWO organizations annually for inclusion on the DA Progressive Infrastructure Map (MAP) Personal Staff Advisor Access to Partner and Subscriber only website
ANNUAL DUES <small>(personal or corporate accounts, not tax deductible)</small>	<ul style="list-style-type: none"> Individual: \$30,000 Institutional or Family: \$60,000
TOTAL ANNUAL CONTRIBUTION*	<p>Total Governing Partner contribution consists of Alliance dues + contributions to the Aligned Network and organizations recognized on the Progressive Infrastructure Map.</p> <ul style="list-style-type: none"> Individual: \$200,000 Family: \$1,000,000 Institution: \$1,000,000
MEMBERS/VOTES <small>(to elect Board of Directors)</small>	<ul style="list-style-type: none"> Individual: 1-2 members from single household/2 votes Family: Up to 3 households/6 votes Institution: 3 funding decision makers/6 votes

* Partners determine which organizations they would like to support, and at what level, and make their contributions directly to the organizations - complying with all legal disclosure requirements.
Note: Contributions to recognized organizations are not expected in the first year.

FOUNDATION SUBSCRIBER	
PRODUCTS & SERVICES	<ul style="list-style-type: none"> Investment Recommendations Progress Monitoring, and Evaluation Attend semi-annual DA conferences Personal Staff Advisor Access to Partner and Subscriber only website
FEES	<ul style="list-style-type: none"> Subscriber: \$20,000 Conference Registration: \$5,000 per conference (2 attendees)

Foundations may pay a fee for services and become a DA Subscriber. Any foundation that purchases the investment work is also able to attend the DA conferences for a fee. Conferences cannot be purchased separately. It is our expectation that foundations will utilize the investment recommendations and research to inform their philanthropy and that each foundation will strive to grant at least \$200,000 to organizations recommended by the DA.

DIRECTORY FOR PARTNERS

PARTNER ADDENDUM APRIL 9, 2014

INDIVIDUAL PARTNERS

J. ADAM ABRAM



Chapel Hill, N.C.
919-929-6292 (h)
jaabram@gmail.com

Adam is Chairman, Franklin Holdings (Bermuda) Ltd., Hamilton, Bermuda and Chairman of James River Group, Inc. He is Chairman of Piedmont Community Bank Holdings, Inc., a federally-chartered bank holding company he founded in 2009. Adam also serves as Chairman of Crescent Financial Corporation, which is controlled by Piedmont.

Adam served as CEO and director of James River Group, Inc., a NASDAQ-listed company, from its inception in 2002 until its sale to Franklin Holdings in December 2007. In 1992, Adam founded Front Royal, Inc., an insurance holding company for which he served as CEO until it was sold in 2001. Prior to founding Front Royal, Inc., Adam founded and served as President of Adaron Group, Inc., a developer of approximately 4 million square feet of commercial property in North Carolina. Adam serves or has served on the board of Human Rights First; the board of directors of the North Carolina Housing Finance Agency; the North Carolina Economic Development Board; the board of the Self-Help Credit Union Venture Fund; the board of the Triangle Land Conservancy; the board of advisors for WUNC Public Radio; the board of the Urban Institute; and the Board of Visitors of the Sanford School of Public Policy at Duke University.

Adam is a 1978 graduate of Harvard University, where he received a bachelor's degree in history. He is married to Rosalind Abram, who is a psychologist in Chapel Hill, N.C.

PAUL BOSKIND



San Antonio, Texas

Paul is founder and chief executive officer of Deer Oaks, a behavioral health organization headquartered in San Antonio with offices in 17 states and the largest private employer of psychologists in Texas.

Established in 1992, Deer Oaks has grown into a thriving stand-alone provider of high-quality employee assistance, work-life, and wellness services. Deer Oaks currently serves approximately one million employees and their dependents across more than 500 private and public employer groups throughout the nation.

Paul is a gay rights activist and was recognized by the Human Rights Campaign (HRC) in 2011 for his work. He serves on the board of directors for Servicemembers Legal Defense Network and Equality Texas. He is a major donor with the HRC, the Gay and Lesbian Victory Fund, Point Foundation, Faith In America, GenderPAC and the Michael Palm Center, as well as the Democratic National Committee.

In addition to Deer Oaks, Paul discovered the power of using the theatrical arts to inspire, educate and touch lives on issues of equal rights for the GLBT community, prompting him to expand his interest to New York. Boskind has won a Tony Award for Best Revival of a Play as one of the producers of Larry Kramer's ground-breaking AIDS drama, "The Normal Heart."

AMY GOLDMAN FOWLER



Rhinebeck, New York

Amy is a gardener, author, artist, philanthropist and advocate for seed saving, and heirloom fruits and vegetables. She is one of the foremost heirloom plant conservationists in the United States. Goldman is described as "perhaps the world's premier vegetable gardener" by Gregory Long, President of The New York Botanical Garden.

Since 2007, Amy has served as the Board Chair of Seed Savers Exchange, a nonprofit organization dedicated to preserving heirloom plant varieties. Amy also sits on the Board of the New York Botanical Garden, and was appointed in 2003 to the Board of Trustees of the New York Restoration Project, a nonprofit organization bringing life back to the community parks and gardens of New York City through restoration and revitalization efforts.

In addition to her leadership of the Amy P. Goldman Foundation, Amy is a trustee of the Lillian Goldman Charitable Trust, established in 1995. The Lillian Goldman Charitable Trust supports various agricultural research and preservation efforts, medical research and higher education. Amy has served as Executive Director of the Sol Goldman Charitable Trust of New York City. In May 2011, Amy P. Goldman was elected Vice Chairman of the Board of Directors of the Center for Jewish History. The Center for Jewish History is one of the foremost Jewish research and cultural institutions in the world, having served over 1 million people in more than 100 countries. Amy is married to Cary Fowler.

YOLANDA "COOKIE" PARKER



Member, Democracy Alliance Board of Directors
Los Angeles, California
(323) 935-5300 (w)
cookie@cookieparker.com

Cookie was the founder and President of KMS Software Company which specialized in software for Human Resources Departments. A visionary and authority in process automation; Parker began her career over 40 years ago with IBM. After leaving IBM, she continued her professional career as a Director at CGS and Vice President of Sales and Operations at NCS and CPR, before starting her own firm in 1994. She recently started The Parker Group, which is focused on matching companies with resources needed for success. Her current projects include a power plant in Ghana and two tech start-ups.

Along with her business and professional accomplishments, Cookie's philanthropic activities include memberships on the Board of People for the American Way, Real Medicine Foundation, and Find-A-Tree. Cookie has also raised substantial funds for brain cancer research at Cedars-Sinai Medical Center; and is a member of Women Presidents' Organization in Los Angeles. Cookie served on President Obama's National Finance Committee for both 2008 and 2012 campaigns; was a National Co-Chair for Technology for Obama, and is now working with Organizing for Action.

An entrepreneur, community and political activist, Cookie is married to Fred Parker and is the mother of two. She received her BA and MA from New York University.

RICHARD SEGAL



Rye, New York
 (914) 683-8474 (w)
 rsegal@seavestinc.com

Rick is the founder and Chief Executive Officer of Seavest, Inc., a private investment management firm primarily focused on real estate and private equity investing. The firm has significant investments in health care real estate and growth-stage companies in the education, healthcare and consumer technology sectors.

In his work outside, Rick is the Chairman of the Board of the Association of Hole in the Wall Camps, an international camp-based program established by actor Paul Newman to create positive recreational experiences for children with serious illnesses. He is also President of the A.L. Mailman Family Foundation, a charitable foundation focused on early childhood care and education. Rick is Founding Chairman Emeritus of Public Color, Inc., a not-for-profit arts and education institution serving the needs of the most challenged New York City Public Schools. A Trustee Emeritus of the Big Apple Circus where he led the effort to create the Clown Care Program, an outreach program which serves many of the nation's pre-eminent Children's Hospitals. Rick also serves on the Board of Trustees of New York Presbyterian Hospital where he is a member of the Investment Committee as well as the Real Assets Sub-committee and is a Trustee of the Whitney Museum of American Art, serving on the Finance Committee.

Rick lives in Rye, New York with his wife, Monica.

TOM STEYER



San Francisco, California

Tom is an investor, philanthropist and advanced energy advocate. He is also the President of NextGen Climate Action, an organization that acts politically to avert climate disaster and preserve American prosperity. Before retiring from the private sector, he founded and was the Senior Managing Member of Farallon Capital Management. He also was a Managing Director and member of the Investment Committee at Hellman & Friedman. An avid Californian, Tom has worked to promote economic development and environmental protection in the state.

Tom and his wife, Kat Taylor, have joined the "Giving Pledge," promising to donate the majority of their wealth to charitable and nonprofit activities during their lifetimes. He and Kat created the Oakland-based One PacificCoast Bank and Foundation, which provides loans and banking services to underserved small businesses, communities, and individuals. At Stanford University, Tom serves on the Board of Trustees as Vice-Chair, and three years ago he and Kat founded two renewable energy research institutions there: the TomKat Center for Sustainable Energy and the Steyer-Taylor Center for Energy Policy and Finance. Tom founded Advanced Energy Economy to advance policy in the clean energy sector, Next Generation, which addresses climate and family policy. Tom served as a delegate to the Democratic National Conventions in 2004 and 2008 and is a board member of the Center for American Progress.

Tom graduated Summa Cum Laude and Phi Beta Kappa from Yale and received his MBA from Stanford's Graduate School of Business. Tom and Kat have four children.

HENRY VAN AMERINGEN



New York, New York
(212) 758-6221 (w)

Henry serves on the board of the van Ameringen Foundation, a family foundation that deals with mental health and mental illness in the New York and Philadelphia metropolitan areas. He is also President of the H. van Ameringen Foundation, a personal foundation that concentrates on HIV/AIDS and LGBT issues, mostly in New York City.

Henry retired from International Flavors and Fragrances (IFF) as European Vice-President in charge of fragrance marketing. He serves on the board of Fountain House, where people with mental illnesses can find a job, a clubhouse, and friends. He previously served as co-chair of the Board of Directors of In The Life Media, the award-winning nationally televised newsmagazine about LGBT people. In addition to LGBT, HIV, and mental health, Henry funds around reproductive justice, prison reform, and marijuana legalization.

Henry is a graduate of the Georgetown School of Foreign Service.

INSTITUTIONAL PARTNERS

AMERICAN FEDERATION OF TEACHERS



Randi Weingarten

President

Washington, District of Columbia
rweingarten@aft.org

Randi is president of the 1.5 million-member American Federation of Teachers, AFL-CIO. Prior to her election as AFT president in 2008, Weingarten served for 12 years as president of the United Federation of Teachers, AFT Local 2, in New York City.

In 2012-13, Randi served on an education reform commission convened by New York Gov. Andrew Cuomo, which made a series of recommendations to improve teaching and learning. She was appointed to the Equity and Excellence Commission, a federal advisory committee chartered by Congress to examine and make recommendations concerning the disparities in educational opportunities that give rise to the achievement gap. For 10 years, while president of the UFT, Randi chaired New York City's Municipal Labor Committee, an umbrella organization for the city's 100-plus public sector unions, including those representing higher education and other public service employees.

Randi holds degrees from Cornell University's School of Industrial and Labor Relations and the Cardozo School of Law. She worked as a lawyer for the Wall Street firm of Stroock & Stroock & Lavan from 1983 to 1986. She is an active member of the Democratic National Committee and numerous professional, civic and philanthropic organizations. Born in 1957 and raised in Rockland County, N.Y., Randi now resides on Long Island and in Washington, D.C.



Michelle Ringuette

*Assistant to the President for
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Michelle is an experienced strategist and campaigner who oversees politics, government relations and moving a progressive agenda for the American Federation of Teachers. Her background includes both domestic and international advocacy and strategic communications in labor, corporate accountability, women's rights, social justice, economic rights, educational and political campaigns.

Most recently, Michelle served as the Chief of Campaigns and Programs at Amnesty International USA. Previously, she was a member of SEIU's senior leadership team, and she played a key role in the 2008 presidential election, the Obama healthcare debate and the ongoing legislative fights in battleground states. In 2011, Michelle co-founded the ALECExposed Network, which aligned multiple groups' efforts to unveil the American Legislative Exchange Council's voter suppression efforts and its role in advancing state legislation to benefit its corporate members.

Michelle holds degrees in English and Philosophy from Boston College, and she conducted graduate work in psychology at Harvard University. She and her partner live with their 6 year-old son in Washington, D.C.

FOUNDATION REPRESENTATIVES

GILL FOUNDATION



Courtney Cuff

CEO

Denver, Colorado
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Courtney is President and CEO of the Gill Foundation. In this role, Courtney leads the foundation in executing the vision of Tim Gill and the board through prioritizing, implementing, and measuring the work and grantmaking of the foundation.

A respected leader with a strong record of accomplishment over her 20-year career in the nonprofit sector, Courtney most recently served as CEO of the Denver-based Western Conser-

vation Foundation. Previously, Courtney served as a strategic consultant to several private foundations and as Director for the Pacific Regional Office of the National Parks Conservation Association in California. She was also Legislative Director for Friends of the Earth in Washington, D.C.

A native of Georgia, Courtney graduated cum laude with a bachelor's degree in sociology from Wake Forest University in Winston-Salem, North Carolina, where she was a scholarship athlete competing in golf. She completed an MBA executive course on social entrepreneurship at Stanford University. Courtney lives in Denver with her wife, Jessica Newman.

NEW WORLD FOUNDATION



Colin Greer

President

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Colin has been the President of the New World Foundation since 1985. Formerly a Professor at Brooklyn College, CUNY, Colin participated in and directed several studies of US Immigration and urban schooling policy and history at Columbia University and CUNY. He wrote briefing papers on philanthropy and government for First Lady Hillary Clinton and on education policy for Senator Paul Wellstone. He chaired the President's White House Internship Financial Aid Committee (1992-4) and chaired the Funders Committee for Citizen Participation for 10 years.

Colin serves on the Boards of the Center for Social Inclusion, Philanthropy For Active Civic Engagement (PACE), Teachers and Writers Collaborative (NYC), openDemocracyUSA (US/UK), and several arts and faith-based organizations in both New York City and California.

Colin was a founding editor of *Change* magazine and *Social Policy* magazine and is a contributing editor to *Parade* magazine. He is the author of several books, including *The Great School Legend* and *Choosing Equality: The Case for Democratic Schooling* (which won the American Library Association's Eli M. Oboler Intellectual Freedom Award), *The Plain Truth of Things*, and *A Call to Character* (co-written with Herbert Kohl). Colin is the author of plays about Rabbi Joshua Heschel and the Civil Rights era about Spinoza, both produced in NYC and Washington DC. Recently, his "Imagining Heschel" opened The President's Interfaith and Community service Campus Challenge Conference at Georgetown University.

TIDES FOUNDATION



Kriss Deiglmeler

CEO

San Francisco, California

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Kriss is the CEO of Tides. She is recognized as a pioneer in the social innovation field and most recently was the founding Executive Director for the Center for Social Innovation (CSI) at Stanford University in Palo Alto. For the past ten years she established CSI as a global leader in the emerging social innovation field. Kriss has more than 20 years of senior management experience that spans the social enterprise, business, nonprofit, and philanthropic sectors.

Kriss has presented nationally and internationally on social innovation, corporate social responsibility, social entrepreneurship and public-private partnerships, as well as guest-lectured at the Stanford Graduate School of Business, University of California, Berkeley, and various Japanese Universities. She has co-authored a number of articles, with her most recent entitled "Rediscovering Social Innovation."

COMMUNICATION WORKERS OF AMERICA



Larry Cohen

President

Washington, District of Columbia
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Larry was elected president of the Communications Workers of America in 2005, after serving as Executive Vice President for seven years. Larry has promoted reform inside CWA and beyond. Under Larry's leadership, convention delegates approved a measure to add the voices of local union leaders to the union's executive board, to broaden diversity of board membership and to expand the important perspective of local leaders to the union's leadership.

Throughout his career, Larry has led major contract negotiations in both the public and private sectors. Cohen was one of the first to recognize changes in telecommunications through the convergence of video, voice and data technologies, and the need to unify unionized workers in these sectors. He also has worked to expand CWA - the union now represents workers in information technology and communications; print and broadcast media and publishing; health care, education and public workers; manufacturing and the airline industry.

Based on his long-held belief that unions must unite with other like-minded groups to further goals of economic justice, Larry founded Jobs with Justice in 1987. He is also a founder of American Rights at Work, and a member of the Democratic National Committee.



George Kohl

Senior Director for Policy

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George is currently a Senior Director for the Communications Workers of America (CWA). He oversees research policy development plus CWA's legislative program. George has been a key participant in the CWA's work to Fix the Senate Now and the Democracy Initiative.

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Constituent Name	First Name	Last Name	DA Status	Conference status	Proposed Confernece Friend	Proposed Additional Conference Friend	Proposed First Year Mentor	Proposed Welcome Cocktail Presenter	Attending Welcome Cocktails
Abram Adam	Adam	Abram	New Partner 2014	registered	Joe Zimlich	Doug Phelps	Anne Bartley	Anne Bartley	yes
Abram Adam	Jay	Reiff	Advisor	registered	n/a		n/a		yes
Amalgamated Bank	Noel	Beasley	New Partner 2014	registered	Mary Kay Henry		John Stocks	John Stocks	yes
Amalgamated Bank	Keith	Mestrich	New Partner 2014	registered	Mary Kay Henry		John Stocks	John Stocks	yes
Munger Philip	Philip	Munger	New Partner 2014	registered	Ian Simmons		Ian Simmons	Ian Simmons	yes
New World Foundation	Colin	Greer	New Partner 2014	not attending	n/a		John Stocks	n/a	no
New World Foundation	Heeten	Kalan	New Partner 2014	registered	Guillermo Quinteros		n/a	John Stocks	no
Segal	Rick	Segal	New Partner 2014	not attending	n/a		Paul Egerman	Paul Egerman	no
Smith Ryan	Ryan	Smith	New Partner 2014	registered	Paul Rudd		Weston Milliken	Ian Simmons	no
van Ameringen Henry	Henry	van Ameringen	New Partner 2014	registered	Ted Trimpa		Weston Milliken	Ted Trimpa	yes
van Ameringen Henry	Chris	Cormier	Advisor	registered	Weston Milliken		n/a		yes
Wiggins Dirk	Dirk	Wiggins	New Partner 2014	registered	Paul Rudd	Emily Sussman	Ian Simmons	Jim Gollin	yes
Arcus Foundation	Jason	McGill	Committed	registered	Ted Trimpa				
Findlater Jeanne	Jeanne	Findlater	Committed	registered	Cynthia Ryan		Chris Findlater	Chris Findlater	
Rockefeller Family Fund	Lisa	Guide	Committed	registered	Anne Bartley		Anne Bartley	Anne Bartley	
Rockefeller Family Fund	Lee	Wasserman	Committed	registered	Bill Roberts		Anne Bartley	Anne Bartley	
Arca Foundation	Anna	Lefer Kuhn	Sneak Peek	registered	Kathleen Welch				
Eychaner Fred	Dave	Horwich	Sneak Peek	registered	John Stocks				
Falk Joesph	Joseph	Falk	Sneak Peek	registered	Weston Milliken	Chris Findlater			
Freeman William	Bill	Freeman	Sneak Peek	maybe	Lou Frillman				
Lear Norman	Lara	Bergthold	Sneak Peek	registered	Marcy Carsey				
McNeil Rogers Sandra	Sandra	McNeil Rogers	Sneak Peek	maybe	Lou Frillman				
Solow Alan	Alan	Solow	Sneak Peek	registered	Lou Frillman				
vanden Heuvel Katrina	Katrina	vanden Heuvel	Sneak Peek	registered	Rob McKay	Jim Gollin			
Wyss	Anna	Fink	Sneak Peek	registered	Alexandra Russell				
Atkinson John	John	Atkinson	Convening	registered	Lou Frillman				
Conlon Kevin	Kevin	Conlon	Convening	registered	Lou Frillman				
Davidson Joan	Joan	Davidson	Convening	registered	Cynthia Ryan				
Cream City Foundation	Paul	Fairchild	Convening	registered	Anne Summers	Linda Honold			
Ettinger Christian	Christian	Ettinger	Convening	registered	Jim Gollin	Alan Davis			
Glovsky Bob	Bob (OFA)	Glovsky	Convening	registered	Lou Frillman				
Hildreth Daniel	Daniel	Hildreth	Convening	registered	Ian Simmons	Donald Sussman			
Jacobson Susan	Susan	Jacobson	Convening	registered	Cynthia Ryan				
Pelosky Mahsa	Mahsa	Pelosky	Convening	registered	Cynthia Ryan				
UFCW	Nikki	Budzinski	Convening	registered	Cristina Uribe				
Boskind Paul	Paul	Boskind	New Partner 2013	registered			Weston Milliken		
CWA	Larry	Cohen	New Partner 2013	registered			John Stocks		
AFT	Randi	Weingarten	New Partner 2013	registered			Mary Kay Henry		
CWA	George	Kohl	New Partner 2013	registered			Paul Booth		
AFT	Michelle	Ringuette	New Partner 2013	registered			Karen White		
Goldman Amy	Amy	Goldman	New Partner 2013	not attending			Quinn Delaney		
SEIU	Maddy	Melton	New Union Participant	not attending				Mary Kay Henry	
Tides Foundation	Kriss	Deiglmeier	New Foundation Participant	not attending				Rob McKay	
Gill Foundation	Courtney	Cuff	New Foundation Participant	not attending				Ted Trimpa	

