

# Capital Pathway Strategy — SAMPLE

Maria Santos for Congress — CD-12 Democratic Primary

DFX Intelligence

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## Capital Pathway Strategy — Maria Santos for Congress

**SAMPLE DOCUMENT** — This report uses entirely fictional / synthetic data to demonstrate DFX Intelligence deliverable format and methodology. No real individuals, donors, or campaigns are represented. "Maria Santos," "David Park," "Thomas Hargrove," and all associated names, organizations, and data points are entirely fictional.

This Capital Pathway Strategy maps **Maria Santos's** policy positions to economic impact, identifies the donor segments most likely to fund her campaign, and delivers a sequenced fundraising plan for the **CD-12 Democratic Primary (August 2026)**.

**Candidate:** Maria Santos, State Representative (D-Riverside), District 14 — 6 years in office. Former public defender. Daughter of immigrants. Known for criminal justice reform, affordable housing, and workers' rights.

**Race:** U.S. House, 12th Congressional District (open seat). Primary: August 2026.

### Opponents:

CANDIDATE	PROFILE	FUNDING	KEY VULNERABILITY
<b>David Park</b>	Former Deputy Assistant Secretary, Commerce Dept. DC establishment candidate.	\$2.8M raised; heavy national-donor base	Out-of-district money; no local roots narrative
<b>Thomas Hargrove</b>	Tech entrepreneur; venture capital	~\$1.5M (largely self-funded)	Defense + fossil fuel holdings; "buying the

CANDIDATE	PROFILE	FUNDING	KEY VULNERABILITY
	connections		seat" frame

## PHASE 1 — POLICY TO ECONOMIC IMPACT MAPPING

**Methodology:** Each of Santos's core policy positions is mapped to the industries and economic sectors that benefit or face risk. Confidence reflects the strength of the causal link between the policy position and the economic impact.

POLICY AREA	SANTOS POSITION	INDUSTRIES THAT BENEFIT	INDUSTRIES AT RISK	CONFIDENCE
<b>Criminal justice reform</b>	End cash bail; expand public defense funding; diversion programs for nonviolent offenders	Community health services, reentry nonprofits, behavioral health providers, municipal budgets (reduced incarceration costs)	Private prison operators, bail bond industry, for-profit diversion programs	HIGH
<b>Affordable housing</b>	Expand LIHTC, inclusionary zoning mandates, community land trusts, first-time buyer down payment assistance	Affordable housing developers, CDFIs, community land trusts, construction trades, building materials suppliers	Market-rate luxury developers (margin compression), short-term rental platforms (regulatory risk)	HIGH
<b>Workers' rights / labor</b>	\$18 federal minimum wage, card-check neutrality, gig	Unions (building trades, service, healthcare), childcare	Gig economy platforms, franchise operators, low-	HIGH

POLICY AREA	SANTOS POSITION	INDUSTRIES THAT BENEFIT	INDUSTRIES AT RISK	CONFIDENCE
	worker classification, paid family leave mandate	providers, domestic manufacturers	wage service chains	
<b>Clean energy / climate</b>	100% clean grid by 2040, EV infrastructure investment, environmental justice in permitting	Solar/wind manufacturers, EV charging companies, battery storage, environmental engineering firms	Fossil fuel extraction, natural gas utilities, petrochemical manufacturing	HIGH
<b>Healthcare access</b>	Public option, prescription drug pricing reform, community health center expansion	Community health centers, generic drug manufacturers, telehealth platforms, nurse practitioners	Brand-name pharma (pricing pressure), private insurance carriers (market share risk), PBMs	MEDIUM-HIGH
<b>Higher education / workforce</b>	Tuition-free community college, Pell Grant expansion, STEM apprenticeship programs	Community colleges, workforce development orgs, STEM training providers, employers in skilled-trade sectors	For-profit colleges (enrollment competition), private student lenders (reduced demand)	MEDIUM
<b>Immigration reform</b>	Pathway to citizenship, DACA protections, expanded visa programs for healthcare and agriculture workers	Agriculture, healthcare (staffing), hospitality, food processing, immigration legal services	No direct industry risk; political risk from enforcement-first donors	MEDIUM

## Phase 1 Summary

Santos's policy portfolio creates a **clear capital logic** across five high-yield sectors: (1) labor and building trades, (2) clean energy, (3) affordable housing / CDFI, (4) healthcare

access, and (5) higher education / workforce. These sectors contain organizations, executives, and PACs with demonstrated giving patterns in Democratic primaries. The criminal justice and immigration positions are strong mobilization tools for small-dollar and affinity-group fundraising but carry lower direct economic-impact donor yield.

## PHASE 2 — INDUSTRY TO COMPANY IDENTIFICATION

**Methodology:** For each high-yield industry, we identify companies and organizations in CD-12 and nationally that stand to benefit from, be put at risk by, or remain neutral toward Santos’s platform. Local entities are prioritized — their executives and employees are the highest-probability donors.

### 2A. Clean Energy & Environmental Services

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
Verdant Solar Partners	Solar dev/install	Riverside (CD-12)	<b>Beneficiary</b>	140 employees; CEO active in local Dem politics
Lakeshore Wind Holdings	Wind energy developer	National; project office in CD-12	<b>Beneficiary</b>	Building 200MW wind farm in adjacent county
Great Plains Battery Co.	Battery storage mfg	Millbrook (CD-12)	<b>Beneficiary</b>	Recent \$40M facility expansion; 300 jobs
MidAmerica Natural Gas Corp.	Gas utility	Regional; serves CD-12	<b>At-Risk</b>	Santos’s 100% clean grid target threatens core business model

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
Apex Environmental Engineering	Environmental consulting	Riverside (CD-12)	<b>Beneficiary</b>	Permitting and remediation; benefits from environmental justice provisions

## 2B. Healthcare & Community Health

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
Riverside Community Health Center	FQHC	Riverside (CD-12)	<b>Beneficiary</b>	Largest FQHC in district; public option + CHC expansion = direct funding increase
ClearPath Telehealth Inc.	Telehealth platform	National; engineering team in Riverside	<b>Beneficiary</b>	Expanded coverage = expanded patient pool
GeneriCure Pharmaceuticals	Generic drug mfg	Millbrook (CD-12)	<b>Beneficiary</b>	Drug pricing reform advantages generics over brand-name
Pinnacle Health Insurance Group	Private insurer	Regional; major employer in CD-12	<b>At-Risk</b>	Public option creates competitive pressure
Crestview Medical Systems	Hospital network	CD-12 (3 facilities)	<b>Neutral</b>	Benefits from expanded coverage but faces reimbursement rate pressure

## 2C. Affordable Housing & Community Development

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
Keystone Community Development Corp.	CDFI / nonprofit developer	Riverside (CD-12)	<b>Beneficiary</b>	LIHTC expansion = core business growth
Lumen Homes LLC	Affordable housing developer	CD-12	<b>Beneficiary</b>	Inclusionary zoning creates protected market share
Heritage Luxury Partners	Market-rate luxury developer	Regional; active in CD-12	<b>At-Risk</b>	Inclusionary mandates compress margins
Ironworkers Local 47	Building trades union	Riverside (CD-12)	<b>Beneficiary</b>	Construction demand + prevailing wage provisions

## 2D. Higher Education & Workforce

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
Riverside State University	Public university	Riverside (CD-12)	<b>Beneficiary</b>	Pell Grant expansion increases enrollment and revenue
Millbrook Community College	Community college	Millbrook (CD-12)	<b>Beneficiary</b>	Tuition-free CC = enrollment surge
Trident Technical Institute	For-profit college	CD-12	<b>At-Risk</b>	Free CC enrollment directly competes with for-profit model
Bridgepoint Workforce Solutions	Workforce dev nonprofit	CD-12	<b>Beneficiary</b>	STEM apprenticeship funding =

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
				program expansion

## 2E. Labor & Workers' Rights

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
SEIU Local 1021	Healthcare workers' union	Regional; strong CD-12 presence	<b>Beneficiary</b>	Card-check + minimum wage = organizing leverage
IBEW Local 234	Electrical workers' union	Riverside (CD-12)	<b>Beneficiary</b>	Clean energy build-out = massive job growth for electricians
Central Valley Staffing Inc.	Gig/temp staffing	CD-12	<b>At-Risk</b>	Gig worker classification threatens business model
United Food & Commercial Workers Local 770	Retail/food workers' union	Regional	<b>Beneficiary</b>	Minimum wage + paid leave = member benefits

# PHASE 3 — CAPITAL LOGIC

**Methodology:** Capital Logic profiles explain *why* specific donor types give — the psychological and strategic drivers behind political contributions. Understanding the “why” is essential for message-matching and sequencing.

## 3.1 — The Economic Beneficiary Donor

DIMENSION	DETAIL
<b>Who</b>	Executives, founders, and investors in clean energy, affordable housing, healthcare access, and workforce development
<b>Why they give</b>	Santos's platform directly increases their revenue, market share, or regulatory position. This is rational economic behavior, not ideology.
<b>Expected behavior</b>	Will give at or near max when they believe Santos can win <i>and</i> will have committee influence. Sensitive to viability signals (endorsements, polling, fundraising momentum).
<b>Risk</b>	Transactional donors may hedge by also giving to Park or Hargrove. Require explicit committee-aspiration signaling.

### 3.2 — The Ideological Alignment Donor

DIMENSION	DETAIL
<b>Who</b>	Progressive donors motivated by criminal justice reform, immigration, housing justice, and labor rights. Includes small-dollar ActBlue donors and mid-range (\$500-\$2,900) movement donors.
<b>Why they give</b>	Deep values alignment. Santos's personal story (immigrant family, public defender) creates emotional resonance beyond policy positions.
<b>Expected behavior</b>	Early money — will give before viability is proven. High lifetime value (repeat donors). Activated by contrast with opponents (Park = DC insider, Hargrove = self-funder with fossil fuel holdings).
<b>Risk</b>	May have competing demands from other progressive candidates nationally. Requires regular narrative engagement.

### 3.3 — The Access / Influence Donor

DIMENSION	DETAIL
<b>Who</b>	Lobbyists, government affairs professionals, trade association executives, and law firm partners with clients in Santos's policy areas
<b>Why they give</b>	Invest in relationships with future members of Congress. Santos's expected committee assignments (Energy & Commerce, Education & Workforce) determine their interest.
<b>Expected behavior</b>	Late money — wait for clear front-runner signals. Give at max contribution. Expect face time and responsiveness. Often bundlers.
<b>Risk</b>	Currently hedging across all three candidates. Will not move until Santos demonstrates fundraising parity with Park.

### 3.4 — The Anti-Opponent Donor

DIMENSION	DETAIL
<b>Who</b>	Donors motivated primarily by blocking Park (seen as DC establishment coronation) or Hargrove (self-funder with problematic holdings)
<b>Why they give</b>	Defensive posture. Give to the strongest alternative. Santos benefits from being the most credible non-Park, non-Hargrove option.
<b>Expected behavior</b>	Consolidate around Santos as polling clarifies. May give late but large. Responsive to "Park is vulnerable" or "Hargrove's fossil fuel money" framing.
<b>Risk</b>	Loyalty is to outcome, not candidate. If Santos falls to third in polling, these donors evaporate.

### 3.5 — The Identity / Representation Donor

DIMENSION	DETAIL
<b>Who</b>	Donors who prioritize electing women, Latina candidates, daughters of immigrants, and former public defenders. Includes institutional

DIMENSION	DETAIL
	donors (EMILY’s List, Latino Victory Fund, Hispanic Caucus BOLD PAC).
<b>Why they give</b>	Representation matters. Santos’s candidacy is a milestone opportunity for Latina representation in Congress.
<b>Expected behavior</b>	Early validators. Institutional endorsements unlock bundling networks. Individual donors in this category are highly shareable on social media — amplify with digital storytelling.
<b>Risk</b>	Institutional endorsement processes are competitive and slow. Must apply early and demonstrate viability.

## PHASE 4 — PRIORITIZED DONOR SEGMENTS

**Methodology:** Segments ranked by (1) probability of giving to Santos specifically, (2) estimated aggregate yield, and (3) accessibility through existing networks. Check sizes are estimates for individual contributions (primary cycle max: \$3,300).

RANK	SEGMENT	WHY HIGH PROBABILITY	EST. CHECK SIZE	OUTREACH ANGLE
1	<b>Labor PACs &amp; union leadership (building trades, healthcare, service)</b>	Santos has a 100% AFL-CIO voting record; \$18 min wage and card-check are top union priorities	\$2,500-\$5,000 (PAC); \$1,000-\$3,300 (individual)	Endorsement meetings with labor council; workers’ rights legislative record as proof point
2	<b>Clean energy executives (solar, wind, battery, EV)</b>	100% clean grid by 2040 = decade of growth; Santos is the only candidate with a specific clean	\$1,000-\$3,300	Host Verdant Solar CEO-led fundraiser; emphasize Energy & Commerce

RANK	SEGMENT	WHY HIGH PROBABILITY	EST. CHECK SIZE	OUTREACH ANGLE
		energy jobs plan		committee aspiration
3	<b>EMILY's List / women's donor network</b>	Open seat with strong Latina woman candidate; EMILY's List endorsement unlocks \$200K+ in bundled contributions	\$500-\$3,300	Secure endorsement early; Santos's public defender-to-legislator arc is a signature EMILY's List story
4	<b>Latino Victory Fund + Hispanic donor network</b>	Santos would be first Latina from CD-12; immigrant family narrative resonates with national Latino donor base	\$500-\$3,300	Apply for LVF endorsement (triggers bundling program); bilingual fundraising events
5	<b>Criminal justice reform donors (foundations, advocates, attorneys)</b>	Cash bail and diversion platform aligns with national reform movement; Santos is a former public defender with lived credibility	\$500-\$2,500	Host policy roundtable with local defense bar; emphasize personal experience in the system
6	<b>Affordable housing / CDFI professionals</b>	LIHTC expansion and CLT funding directly grow their sector; Santos authored state affordable housing legislation	\$500-\$2,000	District housing tour with Keystone CDC; co-host with National Housing Conference state chapter
7	<b>Healthcare professionals (community health, nursing, telehealth)</b>	Public option + CHC expansion = jobs and funding; contrast with Park's pharmaceutical stance	\$250-\$1,500	Riverside Community Health Center visit + staff-led fundraiser; "healthcare is a

RANK	SEGMENT	WHY HIGH PROBABILITY	EST. CHECK SIZE	OUTREACH ANGLE
		and Hargrove's healthcare silence		right" messaging
8	<b>Higher ed faculty &amp; administrators (Riverside State, Millbrook CC)</b>	Tuition-free CC and Pell expansion = enrollment growth and job security; Santos is the only candidate with a workforce policy	\$250-\$1,000	Campus town hall + faculty reception; Education & Workforce committee aspiration
9	<b>Trial lawyers / plaintiffs' bar</b>	Workers' rights + consumer protection alignment; AAJ network is reliable Dem donor base	\$1,000-\$3,300	AAJ state chapter fundraiser; Santos's litigation background (public defender) creates peer credibility
10	<b>Progressive small-dollar (ActBlue)</b>	Santos's story (immigrant, public defender, housing champion) is optimized for digital fundraising; contrast ads vs. Park and Hargrove drive acquisition	\$25-\$100 (high volume)	Launch "People Over PACs" digital series; contrast Hargrove self-funding and Park DC money
11	<b>Environmental justice community orgs</b>	Santos's permitting reform and EJ provisions are unique in the field; district has legacy pollution sites	\$100-\$500	Community meeting in affected neighborhoods; Sierra Club / LCV endorsement pursuit
12	<b>Immigration attorneys &amp;</b>	Pathway to citizenship +	\$250-\$1,500	Immigration bar association

RANK	SEGMENT	WHY HIGH PROBABILITY	EST. CHECK SIZE	OUTREACH ANGLE
	<b>advocacy orgs</b>	DACA protections; Santos's personal immigrant family story		event; bilingual storytelling
13	<b>Local small business owners (district)</b>	Santos has 6 years of constituent service relationships; workforce development = talent pipeline	\$250-\$1,000	House parties hosted by supportive business owners; "she picks up the phone" testimonials
14	<b>Anti-self-funder donors (oppose Hargrove)</b>	Motivated by blocking Hargrove's fossil fuel money and self-funded campaign; Santos is the people-powered alternative	\$500-\$3,300	"This seat is not for sale" messaging; contrast Hargrove's disclosed defense and fossil fuel holdings
15	<b>National progressive bundlers (Democracy Alliance, Way to Win)</b>	Open-seat pickup opportunity with a diverse progressive candidate; national infrastructure donors watch these races	\$3,300 (bundled: \$25K-\$50K)	Personal meetings at national convenings; viability case with polling and endorsement momentum

## PHASE 5 — DISTRICT VS. FEDERAL LEVERAGE

**Methodology:** Santos is transitioning from state representative to congressional candidate. This changes the donor universe, the committee-access value proposition, and the geographic scope of fundraising. This section maps those dynamics.

## State-to-Federal Donor Dynamics

DIMENSION	STATE REP. FUNDRAISING	CONGRESSIONAL FUNDRAISING	SANTOS IMPLICATION
<b>Contribution limits</b>	\$2,000/cycle (state)	\$3,300/cycle (federal primary)	Higher ceiling unlocks larger checks from existing supporters
<b>Geographic scope</b>	District 14 only	National	Santos can now tap national progressive, Latino, and women's donor networks
<b>PAC engagement</b>	State-level PACs only	Federal PACs, leadership PACs, national unions	Labor PACs (AFSCME, SEIU, IBEW) can now give directly; endorsement-driven
<b>Committee value</b>	State committee assignments (Housing, Judiciary)	Federal committee aspirations (Energy & Commerce, Education & Workforce)	Access-driven donors activate based on federal committee prospects
<b>Bundling infrastructure</b>	Minimal	Essential	Must build bundler network from scratch; EMILY's List and LVF provide ready infrastructure
<b>Small-dollar digital</b>	Limited reach	National ActBlue audience	Contrast-driven digital fundraising (vs. Park and Hargrove) can generate \$200K-\$400K

## Donors Who Think Nationally

DONOR TYPE	WHY SANTOS ACTIVATES THEM	ESTIMATED YIELD
National women's donor networks	Open-seat Latina candidate in competitive primary	\$150K-\$250K (bundled through EMILY's List)
Latino Victory Fund bundling program	First potential Latina from CD-12; national milestone	\$75K-\$125K
Democracy Alliance members	Progressive open-seat pickup; diverse candidate	\$50K-\$100K (requires personal cultivation)
National clean energy investors	Federal energy policy > state policy; committee access	\$50K-\$100K
ActBlue small-dollar (national)	Story-driven; immigrant family + public defender arc	\$200K-\$400K (with sustained digital investment)

## Committee Access Donors

ASPIRED COMMITTEE	DONOR TYPES ACTIVATED	WHY
<b>Energy &amp; Commerce</b>	Clean energy executives, telehealth founders, generic pharma, environmental engineers	Jurisdiction over energy, healthcare, and technology policy — directly impacts their businesses
<b>Education &amp; Workforce</b>	University administrators, workforce development orgs, community college leadership, childcare providers	Jurisdiction over higher ed funding, workforce programs, and labor standards
<b>Judiciary</b>	Criminal justice reform donors, immigration attorneys, civil rights organizations	Jurisdiction over criminal justice, immigration, and civil liberties — Santos's professional background

# PHASE 6 — UNLOCK OPPORTUNITIES

**Methodology:** “Unlock Opportunities” are non-obvious capital sources that most campaigns miss because they require either (a) unconventional outreach, (b) policy-specific knowledge, or (c) cross-sector thinking.

## 6.1 — Battery Storage Supply Chain Executives

DIMENSION	DETAIL
<b>What it is</b>	Great Plains Battery Co. (CD-12) has a supply chain of 40+ vendors — component manufacturers, logistics firms, and raw materials suppliers — whose executives are not traditional political donors but whose businesses depend on the clean energy build-out Santos champions.
<b>Why it matters</b>	Estimated 120+ executives across the supply chain with capacity to give \$500-\$3,300. Total potential: \$60K-\$150K from a segment no other candidate is working.
<b>How to activate</b>	Ask Great Plains Battery CEO (already a supporter) to host a supply-chain fundraiser. Frame it as “protecting the clean energy jobs pipeline.” Provide a one-page policy brief connecting Santos’s platform to supply-chain growth.
<b>Why campaigns miss it</b>	Campaigns target the anchor company but ignore the supply chain. Vendor executives are high-capacity donors who self-identify as “not political” — they need an economic frame, not an ideological one.

## 6.2 — CDFI Loan Officers and Board Members

DIMENSION	DETAIL
<b>What it is</b>	Community Development Financial Institutions have boards stacked with local bank executives, foundation officers, and real estate professionals who understand how LIHTC and community development policy affects capital flows.

DIMENSION	DETAIL
<b>Why it matters</b>	Keystone CDC alone has 15 board members with average giving capacity of \$1,000-\$3,300. Three CDFIs operate in CD-12. Total potential: \$30K-\$75K. These donors also connect to larger community development finance networks nationally.
<b>How to activate</b>	Santos tours Keystone CDC affordable housing project; Keystone CEO co-hosts intimate reception for board and peer CDFI leaders. Santos presents her federal affordable housing platform with specific LIHTC and CLT funding numbers.
<b>Why campaigns miss it</b>	CDFIs are seen as nonprofit partners, not donor pools. Their boards, however, are composed of high-net-worth professionals with direct economic interest in housing policy.

### 6.3 — Reentry Services Entrepreneurs

DIMENSION	DETAIL
<b>What it is</b>	A growing ecosystem of social enterprises providing employment services, housing, and behavioral health to formerly incarcerated individuals. Santos's diversion and reentry platform directly expands their market.
<b>Why it matters</b>	Small individual checks (\$250-\$1,000) but high authenticity value — these donors validate Santos's criminal justice platform with personal credibility. Their involvement generates earned media and social content. Estimated yield: \$15K-\$30K direct; significant earned media value.
<b>How to activate</b>	Host a "second chances roundtable" with reentry service providers and program graduates. Feature Santos's public defender experience. Convert attendees to monthly small-dollar donors and surrogate validators.

DIMENSION	DETAIL
<b>Why campaigns miss it</b>	Seen as a constituency, not a donor segment. But the founders and executives of reentry-focused social enterprises are mission-driven givers who will max out for a candidate with Santos's background.

## 6.4 — University Technology Transfer Officers

DIMENSION	DETAIL
<b>What it is</b>	Riverside State University's Office of Technology Transfer manages patents and spin-out companies. The professionals who run these offices — and the faculty entrepreneurs they support — benefit directly from Santos's STEM workforce and R&D investment positions.
<b>Why it matters</b>	8-12 high-capacity donors (\$1,000-\$3,300) who bridge academia and private sector. They also connect to venture networks that Santos currently lacks (and that Hargrove dominates). Total potential: \$15K-\$40K direct; relationship bridge to tech-aligned capital.
<b>How to activate</b>	Campus innovation tour with Santos; meet with tech transfer team and faculty entrepreneurs. Frame Santos's workforce and STEM policy as "lab-to-market pipeline" investment.
<b>Why campaigns miss it</b>	University fundraising is typically aimed at faculty broadly. Tech transfer officers are a micro-segment with outsized network value and personal economic alignment.

# PHASE 7 — ACTIONABLE FUNDRAISING PLAN

## Top 10 Immediate Targets

#	TARGET	TYPE	EST. YIELD	ACTION	TIMELINE
1	EMILY's List endorsement application	Institutional	\$150K-\$250K (bundled)	Submit application; prep endorsement interview	Week 1-2
2	State AFL-CIO + building trades PACs	Labor/PAC	\$75K-\$120K	Endorsement meetings; present labor scorecard	Week 1-3
3	Verdant Solar CEO fundraiser	Clean energy	\$40K-\$70K	CEO commits to host; curate invite list from Phase 2 companies	Week 2-4
4	Latino Victory Fund application	Institutional	\$75K-\$125K (bundled)	Apply for endorsement; prep candidate interview	Week 1-2
5	Criminal justice reform roundtable	Policy/donor hybrid	\$15K-\$30K + earned media	Identify 20 defense attorneys and reform advocates; Santos hosts	Week 3-5
6	ActBlue digital launch (contrast series)	Small-dollar	\$30K-\$50K (first 30 days)	Produce 3 contrast videos: Santos vs. Park (DC money), Santos vs. Hargrove (fossil fuel)	Week 1-2
7	Trial lawyers / AAJ state chapter event	Legal	\$25K-\$45K	AAJ contact hosts reception; Santos presents workers' rights platform	Week 3-5

#	TARGET	TYPE	EST. YIELD	ACTION	TIMELINE
8	Keystone CDC board reception	Housing/CDFI	\$20K-\$40K	Site tour + reception; Santos presents federal affordable housing plan	Week 4-6
9	Healthcare professionals fundraiser	Healthcare	\$15K-\$30K	Riverside CHC staff-organized; "public option for CD-12" framing	Week 4-6
10	National progressive bundler outreach	National HNW	\$25K-\$50K (first tranche)	Personal meetings at 2 national convenings; viability deck with polling + endorsements	Week 4-8

## Sequencing Logic

PHASE	TIMEFRAME	OBJECTIVE	KEY ACTIONS
<b>Phase A: Validation</b>	Weeks 1-4	Secure institutional endorsements that unlock bundling infrastructure and signal viability	EMILY's List, Latino Victory Fund, AFL-CIO endorsement applications. Launch digital fundraising. First clean energy fundraiser.
<b>Phase B: Expansion</b>	Weeks 5-10	Convert policy alignment into donor commitments across all priority segments	Sector-specific fundraisers (housing, healthcare, legal, higher ed). Supply chain unlock (Phase 6). Build bundler network. Scale digital with contrast content.
<b>Phase C: Consolidation</b>	Weeks 11-16	Activate late-money donors, access donors, and anti-	National bundler cultivation. Access-driven donors respond to

PHASE	TIMEFRAME	OBJECTIVE	KEY ACTIONS
		opponent consolidation	endorsement + polling momentum. "Seat is not for sale" consolidation push against Hargrove. FEC flash report on Park's out-of-district money.

## Messaging Angles by Segment

SEGMENT	PRIMARY MESSAGE	CONTRAST FRAME	PROOF POINT
<b>Labor / unions</b>	"I've stood with workers every vote, every time"	Park: no labor record; Hargrove: gig economy investor	100% AFL-CIO scorecard; \$18 min wage authorship
<b>Clean energy</b>	"CD-12 is the clean energy jobs capital — I'll fight for the federal investment to keep it that way"	Hargrove: disclosed fossil fuel holdings	100% clean grid by 2040 plan; Energy & Commerce aspiration
<b>Women's / EMILY's List</b>	"A public defender who became a lawmaker — now ready to fight for CD-12 in Congress"	Only woman in the race; Park and Hargrove are male establishment/wealth candidates	6 years of legislation on housing, justice, workers' rights
<b>Latino / LVF</b>	"My parents came here with nothing. I became a public defender to fight for people like them."	First potential Latina from CD-12	Immigration reform platform; bilingual campaign
<b>Criminal justice reform</b>	"I've been in the courtroom. I've seen the system fail. I wrote the laws to fix it."	Neither opponent has CJ experience or platform	Public defender career; cash bail reform authorship
<b>Healthcare</b>	"Healthcare is a right — and CD-12 deserves a representative who will fight for a public option"	Park: silent on public option; Hargrove: no healthcare platform	CHC expansion plan; Rx pricing reform

SEGMENT	PRIMARY MESSAGE	CONTRAST FRAME	PROOF POINT
<b>Small-dollar / digital</b>	"People-powered. Not bought."	Park: 70%+ out-of-district money; Hargrove: \$1.5M self-funded	Average donation size; grassroots donor count
<b>Housing / CDFI</b>	"I wrote the state's affordable housing law. Now I'll take that fight to Congress."	Neither opponent has housing policy record	State LIHTC legislation; CLT funding plan

## PHASE 8 — EXECUTIVE SUMMARY

1. **Santos's policy positions create donor alignment across five high-yield sectors** — labor, clean energy, affordable housing, healthcare access, and higher education — each containing identified companies, organizations, and executives in CD-12.
2. **The EMILY's List and Latino Victory Fund endorsements are the single highest-leverage fundraising actions.** Combined, they can unlock \$225K-\$375K in bundled contributions and signal national viability. Applications should be filed in Week 1.
3. **Clean energy is Santos's most distinctive economic-donor advantage.** Neither Park nor Hargrove has a clean energy jobs plan. Verdant Solar, Great Plains Battery, and Lakeshore Wind represent an in-district industry cluster with 500+ employees and executive-level donor capacity of \$100K-\$200K.
4. **Labor endorsements (AFL-CIO, building trades, SEIU, IBEW) provide both PAC money and volunteer infrastructure.** Santos's 100% labor scorecard makes this the most reliable capital source. Estimated PAC + individual yield: \$75K-\$120K.
5. **Park's primary vulnerability is out-of-district money.** An estimated 70%+ of his \$2.8M comes from DC and national donors. Santos should frame every fundraising communication as "people-powered vs. DC-funded" to activate anti-establishment donors and drive small-dollar acquisition.
6. **Hargrove's disclosed fossil fuel and defense holdings create a powerful contrast** for clean energy donors, environmental voters, and progressive small-dollar givers. The "this seat is not for sale" frame does double duty — it attacks self-funding AND problematic holdings.
7. **Four non-obvious "unlock" opportunities (Phase 6) represent \$120K-\$295K in capital** that neither opponent is pursuing: battery supply chain executives, CDFI

board members, reentry service entrepreneurs, and university tech transfer officers.

8. **Digital small-dollar fundraising (ActBlue) should target \$200K-\$400K** over the primary cycle. Santos's personal story and sharp opponent contrasts are optimized for digital acquisition. Investment in contrast video content in Weeks 1-2 is critical.
9. **Access-driven donors (lobbyists, trade associations, law firms) will activate in Phase C** once Santos demonstrates fundraising parity and endorsement momentum. These donors are currently hedging across all three candidates. Energy & Commerce and Education & Workforce committee aspirations are the key signals.
10. **The fundraising plan is sequenced in three phases:** Validation (Weeks 1-4, endorsement-driven), Expansion (Weeks 5-10, sector-specific fundraisers and digital scaling), and Consolidation (Weeks 11-16, late money and national bundlers).
11. **Total estimated primary fundraising potential across all identified segments: \$1.2M-\$2.1M.** This would close the gap with Park (\$2.8M) and exceed Hargrove's non-self-funded total. Execution depends on endorsement timing, digital investment, and disciplined fundraiser sequencing.
12. **Santos's strongest strategic asset is authenticity.** Immigrant family, public defender, state legislator with a real record — in a field where one opponent is a DC transplant and the other is a self-funding tech entrepreneur. Every fundraising touchpoint should reinforce that contrast.

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## APPENDIX A — STRICT-RULE COMPLIANCE

### DFX Intelligence — Lawful Public-Records Research

This Capital Pathway Strategy was compiled exclusively from publicly available primary and credible secondary sources. All donor segment estimates are based on historical giving patterns in comparable races and publicly available FEC data. No private donor lists, paywalled databases, or unlawfully obtained data were used.

**Compliance notes:** - All contribution limits cited reflect 2025-2026 FEC regulations (\$3,300/individual/primary) - PAC contribution estimates reflect federal PAC-to-candidate limits (\$5,000/election) - No coordination with independent expenditure committees is contemplated or recommended - Donor outreach recommendations

comply with federal solicitation regulations - All opponent financial data referenced is drawn from public FEC filings and candidate disclosures

## APPENDIX B — VERIFICATION NOTES

ITEM	SOURCE	VERIFICATION STATUS	NOTE
Great Plains Battery Co. \$40M facility expansion	<i>Riverside Business Journal</i> , Feb 2026; county economic development press release	VERIFIED	Confirmed through two independent public sources; 300-job figure from county press release
David Park out-of-district donor concentration (est. 70%+)	FEC Schedule A analysis (Q1 2026 filing, C00XXXXXX)	VERIFIED	Full itemized-donor geographic analysis completed; 72.4% of itemized contributions from outside CD-12 boundaries
Thomas Hargrove fossil fuel and defense holdings	Hargrove 2025 Personal Financial Disclosure (candidate filing)	VERIFIED	Disclosed holdings in Meridian Petroleum Corp (\$250K-\$500K) and Aegis Defense Systems (\$100K-\$250K); filed with FEC March 2026

**SAMPLE DOCUMENT — All candidates, donors, organizations, companies, and data points in this report are entirely fictional and created for demonstration purposes only. No real individuals, campaigns, or organizations are represented.**

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