Complete Campaign Intelligence Playbook — SAMPLE

SAMPLE — Maria Santos for Congress, CD-12 Democratic Primary

DFX Intelligence

April 2026

Complete Campaign Intelligence Playbook

Opposition Research + Capital Strategy + Fundraising Execution

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Prepared for Maria Santos U.S. House — 12th Congressional District

DFX Intelligence April 2026

SAMPLE — Confidential

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

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RACE OVERVIEW

FIELD	DETAIL
Candidate	Maria Santos, State Representative (D-Riverside), District 14 — elected 2020, re-elected 2022, 2024
Office sought	U.S. House, 12th Congressional District (open seat — Rep. Catherine Hollis retiring)
Primary	August 4, 2026
General	November 3, 2026
Geography	Suburban/urban district. Includes Riverside, Lakewood, Greenfield, university town of Ashford, and rural eastern communities. Economically diverse — healthcare, clean energy, light manufacturing, and a major public university.
Stage	Mid-primary. Park leads in fundraising ($2.8M). Hargrove self-funded at ~$1.5M. Santos building institutional and identity-network pipeline.

CANDIDATE	PROFILE	FUNDING	KEY STRENGTH	KEY VULNERABILITY
Maria Santos	Former public defender → 6-year State Rep. Daughter of immigrants. Criminal justice reform, housing, workers' rights.	TBD — building institutional pipeline	Biography, district roots, labor record, identity	Capital deficit vs. both opponents
David Park	Former Deputy Assistant Secretary, Commerce Dept. DC establishment candidate.	$2.8M raised; national/DC donor base	Fundraising lead, endorsement coalition, DC network	82% of money from outside district; "carpetbagger" frame
Thomas Hargrove	Tech entrepreneur, former VC partner. Self-funded.	~$1.5M (~$1.1M self-funded)	Subject-matter expertise, unlimited self-funding capacity	Defense/fossil fuel holdings; "buying the seat"; zero endorsements

VOLUME I — OPPOSITION RESEARCH: DAVID PARK

Executive Summary

> **All data in this section is fictional and created for demonstration purposes.**

1. **Identity verified.** David Yoon Park, age 44, resident of Ashford, CD-12. Moved to the district in March 2025 after spending career in Washington, DC and New York. (VERIFIED FACT — voter registration records; Ashford Gazette 4/12/2025.)
2. **Career: Goldman Sachs → Commerce Department → K Street consulting.** Analyst at Goldman Sachs (2004–2008); policy advisor at Senate Commerce Committee (2008–2012); Deputy Assistant Secretary for Economic Development, U.S. Commerce

Department (2013–2017); Managing Director, Clearwater Policy Group LLC (DC consulting, 2017–2025); candidate for CD-12 since October 2025. (VERIFIED FACT — LinkedIn; Commerce Dept archived bio; Clearwater website.)

3. **Fundraising leader.** FEC Committee to Elect David Park (C00XXXXXX) reports cycle receipts of **$2,812,445** with cash on hand of **$2,340,118** as of Q1 2026. Median donation ~$35 (campaign-reported). (VERIFIED FACT — FEC.gov.)
4. **82% of itemized individual contributions originated outside CD-12.** 47% from the greater DC metro area; 22% from New York metro. (VERIFIED FACT — FEC Schedule A analysis.)
5. **Clearwater Policy Group conflict.** Park's consulting firm billed $1.8M in 2024 revenue from clients including three defense contractors and two pharmaceutical trade associations. Firm was not dissolved upon campaign launch — placed in a "management trust" with Park's former deputy. (VERIFIED FACT — DC business filings; Riverside Register 2/14/2026.)
6. **95+ claimed endorsements** including former Commerce Secretary Janet Liu, former Rep. Catherine Hollis (retiring incumbent), state party chair, and 40+ elected officials. Heavy DC/national orientation. (VERIFIED FACT — campaign website; Ashford Gazette.)
7. **Residency vulnerability.** Park purchased his Ashford home in March 2025, seven months before announcing. Prior to that, he had no residential history in CD-12. District press has covered this: "Park is a DC consultant who moved here to run" (Riverside Register editorial, 1/18/2026). (VERIFIED FACT.)
8. **No civil or criminal litigation found.** Clean PACER, state court, SEC, and FEC enforcement record. (VERIFIED FACT — negative search.)

Candidate Profile

FIELD	DETAIL
Full name	David Yoon Park
Date of birth	June 12, 1982 (age 44)
Residence	1847 Oakwood Lane, Ashford, CD-12 (since March 2025)
Prior residence	Georgetown, Washington, DC (2008–2025)
Spouse	Rebecca Chen-Park (partner at Morrison & Foerster LLP, DC office)

FIELD	DETAIL
Education	B.A. Economics, Yale University (2004); M.P.A., Princeton Woodrow Wilson School (2008)
FEC Committee	Committee to Elect David Park — C00XXXXXX

Career Timeline

PERIOD	ROLE	NOTES
2004–2008	Analyst, Goldman Sachs (NYC)	Investment banking division
2008–2012	Policy advisor, U.S. Senate Commerce Committee	Staff to Sen. Maria Whitman (D)
2013–2017	Deputy Assistant Secretary for Economic Development, U.S. Commerce Department	Obama/early Trump transition
2017–2025	Managing Director, Clearwater Policy Group LLC (DC)	Consulting firm; defense, pharma, tech clients
Oct 2025	Declared candidate, U.S. House CD-12	Filed October 8, 2025

Donor Overview

METRIC	AMOUNT
Total receipts (cycle)	$2,812,445
Individual contributions	$2,658,920
PAC contributions	$87,500
Candidate self-contributions	$66,025
Cash on hand (Q1 close)	$2,340,118
Debts	$72,000

Donor Geography

SOURCE	% OF ITEMIZED	NOTES
DC metro area	47%	Clearwater Policy Group network; Commerce Dept alumni; Senate staff alumni
New York metro	22%	Goldman Sachs alumni; Yale network
In-district (CD-12)	18%	Ashford, Riverside, Lakewood
Other national	13%	Scattered; Princeton/Woodrow Wilson alumni

> **The "82% out of district" frame is the single most exploitable fundraising vulnerability.** It directly parallels the Santos campaign's core message: "This race is between someone who moved here to run and someone who has been fighting for this community for six years."

Donor Risk Watchlist

CLUSTER	CONCERN	PRIORITY
Defense contractor executives (Clearwater clients)	Conflict of interest — consulting income from industries with federal legislative exposure	HIGH
Goldman Sachs alumni donors	"Wall Street" framing in a Democratic primary	MEDIUM
Pharma trade association network	Clearwater billed two pharma trade groups; donors from those groups are on Schedule A	HIGH

Legal / Regulatory History

SEARCH	DATABASE	RESULT
Federal civil/criminal	PACER	No results
State civil/criminal	State trial court	No results
FEC enforcement (MUR)	FEC	No results
SEC enforcement	SEC EDGAR	No results
Federal lobbying (LDA)	lda.senate.gov	**Clearwater Policy Group registered; 6 lobbyists; $1.8M in 2024 revenue**

> **Assessment:** Park's personal legal record is clean. The exposure is in the Clearwater Policy Group client portfolio and the fact that it was not dissolved upon campaign launch.

Business / Ethics / Conflict Review

Clearwater Policy Group LLC

- Founded 2017; DC-registered LLC
- 2024 revenue: ~$1.8M (LDA filings)
- Confirmed clients via LD-2 filings: **Meridian Defense Systems** ($120K), **Northgate Aerospace** ($90K), **PharmaBridge Trade Association** ($160K), **American Biotech Council** ($140K), **Pacific Rim Trade Alliance** ($80K)
- Park placed the firm in a "management trust" with former deputy managing director Alan Whitaker upon campaign launch. Park retains ownership interest. (VERIFIED FACT — Riverside Register 2/14/2026.)
- **Conflict risk: HIGH.** Defense and pharmaceutical clients have direct federal legislative exposure. The "management trust" structure does not eliminate the conflict — it manages optics.

Financial Disclosure

ASSET	VALUE RANGE	MATERIALITY
Clearwater Policy Group ownership interest	$1M–$5M (est.)	5

ASSET	VALUE RANGE	MATERIALITY
Goldman Sachs deferred compensation / vested equity	$500K–$1M	3
Yale University endowment gift annuity	$100K–$250K	1
Residential real estate (Georgetown townhouse, retained)	$1.5M–$2.5M	3 — still owns DC home

> **Note:** Park still owns his Georgetown townhouse. This will be used against him in residency attacks.

Media / Controversy Tracker

#	ITEM	EVIDENCE	MATERIALITY
M-1	“82% of money from outside district”	FEC Schedule A analysis	5
M-2	“DC consultant who moved here to run” (Riverside Register editorial)	Local press	4
M-3	Clearwater Policy Group defense/pharma client portfolio	LDA filings; Riverside Register	4
M-4	Still owns Georgetown townhouse	Property records	3
M-5	Goldman Sachs career — “Wall Street to Washington” frame	Career record	3

#	ITEM	EVIDENCE	MATERIALITY
M-6	Commerce Dept transition tenure — served briefly under Trump administration	Personnel records	3

Red / Yellow / Green Flags

CATEGORY	ITEMS
Red	82% out-of-district money; Clearwater Policy Group defense/pharma client conflicts (not dissolved)
Yellow	Georgetown townhouse retained; Goldman Sachs background; Commerce Dept Trump-transition overlap; “carpetbagger” frame
Green	No litigation; no enforcement actions; strong fundraising; deep endorsement coalition

Open Questions

1. Full Clearwater Policy Group client list (2017–2025) via LDA year-by-year pull
2. Park’s House Clerk PFD — not yet filed; should disclose Clearwater ownership value and client income
3. Whether “management trust” structure triggers any ethics obligations
4. Goldman Sachs deferred compensation details
5. Georgetown property — rented or vacant?

VOLUME II — OPPOSITION RESEARCH: THOMAS HARGROVE

Executive Summary

All data in this section is fictional and created for demonstration purposes.

1. **Identity verified.** Thomas James Hargrove III, age 51, resident of Lakewood, CD-12. Lifelong district resident — raised in Greenfield, moved to Lakewood in 2009. (VERIFIED FACT — voter registration; Lakewood Herald 11/2/2025.)
2. **Career: software engineer → startup founder → VC partner → candidate.** Software engineer at Datascape Inc. (1997–2003); co-founder and CTO, Sentinel Analytics (2003–2012, acquired by Axiom Corp for $180M); General Partner, Ridgeline Ventures (2012–2025); candidate for CD-12 since November 2025. (VERIFIED FACT — Crunchbase; SEC filings; campaign website.)
3. **Self-funded.** FEC committee HARGROVE FOR CONGRESS (C00YYYYYY) reports $1,542,800 total raised, of which **$1,103,600 (~72%) is candidate self-funding**. Third-party fundraising of ~$439,200. Cash on hand: $1,287,450. (VERIFIED FACT — FEC.gov.)
4. **Financial disclosures reveal significant conflicts.** House Clerk PFD reports up to **$78M in total assets**, including:
   - **Meridian Defense Systems:** $2M–$5M (defense contractor)
   - **Apex Petroleum Corp:** $500K–$1M (fossil fuels)
   - **Paladin AI Technologies:** $1M–$5M (AI/surveillance)
   - **Ridgeline Ventures Fund III:** $5M–$25M (VC fund)
   - Sentinel Analytics (Axiom) earnout payments: $1M–$5M (VERIFIED FACT — Lakewood Herald 3/8/2026; Ashford Gazette 3/10/2026.)
5. **Zero public endorsements** as of report date. Did not return the Progressive Democrats questionnaire; Santos, Park, and two other primary opponents did. (VERIFIED FACT — Ashford Gazette endorsement tracker.)
6. **"Outsider" framing in tension with VC career.** Hargrove positions himself as a "business outsider who gets things done." Ashford Gazette editorial explicitly notes the tension: "An outsider who spent 13 years at a Sand Hill Road venture capital firm is a particular kind of outsider." (VERIFIED FACT — Ashford Gazette 2/22/2026.)
7. **Ridgeline Ventures portfolio includes companies with federal regulatory exposure.** Portfolio companies include NovaCyber (government cybersecurity contracting), GreenGrid Storage (seeking DOE loan guarantees), and MedAssist AI (healthcare AI facing FDA regulation). (VERIFIED FACT — Ridgeline Ventures website; SEC Form D filings.)
8. **No civil or criminal litigation involving Hargrove personally found.** Sentinel Analytics was defendant in two patent infringement suits (both settled pre-acquisition). Hargrove was not named individually. (VERIFIED FACT — PACER.)

Candidate Profile

FIELD	DETAIL
Full name	Thomas James Hargrove III
Date of birth	September 3, 1975 (age 51)
Residence	2240 Lakeshore Drive, Lakewood, CD-12 (since 2009)
Spouse	Dr. Patricia Hargrove (dermatologist; private practice in Riverside)
Education	B.S. Computer Science, Stanford University (1997); M.B.A., Wharton School (2012)
FEC Committee	HARGROVE FOR CONGRESS — C00YYYYYY

Career Timeline

PERIOD	ROLE	NOTES
1997–2003	Software engineer, Datascape Inc. (Riverside)	Early career; local employer
2003–2012	Co-Founder & CTO, Sentinel Analytics	Acquired by Axiom Corp for $180M (2012)
2012–2025	General Partner, Ridgeline Ventures (Menlo Park / Lakewood)	$400M AUM across three funds
Nov 2025	Declared candidate, U.S. House CD-12	Filed November 1, 2025

Donor Overview

METRIC	AMOUNT
Total receipts (cycle)	$1,542,800
Individual contributions	$398,200

METRIC	AMOUNT
Unitemized contributions	$41,000
Candidate self-funding	**$1,103,600 (~72%)**
Cash on hand (Q1 close)	$1,287,450
Debts	$1,103,600 (self-loans)

Donor Cluster Patterns

CLUSTER	EVIDENCE	PRIORITY
Self-funding overwhelms third-party fundraising	FEC	5
VC / tech executive donors (Ridgeline portfolio company founders)	INFERENCE — pending Schedule A	4
Stanford / Wharton alumni network	INFERENCE — pending Schedule A	3
Lakewood / Greenfield personal network	INFERENCE — pending Schedule A	2

Financial Disclosure Highlights (House Clerk PFD)

ASSET	VALUE RANGE	MATERIALITY
Meridian Defense Systems common stock	**$2,000,001–$5,000,000**	5
Apex Petroleum Corp common stock	**$500,001–$1,000,000**	4
Paladin AI Technologies common stock	**$1,000,001–$5,000,000**	4
Ridgeline Ventures Fund III partnership interest	**$5,000,001–$25,000,000**	5

ASSET	VALUE RANGE	MATERIALITY
Sentinel Analytics / Axiom Corp earnout	$1,000,001–$5,000,000	3
U.S. Treasury securities	$5,000,001–$25,000,000	1
Residential real estate (Lakewood)	$2,500,000–$5,000,000	1
2025 compensation (GP, Ridgeline Ventures)	~$1,400,000	4
Reported total assets	**Up to ~$78M**	5

Legal / Regulatory History

SEARCH	DATABASE	RESULT
Federal civil/criminal (Hargrove personally)	PACER	No results
State civil/criminal	State trial court	No results
FEC enforcement	FEC	No results
SEC enforcement	SEC EDGAR	No results against Hargrove personally
Patent litigation (Sentinel Analytics)	PACER	2 suits — both settled pre-acquisition; Hargrove not named individually

Business / Ethics / Conflict Review

Standing Structural Conflicts

1. **Meridian Defense Systems stock ($2M–$5M)** while seeking a seat that votes on defense authorization and appropriations. If elected, requires divestment, blind trust, or formal recusal. **Materiality 5.**
2. **Apex Petroleum common stock ($500K–$1M)** in a Democratic primary where climate is a top-3 issue. Political optics are severe. **Materiality 4.**

3. **Paladin AI Technologies ($1M–$5M)** — AI/surveillance company facing federal AI regulation. Hargrove would vote on AI oversight legislation while holding stock. **Materiality 4.**
4. **Ridgeline Ventures Fund III ($5M–$25M)** — portfolio includes companies seeking DOE loan guarantees (GreenGrid Storage) and FDA clearance (MedAssist AI). **Materiality 5.**

"Outsider" Framing vs. Reality

- Hargrove campaigns as a "business outsider" and "problem-solver, not a politician"
- Ashford Gazette editorial 2/22/2026: "An outsider who spent 13 years at a Sand Hill Road venture capital firm is a particular kind of outsider"
- ~72% self-funding ratio + $78M in disclosed assets + zero endorsements + did not return Progressive Democrats questionnaire = tension between "outsider" brand and "wealthy insider buying a seat" reality

Media / Controversy Tracker

#	ITEM	EVIDENCE	MATERIALITY
M-1	Meridian Defense Systems + Apex Petroleum + Paladin AI holdings	House Clerk PFD; Lakewood Herald; Ashford Gazette	5
M-2	~$1.1M self-funded; "one of the biggest self-funders in recent district history"	FEC; Ashford Gazette	5
M-3	Ridgeline Ventures portfolio company regulatory conflicts	SEC Form D; portfolio website	4
M-4	"Outsider" framing vs. VC career (Ashford Gazette editorial)	Local press	4
M-5	Zero endorsements; did not return Progressive Democrats questionnaire	Ashford Gazette tracker	3
M-6	$1.4M annual compensation as	PFD	3

#	ITEM	EVIDENCE	MATERIALITY
	Ridgeline Ventures GP		

Red / Yellow / Green Flags

CATEGORY	ITEMS
Red	Meridian Defense Systems stock ($2M–$5M) + Apex Petroleum stock ($500K–$1M) held while running for federal office; Ridgeline Ventures portfolio companies seeking federal contracts/clearances
Yellow	~$1.1M self-funding; $78M total assets; Paladin AI surveillance-tech holdings; zero endorsements; non-return of Progressive Democrats questionnaire; “outsider” framing tension
Green	No personal litigation; no enforcement actions; lifelong district resident (unlike Park); legitimate subject-matter expertise in technology and business

Open Questions

1. Full Ridgeline Ventures Fund I, II, III portfolio company list — which ones have federal contracting or regulatory exposure?
2. Hargrove’s House Clerk PFD — retrieve full PDF for line-by-line review
3. Sentinel Analytics acquisition terms — any ongoing Axiom board seat or advisory role?
4. Whether Hargrove commits to divesting Meridian Defense, Apex Petroleum, and Paladin AI
5. Full FEC Schedule A pull for donor-level analysis (Q1 2026 due April 15)
6. Whether any Ridgeline Ventures portfolio company founders are donors to the campaign

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VOLUME III — CAPITAL PATHWAY STRATEGY

Capital Pathway Strategy — Maria Santos for Congress

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

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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
Criminal justice reform	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
Affordable housing	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
Workers' rights / labor	$18 federal minimum wage, card-check neutrality, gig worker classification, paid family leave mandate	Unions (building trades, service, healthcare), childcare providers, domestic manufacturers	Gig economy platforms, franchise operators, low-wage service chains	HIGH
Clean energy / climate	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

POLICY AREA	SANTOS POSITION	INDUSTRIES THAT BENEFIT	INDUSTRIES AT RISK	CONFIDENCE
Healthcare access	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
Higher education / workforce	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
Immigration reform	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)	**Beneficiary**	140 employees; CEO active in local Dem politics
Lakeshore Wind Holdings	Wind energy developer	National; project office in CD-12	**Beneficiary**	Building 200MW wind farm in adjacent county
Great Plains Battery Co.	Battery storage mfg	Millbrook (CD-12)	**Beneficiary**	Recent $40M facility expansion; 300 jobs
MidAmerica Natural Gas Corp.	Gas utility	Regional; serves CD-12	**At-Risk**	Santos's 100% clean grid target threatens core business model
Apex Environmental Engineering	Environmental consulting	Riverside (CD-12)	**Beneficiary**	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)	**Beneficiary**	Largest FQHC in district; public option + CHC expansion = direct funding increase
ClearPath Telehealth Inc.	Telehealth platform	National; engineering team in Riverside	**Beneficiary**	Expanded coverage = expanded patient pool
GeneriCure Pharmaceuticals	Generic drug mfg	Millbrook (CD-12)	**Beneficiary**	Drug pricing reform advantages generics over brand-name
Pinnacle Health Insurance Group	Private insurer	Regional; major employer in CD-12	**At-Risk**	Public option creates competitive pressure
Crestview Medical Systems	Hospital network	CD-12 (3 facilities)	**Neutral**	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)	**Beneficiary**	LIHTC expansion = core business growth
Lumen Homes LLC	Affordable housing developer	CD-12	**Beneficiary**	Inclusionary zoning creates protected market share

COMPANY / ORG	TYPE	HQ / PRESENCE	BENEFICIARY / AT-RISK / NEUTRAL	NOTES
Heritage Luxury Partners	Market-rate luxury developer	Regional; active in CD-12	**At-Risk**	Inclusionary mandates compress margins
Ironworkers Local 47	Building trades union	Riverside (CD-12)	**Beneficiary**	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)	**Beneficiary**	Pell Grant expansion increases enrollment and revenue
Millbrook Community College	Community college	Millbrook (CD-12)	**Beneficiary**	Tuition-free CC = enrollment surge
Trident Technical Institute	For-profit college	CD-12	**At-Risk**	Free CC enrollment directly competes with for-profit model
Bridgepoint Workforce Solutions	Workforce dev nonprofit	CD-12	**Beneficiary**	STEM apprenticeship funding = 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	**Beneficiary**	Card-check + minimum wage = organizing leverage
IBEW Local 234	Electrical workers' union	Riverside (CD-12)	**Beneficiary**	Clean energy build-out = massive job growth for electricians
Central Valley Staffing Inc.	Gig/temp staffing	CD-12	**At-Risk**	Gig worker classification threatens business model
United Food & Commercial Workers Local 770	Retail/food workers' union	Regional	**Beneficiary**	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
Who	Executives, founders, and investors in clean energy, affordable housing, healthcare access, and workforce development
Why they give	Santos's platform directly increases their revenue, market share, or regulatory position.

DIMENSION	DETAIL
	This is rational economic behavior, not ideology.
Expected behavior	Will give at or near max when they believe Santos can win *and* will have committee influence. Sensitive to viability signals (endorsements, polling, fundraising momentum).
Risk	Transactional donors may hedge by also giving to Park or Hargrove. Require explicit committee-aspiration signaling.

3.2 — The Ideological Alignment Donor

DIMENSION	DETAIL
Who	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.
Why they give	Deep values alignment. Santos's personal story (immigrant family, public defender) creates emotional resonance beyond policy positions.
Expected behavior	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).
Risk	May have competing demands from other progressive candidates nationally. Requires regular narrative engagement.

3.3 — The Access / Influence Donor

DIMENSION	DETAIL
Who	Lobbyists, government affairs professionals, trade association executives, and law firm partners with clients in Santos's policy areas

DIMENSION	DETAIL
Why they give	Invest in relationships with future members of Congress. Santos's expected committee assignments (Energy & Commerce, Education & Workforce) determine their interest.
Expected behavior	Late money — wait for clear front-runner signals. Give at max contribution. Expect face time and responsiveness. Often bundlers.
Risk	Currently hedging across all three candidates. Will not move until Santos demonstrates fundraising parity with Park.

3.4 — The Anti-Opponent Donor

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

3.5 — The Identity / Representation Donor

DIMENSION	DETAIL
Who	Donors who prioritize electing women, Latina candidates, daughters of immigrants, and former public defenders. Includes institutional donors (EMILY's List, Latino Victory Fund, Hispanic Caucus BOLD PAC).

DIMENSION	DETAIL
Why they give	Representation matters. Santos's candidacy is a milestone opportunity for Latina representation in Congress.
Expected behavior	Early validators. Institutional endorsements unlock bundling networks. Individual donors in this category are highly shareable on social media — amplify with digital storytelling.
Risk	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	**Labor PACs & union leadership (building trades, healthcare, service)**	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	**Clean energy executives (solar, wind, battery, EV)**	100% clean grid by 2040 = decade of growth; Santos is the only candidate with a specific clean energy jobs plan	$1,000-$3,300	Host Verdant Solar CEO-led fundraiser; emphasize Energy & Commerce committee aspiration

RANK	SEGMENT	WHY HIGH PROBABILITY	EST. CHECK SIZE	OUTREACH ANGLE
3	**EMILY's List / women's donor network**	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	**Latino Victory Fund + Hispanic donor network**	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	**Criminal justice reform donors (foundations, advocates, attorneys)**	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	**Affordable housing / CDFI professionals**	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

RANK	SEGMENT	WHY HIGH PROBABILITY	EST. CHECK SIZE	OUTREACH ANGLE
7	**Healthcare professionals (community health, nursing, telehealth)**	Public option + CHC expansion = jobs and funding; contrast with Park's pharma-neutral stance and Hargrove's healthcare silence	$250-$1,500	Riverside Community Health Center visit + staff-led fundraiser; "healthcare is a right" messaging
8	**Higher ed faculty & administrators (Riverside State, Millbrook CC)**	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	**Trial lawyers / plaintiffs' bar**	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	**Progressive small-dollar (ActBlue)**	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

RANK	SEGMENT	WHY HIGH PROBABILITY	EST. CHECK SIZE	OUTREACH ANGLE
11	**Environmental justice community orgs**	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	**Immigration attorneys & advocacy orgs**	Pathway to citizenship + DACA protections; Santos's personal immigrant family story	$250-$1,500	Immigration bar association event; bilingual storytelling
13	**Local small business owners (district)**	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	**Anti-self-funder donors (oppose Hargrove)**	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	**National progressive bundlers (Democracy Alliance, Way to Win)**	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
Contribution limits	$2,000/cycle (state)	$3,300/cycle (federal primary)	Higher ceiling unlocks larger checks from existing supporters
Geographic scope	District 14 only	National	Santos can now tap national progressive, Latino, and women's donor networks
PAC engagement	State-level PACs only	Federal PACs, leadership PACs, national unions	Labor PACs (AFSCME, SEIU, IBEW) can now give directly; endorsement-driven
Committee value	State committee assignments (Housing, Judiciary)	Federal committee aspirations (Energy & Commerce, Education & Workforce)	Access-driven donors activate based on federal committee prospects
Bundling infrastructure	Minimal	Essential	Must build bundler network from scratch; EMILY's List and LVF provide ready infrastructure

DIMENSION	STATE REP. FUNDRAISING	CONGRESSIONAL FUNDRAISING	SANTOS IMPLICATION
Small-dollar digital	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
Energy & Commerce	Clean energy executives, telehealth founders, generic pharma, environmental engineers	Jurisdiction over energy, healthcare, and technology policy — directly impacts their businesses
Education & Workforce	University administrators, workforce development orgs, community college leadership, childcare providers	Jurisdiction over higher ed funding, workforce programs, and labor standards
Judiciary	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
What it is	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.
Why it matters	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.
How to activate	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.
Why campaigns miss it	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
What it is	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.
Why it matters	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.
How to activate	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.
Why campaigns miss it	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
What it is	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.
Why it matters	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.
How to activate	Host a "second chances roundtable" with reentry service providers and program graduates. Feature Santos's public defender

DIMENSION	DETAIL
	experience. Convert attendees to monthly small-dollar donors and surrogate validators.
Why campaigns miss it	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
What it is	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.
Why it matters	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.
How to activate	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.
Why campaigns miss it	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
Phase A: Validation	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.
Phase B: Expansion	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.
Phase C: Consolidation	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
Labor / unions	“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
Clean energy	“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
Women’s / EMILY’s List	“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
Latino / LVF	“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
Criminal justice reform	“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
Healthcare	“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
Small-dollar / digital	“People-powered. Not bought.”	Park: 70%+ out-of-district money; Hargrove: $1.5M self-funded	Average donation size; grassroots donor count
Housing / CDFI	“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

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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.

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	*Riverside Business Journal*, 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.

DFX Intelligence | info@dfxintelligence.com | dfxintelligence.com

VOLUME IV — FUNDRAISING OPERATIONS MANUAL

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

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

SECTION 1 — ENDORSEMENT PIPELINE TRACKER

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

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

#	ORGANIZATION	WHAT THEY DO	WHY SANTOS FITS	ACTION ITEM	DEADLINE
1	**National Progressive Women's Fund**	Endorses and bundles for progressive Democratic women in competitive federal primaries. Major	Open-seat primary. Latina. Public defender biography. Criminal justice reform champion. First in family	Submit endorsement questionnaire immediately. Schedule candidate interview by April 21. Bring: State	Interview by April 21; decision target May 1

#	ORGANIZATION	WHAT THEY DO	WHY SANTOS FITS	ACTION ITEM	DEADLINE
		bundling network — average endorsed candidate receives $150K–$250K in bundled contributions.	to attend college. NPWF has endorsed zero candidates in CA-12 — first mover gets the full bundling infrastructure.	Assembly voting record on SB 1047 (criminal justice), AB 2190 (housing), fundraising trajectory, path-to-win memo.	
2	**Latino Victory Project**	Endorses, bundles, and runs IE for Latino/a candidates in competitive federal races. Building Latino caucus pipeline in Congress.	Latina. Daughter of immigrants. Criminal justice reform record. Only Latina in the CA-12 field. Open seat in a majority-minority district.	Direct outreach to Political Director. Frame: “first Latina to represent CA-12” + public defender biography + competitive primary + viability path. Request video meeting within 10 days.	PD meeting by April 21; endorsement target May 1
3	**Working Families United PAC**	National labor-aligned PAC. Endorses candidates with strong workers’ rights records in competitive primaries. Bundling network of 200+ labor-connected donors.	Santos has a 100% lifetime labor voting score in the State Assembly. Sponsored the Warehouse Workers Protection Act and Fair Scheduling Act. Opponent Park has zero labor record; opponent Hargrove holds $2M–$5M in	Call WFUPAC national political director this week. Santos likely has existing relationship through State Assembly labor coalition. Request endorsement meeting.	Endorsement target April 30

#	ORGANIZATION	WHAT THEY DO	WHY SANTOS FITS	ACTION ITEM	DEADLINE
			Meridian Defense Systems stock.		
4	**Alliance for Justice Action**	National criminal justice reform PAC. Endorses candidates with demonstrated CJ reform records. Operates a bundler network among reform-minded attorneys and advocates.	Santos was a public defender for 8 years. Authored the Second Chance Employment Act in the State Assembly. Only candidate in the field with a criminal justice practice background.	Submit endorsement application with voting record memo. Prepare one-page summary: every CJ reform bill sponsored, co-sponsored, and voted on.	Application by April 18; decision target May 7
5	**SEIU Local 721**	Public-sector workers union — largest local in Southern California. 95,000 members including thousands in the CA-12 footprint.	Santos's 100% labor score. Sponsored public-employee collective bargaining protections. Hargrove's Meridian Defense Systems holdings and Park's Commerce Dept background are anti-labor contrasts.	Direct outreach to Local 721 political director. Request candidate interview with executive board.	Endorsement target May 7

#	ORGANIZATION	WHAT THEY DO	WHY SANTOS FITS	ACTION ITEM	DEADLINE
6	**Planned Parenthood Action Fund (CA chapter + national)**	Endorses and runs IE in federal races on reproductive health.	Pro-choice record. Represented domestic violence survivors as a public defender. “Firewall” narrative in current political environment.	Start with CA chapter. Submit questionnaire. Request endorsement meeting.	CA chapter target May 1; national target May 15
7	**National Housing Justice Alliance**	Endorses candidates with strong affordable housing records. Operates donor network among housing advocates, community development financial institutions, and fair-housing attorneys.	Santos authored the Community Land Trust Expansion Act and the Tenant Protection Act in the State Assembly. Housing affordability is the #1 issue in CA-12.	Submit endorsement application with housing legislative record.	Application by April 18; decision target May 7
8	**Reproductive Freedom Coalition**	National reproductive-rights endorsing and IE organization. Separate endorsement track from Planned Parenthood.	Pro-choice record. Public defender who represented vulnerable women. Only candidate in the field with this biography.	Submit questionnaire. Prepare one-page voting-record memo on every relevant State Assembly vote.	Questionnaire by April 18; decision target May 15

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

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

Tier 3 — Pursue Through June (Network + Volume)

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

SECTION 2 — DONOR CITY TOUR: EVENT PLAN

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

City 1: Riverside / Home District (Recurring)

EVENT TYPE	AUDIENCE	VENUE APPROACH	TARGET YIELD	TIMING
HNW closed-door dinner	Local attorneys; progressive HNW donors; community development leaders; housing advocates	Private home in Riverside or Rancho Mirage. Host committee of 3–5 named hosts who each commit to raising $10K.	$40K–$60K	Sprint 2 (April 28–May 11) — first of series; repeat monthly

EVENT TYPE	AUDIENCE	VENUE APPROACH	TARGET YIELD	TIMING
Latino community celebration	Latino community leaders; small-business owners; neighborhood association leaders; faith community	Restaurant or community center in downtown Riverside. Bilingual event.	$15K–$25K + narrative value	Sprint 2
Criminal justice reform reception	Public defenders; legal-aid attorneys; reform advocates; formerly incarcerated community leaders	Law firm event space (donated) or public defender's office conference facility	$20K–$35K	Sprint 3

Home district host committee targets: - Santos's existing top State Assembly donors who can max out and invite peers - Riverside County Bar Association leadership (peer network) - Community Land Trust board members (housing advocacy network) - Latino Chamber of Commerce president (business community bridge) - Identify 2–3 progressive attorneys who are NPWF or Latino Victory Project bundlers in the Inland Empire

City 2: New York City

EVENT TYPE	AUDIENCE	VENUE APPROACH	TARGET YIELD	TIMING
HNW closed-door dinner	National women-of-color attorney network; criminal justice reform funder boards; reproductive-rights donor network	Private home or law firm in Manhattan	$50K–$75K	Sprint 3 (May 12–25)
Criminal justice reform donor event	Vera Institute–adjacent donors; public defender alumni	Nonprofit event space or law firm	$25K–$40K	Sprint 3

EVENT TYPE	AUDIENCE	VENUE APPROACH	TARGET YIELD	TIMING
	networks; reform philanthropy community			
Latino professional reception	Hispanic National Bar Association members; Latino professionals in finance, law, media	Midtown event space	$15K–$25K	Sprint 3

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

City 3: Washington, DC

EVENT TYPE	AUDIENCE	VENUE APPROACH	TARGET YIELD	TIMING
HNW closed-door dinner	Reproductive-rights national funders; Latino political infrastructure leadership; criminal justice reform donor network; progressive-institutional donor network	Private home in Georgetown or Capitol Hill club space	$75K–$100K	Sprint 4 (May 26–Jun 8)
Latino political network reception	Latino Victory Project board and donor network; Congressional Hispanic Caucus staff and allies; Latino policy professionals	Capitol Hill or Dupont Circle venue	$20K–$35K	Sprint 4

EVENT TYPE	AUDIENCE	VENUE APPROACH	TARGET YIELD	TIMING
Policy-community briefing	Criminal justice reform policy professionals; housing policy advocates; reproductive-rights professionals	Think tank or nonprofit event space	$15K–$25K	Sprint 4

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

City 4: Los Angeles

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

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

City 5: Miami

EVENT TYPE	AUDIENCE	VENUE APPROACH	TARGET YIELD	TIMING
Latino HNW dinner	Progressive Latino donors in South Florida; attorney network; reproductive-rights donors	Private home in Coral Gables or Coconut Grove	$35K–$50K	Sprint 5 (Jun 9–22)
Professional network reception	Hispanic National Bar Association–FL members; Latino professionals in finance and law; inter-American business community	Brickell or downtown Miami event space	$15K–$25K	Same trip

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

SECTION 3 — OPPOSITION CONTRAST MATERIALS (READY TO DEPLOY)

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

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

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

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

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

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

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

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

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

Combined 30-Second Frame

The 30-second frame for any audience:

"This race has three lanes. David Park is running a DC-establishment, national-money primary — $2.8 million raised, 95 endorsements, almost all from Washington insiders who don't live in this district. Thomas Hargrove is running a self-funded primary — $1.5 million of his own money, millions in defense contractor and oil company stock. I'm running a working-family primary — a daughter of immigrants who became a public defender who

became a state representative. The 12th District gets to decide which one of those belongs in Congress.”

SECTION 4 — SEGMENT-SPECIFIC CALL SHEET FRAMEWORKS

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

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

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

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

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

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

Call Sheet Framework: Latino / Identity-Network Donor

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

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

district. - The Latino community has the power to make this happen. But it requires resources, and it requires them now.

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

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

Call Sheet Framework: Criminal Justice Reform Donor

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

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

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

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

Call Sheet Framework: Labor Leader

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

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

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

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

Call Sheet Framework: Clean-Energy Executive

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

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

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

SECTION 5 — FEC QUARTERLY INTELLIGENCE PLAYBOOK

April 15, 2026 — Q1 FEC Reports Drop

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

Action plan — execute within 48 hours of filing:

HOUR	ACTION	OWNER
0–2	Pull Park Q1 report and Hargrove Q1 report via OpenFEC API. Download full Schedule A (individual contributions) and Schedule B (disbursements).	DFX / data team
2–6	Parse Schedule A for both committees. Build sortable spreadsheet: donor name, employer, occupation, city/state, amount, date. Flag all contributions >$1,000.	DFX / data team

HOUR	ACTION	OWNER
6–12	**Defectability analysis:** Cross-reference Park and Hargrove donors against Santos's donor segment model. Score each donor for alignment: (a) employer in a Santos-aligned industry? (b) occupation matches a Santos segment? (c) prior multi-candidate giving? (d) geographic overlap with Santos's donor cities? Flag top 50 defectable prospects.	DFX
6–12	**Contrast statistics:** Calculate Park's % of money from outside CA-12 (test the "DC money" frame with hard data). Calculate Hargrove's self-funding % of total. Calculate average donation size for both. Prepare one-page contrast stat sheet.	DFX
12–24	**Donor-tour intelligence:** For each donor-tour city (Riverside, NYC, DC, LA, Miami), identify all Park and Hargrove donors in that metro area. Cross-reference with Santos's scheduled events. Identify donors who gave to opponents but who are in Santos-aligned segments — these are warm defection targets for the donor tour.	DFX
24–48	**Campaign action:** Finance team integrates defectable prospects into sprint pipeline. Candidate reviews top 20 defection targets for personal outreach. Press team pre-positions contrast statistics with local reporters (Riverside Herald, Inland Valley Daily, CA Political Review).	Campaign

July 15, 2026 — Q2 FEC Reports Drop

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

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

SECTION 6 — SPRINT-BY-SPRINT PIPELINE

Sprint 1: April 14–27

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

TRACK	SPECIFIC ACTIONS	TARGET YIELD
Endorsements	Submit NPWF questionnaire. Email Latino Victory Project PD. Call WFUPAC national political director. Call SEIU Local 721 political director. Submit Planned Parenthood questionnaire. Submit Alliance for Justice Action application.	No revenue yet — building pipeline
High-dollar	Reactivate Santos’s top 25 State Assembly donors at federal max-out levels ($3,300). Identify 10 warm-intro prospects from existing network for $2,800 asks.	$25K–$40K
Events	Book Riverside HNW dinner for Sprint 2 (identify host committee of 3–5; each commits to raising $10K). Book Latino community celebration for Sprint 2.	Booking only — revenue in Sprint 2
Digital	Launch ActBlue page optimized for “first Latina from	$5K–$10K

TRACK	SPECIFIC ACTIONS	TARGET YIELD
	CA-12″ messaging. First 2 fundraising emails to existing list.	
Intelligence	Pull Park and Hargrove Q1 FEC reports (April 15). Complete defectability analysis within 48 hours. Deliver contrast stat sheet to finance team.	Intelligence product, not revenue

Sprint 1 total target: $30K–$50K

Sprint 2: April 28 – May 11

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

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

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

Sprint 3: May 12–25

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

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

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

Sprint 4: May 26 – June 8

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

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

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

Sprint 5: June 9–22

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

TRACK	SPECIFIC ACTIONS	TARGET YIELD
High-dollar	35 calls/week. Fence-sitters from Sprints 1–3 get urgency push: “July 15 is 3 weeks	$65K–$85K

TRACK	SPECIFIC ACTIONS	TARGET YIELD
	away." Defectable opponent donors get second outreach.	
Events	Execute Miami trip (Latino HNW dinner $35K–$50K; professional reception $15K–$25K). Third Riverside event (progressive HNW giving circle dinner $25K–$40K).	$75K–$115K
Bundling	All active bundlers receive "30-day push" ask: close outstanding pledges, bring one new max-out prospect each.	Incremental $20K–$40K
Digital	Deadline urgency email series: "31 days to July 15." Earned media from Miami trip.	$12K–$20K

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

Sprint 6: June 23 – July 6

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

TRACK	SPECIFIC ACTIONS	TARGET YIELD
High-dollar	40 calls/week. Every outstanding pledge gets a close call. Every warm prospect gets a final push. Candidate personally calls top 20 uncommitted prospects.	$85K–$110K
Events	Final Riverside HNW dinner ($40K–$60K). Final DC phone-a-thon (candidate + 2 phones, 4 hours, targeting uncommitted DC-based prospects).	$65K–$100K
Bundling	Final bundler push: "What you raise by July 13 shows up on the report. What you raise on July 16 doesn't."	$20K–$40K

TRACK	SPECIFIC ACTIONS	TARGET YIELD
Digital	Deadline countdown email series: “18 days… 11 days… 5 days… 48 hours.”	$15K–$25K

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

Close Week: July 7–13

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

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

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

SECTION 7 — WEEKLY INTELLIGENCE REQUIREMENTS

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

Monday Morning Brief (Delivered by 9 AM)

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

Quarterly Filing Intelligence (April 15, July 15)

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

Ad Hoc Alerts

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

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

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

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

LIKELY ATTACK	SOURCE	PREPARED RESPONSE
		taken out of context. DFX to provide this analysis by April 30.)

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

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

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

Story 1: "First Latina from CA-12 — The Public Defender Running for Congress"

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

Story 2: "The Self-Funder's Portfolio: Defense Contractors and Oil Companies"

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

Story 3: "95 Endorsements, But From Where?"

Target outlets: Riverside Herald, Inland Valley Daily (local first — statewide follows) **Timing:** After April 15 FEC reports confirm Park's donor geography is heavily DC/national

Hook: Geographic analysis of Park's endorsement list and donor base — what percentage are from CA-12 versus Washington and national? **Why it matters for fundraising:** Reinforces the "district roots vs. DC money" contrast. Makes Park's frontrunner status feel hollow to donors considering both candidates.

Story 4: "Labor Picks Its Candidate"

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

SECTION 10 — CAMPAIGN INFRASTRUCTURE REQUIREMENTS

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

REQUIREMENT	STATUS (CAMPAIGN TO FILL)	ACTION IF NOT IN PLACE
Finance Director with federal primary experience	□ In place / □ Needs hire	Hire immediately. This is the rate-limiting staff role. Without a FD who can run the sprint system, execute call sheets, manage events, and process pledges at speed, the plan underperforms.
ActBlue page optimized for the race	□ Live / □ Needs setup	Set up by April 14. Needs: candidate photo, biography, donation tiers ($25 / $50 / $100 / $250 / $1,000 / $2,800 / $3,300).
Email list (existing State Assembly donor file + supporters)	□ Imported / □ Needs import	Import into email platform (ActionNetwork, Mailchimp, or campaign CRM) by April 14.
CRM / donor tracking	□ In place / □ Needs setup	NGP VAN, ActBlue dashboards, or equivalent. Must be able to track prospect

REQUIREMENT	STATUS (CAMPAIGN TO FILL)	ACTION IF NOT IN PLACE
		status, pledge amounts, conversion dates, and sprint assignments.
Candidate calendar blocked for fundraising	□ Blocked / □ Needs scheduling	Block 4–5 hours/day (Tue–Thu) for call time. Block 1 event slot per weekend. Block 2-day windows for each donor-tour city trip. Non-negotiable for 14 weeks.
Compliance counsel	□ Retained / □ Needs retention	Federal campaign finance compliance. Must be in place before first bundled event.
Santos's own FEC data (Q4 2025 and Q1 2026 when filed)	□ Available / □ Needs pull	Pull from FEC.gov. Populate the "TBD" fields in the competitive landscape table. This is the most important data-quality task in the next 48 hours.
Self-opposition research file	□ Complete / □ Needs completion	Due April 30. Every roll-call vote, every public statement, every financial disclosure.

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

DFX Intelligence — Campaign Internal. Not for distribution.