



**TO:** Karin Johanson  
**FROM:** Peter Cari, Maura Dougherty  
**RE:** Moving forward  
**DATE:** January 6, 2014

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With the start of the new year, we wanted to put some thoughts on paper in hopes of starting a conversation about the campaign. We're concerned - both about the direction in which the campaign seem to be moving, and about the fact that our firm and the other consultants aren't involved or engaged in so much of what is happening. This is a campaign that is deeply important to us as a firm - we've worked with Wendy and her team for over six years and, as we've discussed, we've structured our workload and client roster for this cycle in such a way as to ensure that we have the time and resources to devote to being full members of this team. But that involvement isn't happening - and we haven't been able to get to the root of why it's not. We badly want to remedy this and find a way to be active, constructive members of the team as we undertake this massive endeavor.

This memo represents our thoughts on where things stand and we hope will start a conversation about how to make a course correction before it's too late. The following things are particularly alarming to us at this point:

- 1) There is a lack of leadership and our internal communications aren't working - leading to the underutilization of many of the people who could help get things on track
- 2) We don't have a clear strategy and the consulting team hasn't been engaged in a meaningful process to create one
- 3) We lack a message that will both increase base turnout **and** persuade voters in the middle - despite both groups being crucial to a Davis victory

The campaign is in disarray and is in danger of being embarrassed - both over the course of the next 11 months, and when the votes are counted in November. The level of dysfunction was understandable in July and August, when we had no infrastructure in place - but it doesn't seem to be getting better. With so much at stake for Texas families, this campaign has an obligation to make clear to donors, allies, and voters that this is not a vanity project, but a serious, professional campaign with a winning strategy that is making wise decisions and has a plan to deal with the attacks that will come at us.

We believe the campaign is at a crossroads. The following represents the current state of play from our perspective. We believe significant changes must be made in order to give Wendy a real chance at success in November.

- The team that got Wendy elected (twice) in a difficult district and has significant experience in red states and districts isn't involved in strategic decisions. Many of the staff on the ground have valuable experience on the Obama campaign and in swing states like Ohio, Pennsylvania, and Wisconsin - states that are technically competitive but perform very differently from Texas, particularly in a presidential

- year with Obama leading the way against Romney. But we need to be selling something very different from what works for Democrats in other states - and right now, we're not doing that. Lip service is paid to how different Texas is from swing states, but that stated understanding is not being put into practice.
- The consulting team is being under-utilized, and it is hurting Wendy and the campaign. The examples are endless, just from our personal experience. Our calls regularly go unreturned. When we are in touch, our advice seems to go into the ether - we have no idea if it's utilized or not, and if not, why not. This experience isn't unique to us - other members of the consulting team feel equally detached. We are in contact with our other campaigns - both statewide and local - multiple times in any given day, adding our advice (and often written product like press releases, planning memos, etc.) on everything from immediate press questions, earned media opportunities and scheduling, to longer-term strategic decisions. We have offered to fill that role here as well, to no avail. Even on issues directly in our wheelhouse like the announcement speech, we're not able to give input until well after the train has left the station, putting us at a disadvantage to provide constructive help. The only real access point to information is the weekly call - but more often than not, on that call we're informed of decisions that have already been made and are offered limited opportunity for input. On the most recent Thursday call, we were told that the campaign would spend the month of January rolling out education policy proposals. While this may make good sense, it demonstrates a major messaging decision being made without discussing it with a team of people who have experience that should be brought to bear. In past campaigns we were able to be a part of these discussions early on, leading to a more cohesive strategy and a better understanding of the issues when it came time to make the television ads. The process resulted in finely honed ads that helped Wendy overcome significant obstacles in two different races (and that research like Barbara Lee's indicate were highly effective and well done).
- We regularly find out that the campaign has taken positions or gone on the record on important or controversial issues by seeing it in the clips. This is particularly hard to understand when the consultants know Wendy's background so well from the previous campaigns - her political record, her personal history, her business career, and the negatives the Republicans will try to use against her. In recent weeks, the campaign has had stories about the old libel suit against the Star Telegram, Wendy's position on drivers' licenses for illegal immigrants, and the release of Wendy's tax returns, among others. We weren't consulted on any of these. Our point here is not to say that these stories were handled poorly - simply that we should have been brought into the discussions. These are issues that will crop up throughout the course of the campaign - yet we're not being given an opportunity to weigh in on possible responses or positioning.
- When we do hear about things that are happening and try to engage, our advice seems to go into a black hole. In recent weeks, we've tried to engage with the campaign on preparation for the Today Show interview, the radio plan, and the economic messaging coming out of the poll, among other issues. In each case, we get little to no response to our efforts - we don't know if people agree or disagree with our recommendations (though the lack of response leads us to believe that people

disagree), or even if our emails are being read. It's hard for us to calibrate our work to what is most helpful to the campaign because we receive no feedback on our efforts. Our attempts to follow up are generally unsuccessful because our calls go unreturned. Again, this frustration is felt by other members of the consulting team.

- Strategic discussion is difficult and it often feels as if discussion is being stifled. We understand that this is a big, unwieldy team to manage, but the messaging project is a good example of what we mean. In red states, a positive messages is most useful for two things: inoculating against hits that the Democrat is too liberal, and setting up the contrast with the opponent. When we made suggestions on the Saturday poll call to better ensure these goals would be accomplished, we were quickly shut down and told other decisions had already been made. When advice is so readily dismissed, it discourages participation and leaves everyone walking on eggshells.
- Access to Wendy is too limited, with too little ability to discuss issues as a team. In previous campaigns, the consultants were able to discuss important decisions directly with Wendy, giving her and us a better understanding of one another's thinking.
- We've sent preliminary media budgets - and had to send follow up emails just to ensure they were received. There's been no discussion, leaving us with no feedback and no ability to refine them.
- We have repeatedly offered to be part of the micro targeting and vote goal programs but have heard nothing on either issue.
- We have offered to produce video content for the web using either newly produced material or footage collected when we shot the announcement video. We have heard nothing back on this but have repeatedly been sent videos to "improve" or "clean up" that we neither wrote nor shot. We're more than happy to be helpful on an ad-hoc basis, but we've asked a number of times to have a broader conversation about video content and how we can help ensure that everything the campaign puts out is high-quality, looks professional, and advances our message - whether we're shooting/producing it, or just working with the team on the ground to accomplish those goals. Again, we've gotten no response.
- In August and September, we spent significant time - both on the ground in Texas and from DC - trying to get the press shop up and running, interviewing potential staff, building a bank of written materials, and trying to be a part of the strategic planning process. We *want* to be involved in that kind of hands-on fashion. We have offered to spend time on the ground, working with staff and expanding the campaign's capacity - and we've planned our cycle specifically in order to have the time to do that. But we need someone to engage with in order for those efforts to be productive. We can't simply be voices in the wilderness, making suggestions that go unheeded. But we've heard no response to our offers.
- Every consultant is frustrated and agrees that the campaign is in trouble. It isn't just one or two people, on one or two issues. These are fundamental problems, and everyone, to varying degrees, recognizes that. There is a team of experienced people ready to help - and we're all wondering why we're not being asked to do so.

As a result of all these factors, in a significant departure from Wendy's successful Senate races, the campaign has lurched to the left over the last few months, at least in part because the team on the ground does not seek or heed our advice. Since the announcement video we produced - the goal of which was to position Wendy the way the team wanted the press and voters to see her - Wendy has been portrayed as being in favor of gun control, drivers licenses for illegal immigrants, and Obamacare. This is hardly the image we want to project.

There is not a model where a candidate who appears this liberal and culturally out of touch gets elected statewide anywhere in the south - much less in Texas - without some inoculation. To date, we've made no moves toward the middle (outside of the announcement speech and video) to give people some assurances that Wendy is not the doctrinaire liberal the Republicans will paint her as. We are worried that no one handling the messaging for the campaign has the natural instinct to find ways to center the message. Currently, our message path is indistinguishable from that of national Democrats or even President Obama. Not only is this strategically unwise, it is a departure from Wendy's true record.

Nobody associated with this campaign - or, frankly, in the country - has done what this campaign is attempting to do. We have been given many advantages because of the work Wendy has done and the groundwork laid by the filibuster. We have access to a motivated, energized group of supporters. But the chant from Texans in the late summer and fall was, "Run, Wendy, Run," NOT "Run left, Wendy, run left." We need to overcome a decades-long partisan disadvantage in Texas, and that will not be easy to do. We need to embrace the expertise of those from the Obama campaign and others who know how to increase the base vote and harness the incredible energy available to us - but we also need to tap into the experience and knowledge of the people who have experience winning enough swing voters to be successful in Texas. In order to be successful, this needs to be more of a team effort - one where people are encouraged to add their experience and expertise.

The lack of engagement with us and others on the consulting team leaves us with two possible conclusions: either the campaign is desperately in need of the strategy, leadership, and internal communications structure that will allow it to begin functioning as a competitive statewide effort, rather than a cause campaign; OR, there has been a decision made to run Wendy not as a moderate Texan who could plausibly beat Greg Abbott, but rather as a national Democrat, appealing to liberal donors in the mistaken belief that there is a hidden liberal base in Texas that will turn out to vote if they have a liberal candidate to support. Frankly, either scenario means that real changes need to be made, and quickly.

We all agree that Texas needs new leadership. We all know that Wendy has inspired people who've never been a part of the process before, presenting an amazing opportunity. But that's not enough. We need to make changes quickly - or else we're wasting the time of the people volunteering, squandering the money of the record number of contributors who have dug deep to help, and forfeiting a real chance at making history by getting Wendy elected governor. Wendy deserves much better than that - and we badly want to be a part of running the kind of campaign that can make that a reality.