CHAPTER 1

When the Fools Were Right

LIGHTOLLER : "I've been at sea since I was a boy . . .. I've even been
shipwrecked before. I know what the sea can do. But this is different."

GRACIE : "Because we hit an iceberg?"

LIGHTOLLER : "No, because we were so sure. Because even though it's
happened, it's still unbelievable. I don't think I'll ever feel sure again, about
anything."

A Night to Remember, 1958[1]

Activists are so traumatized by 2016, and they're so terrified of
revisiting that night and having it all happen again.

Iowa political activist, 2019

I'm not putting another fucking dime in until someone tells me
what just happened.

Democratic Party donor, December 2016[2]

This was supposed to be a book about Republicans. In the summer of
2016, I had an idea for a book chronicling how the Republican Party dealt
with their embarrassing loss to Hillary Clinton. Surely they were going to
have to rethink how their presidential nomination system worked, why it
utterly failed in 2016, and how a patently unelectable candidate like
Donald Trump somehow got the nomination and cost them an election
that was obviously theirs to win. It would be a difficult period of self-

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[1] ITV Archive.
[2] Tina Nguyen, 2016. "Democratic Donors Say Their Money Buys Them an Explanation."
Vanity Fair, December 16.

reflection for the GOP, and it seemed like something that would be fascinating to observe in action.

Yeah, it would have been. Obviously, and much to nearly everyone's surprise, something very different happened that fall. That period of Republican self-reflection has been postponed. Instead, that mantle was passed to the Democrats, who engaged, both at an organizational and personal level, in an extensive and grueling conversation about what exactly happened in 2016 and what to do about it.

This is a book about that conversation. Everything that you've heard about the challenges and weirdness of the Democratic presidential nomination of 2020 stems, I argue, from that conversation about 2016. And the Democrats' ultimate decision to nominate former Vice President Joe Biden, and the divisiveness within the party that followed from that, similarly was a product of the party's conversations and fights about the previous election.

I want to start off by giving an example of such a conversation. Imagine a meeting of the Coca-Cola product development team in 1986. (I doubt this exact meeting happened, but let's assume something along these lines did.) The company is still reeling from the surprising and embarrassing failure of New Coke a year earlier. It had seemed like a smart idea at the time, and all their sophisticated market research had suggested it would sell well. Instead, it quickly became a laughingstock, and the company lost crucial market share to Pepsi-Cola.

Importantly for this example, the people in this meeting room can't agree why New Coke failed. Some think the flavor just wasn't that good. Others think the flavor was fine – possibly better than the earlier version of Coke – but that they had advertised the product poorly and scared off the customers they were trying to woo. Others think that soft drink consumers were far more resistant to new products and new ideas than originally thought. Still others blame things totally outside Coca-Cola's control – FDA product warnings, small independent soft drink products, etc., – for the catastrophe.

But the argument in this meeting room is vitally important, because coming up with a narrative for New Coke's failure is vital to figuring out what to do about it. If the room decides New Coke failed because it tasted bad, they may abandon it altogether and scramble to find

a better flavor. If they decide it was good but marketed poorly, they might keep the product but change their advertising strategy. If the problem was independent soft drink manufacturers, maybe they try to co-opt some of them. And so forth. But if they simply can't agree on what went wrong, they might just choose what they see as the safest possible response – going back to the old formula that worked for them previously.

Without drawing out the analogy too far, this is essentially what the Democratic Party faced after the 2016 presidential election. The party, broadly defined, struggled to come up with a reason why Hillary Clinton had lost to Donald Trump. That election's outcome was stunning and disorienting for people in the party. They couldn't agree on a narrative – was the problem Hillary Clinton? Her gender? Her policy stances? Her speeches? Was it the way the party campaigned for her? The messaging her campaign used? Did it have something to do with Russian interference? Or James Comey? Or Bernie Sanders? Was the electorate more sexist or racist than Democrats had calculated after two terms of Barack Obama's presidency?

And as in the above example, the narrative is vital for telling the party what to do next. Should the party avoid nominating a woman or a person of color to avoid alienating moderate white men, or should it definitely nominate such a candidate to boost minority turnout? Should it nominate a Midwesterner? Should it move to the center or to the left? Should it strengthen or weaken its own control over the nomination process? Or was 2016 just the electoral equivalent of an act of God, meaning the party shouldn't try to change how it operates or the sort of candidate it nominates?

This is a book about election narratives, the stories we concoct about why a complex set of events came out as it did. These narratives, regardless of how accurate they are, can be very powerful in guiding the behavior of parties and political actors, especially for a party that lost. They have a substantial impact on the decisions a party and voters attached to that party make for the next nomination contest. Importantly, when a party can't agree on a narrative, that makes the job of picking the next nominee that much harder. And sometimes, as Coca-Cola did, a party might just decide to reject innovation and fall back on

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a formula they believe worked in the past. This, I will demonstrate, is what happened to the Democratic Party in the lead up to 2020.

Now "product innovation" means something very different for a party than it does for a soft drink manufacturer. The Democratic Party is an ideological organization, and its core ideology is inclusiveness. Like any party, it will periodically struggle with how much of its core ideology to sacrifice to the god of electability. The Democrats, struggling with determining a narrative about 2016 and facing a daily onslaught of Donald Trump's policies, norm violations, and tweets, settled on what they perceived as a safe option, determining that a moderate white man, the sort of nominee they've turned to in past competitive elections, was the best way to secure a win. This wasn't an overtly declared party position, of course, but as the evidence I'll present in this book suggests, this was the subtext of a great many conversations going on within the broader party. This conversation made the nomination of Joe Biden, or someone like him, a lot more likely than it would have been in a different political environment.

Some news coverage of the political events of late February and early March 2020 made it seem like Joe Biden's nomination was a last-minute fluke, that his flailing campaign was rescued by a lucky combination of timing and candidate withdrawals. The research I present here suggests otherwise. A substantial portion of Democratic insiders, including activists and donors and party leaders, had already decided on him as the party's standard-bearer long before anyone started voting in Iowa. They had done so in large part due to their interpretations of 2016 and their strong desire to avoid repeating that election's outcome.

For this book, I examine the Democratic Party during the process political scientists refer to, with some inconsistency, as the Invisible Primary. I define the Invisible Primary as stretching from the day after the November 2016 presidential election to just before the February 3, 2020 Iowa Caucuses. It is the period in which Democratic leaders and insiders tried to comb through the wreckage of the Clinton campaign, determine what happened, and make some decisions about how to change the party and which candidate to pick the next time around. Notably this time period ends just before voters and caucusgoers weighed in. Obviously, their input is vital to a presidential nomination, and I will

discuss some of those early contests toward the end of the book. But I am mainly interested in how party leaders, insiders, and organizers made (or failed to make) decisions before they had direct guidance from voters. This is instructive about just what a modern party is capable of.

My focus on one party during one presidential cycle is important for two somewhat contradictory reasons. For one, the 2016 presidential election was an unusual one, with surprising results in both the major party nomination processes and in the general election. It was a stunning outcome that was disorienting and even traumatizing for Democratic activists and other political observers. For another, despite how unusual this example is, it is highly revealing about the behavior, capabilities, and limits of a modern American political party. If we want to understand how a party responds to a shock, absorbs information and attempts to learn from it, and both guides and is guided by perceptions of what voters will and won't accept, we could hardly find a better example.

A SHOCK TO THE SYSTEM

I want to be transparent about the environment in which these party decisions were taking place and the motivation for this book. The disorientation experienced by many within the Democratic Party in the wake of 2016 was shared by quite a few political observers and political scientists, including me.

In the summer of 2015, I was interviewed by Graeme Hamilton, a political reporter with Toronto's *National Post*, about the developing contest for the Republican presidential nomination for 2016. Canadian readers, Hamilton informed me, were hearing quite a bit about Donald Trump, and he wanted to know my assessment of Trump's chances. "Donald Trump won't be nominated," I confidently told him, "and he won't be elected president." Hamilton seemed surprised by my certitude. "You're making a very strong claim," he noted. "Do you worry about your academic reputation?" "If I'm wrong about this," I responded, "my academic reputation will be the least of our concerns."

I wish to be clear that this book is neither a partisan diatribe nor a strategic memo for one party or the other. The book is about reaction to a set of shocking events. The first of these events was, of course, the

nomination of Donald Trump as the Republican candidate for president. Lacking previous political or military experience, he was obviously not the sort of candidate major parties typically nominate for the presidency. But perhaps more importantly, he won the nomination without the blessing of party leaders. He was precisely the sort of wealthy political neophyte who occasionally runs for high office and fails because the party does not trust him to follow through on issues they care about, and he won its nomination anyway. His nomination ran against most leading theories of the way party nominations work and against a good deal of my own scholarship. In general, only the fools think the candidate with nothing more than an early lead in public opinion polls will win the nomination; wise people will focus on the candidate with the bulk of party insider support. In 2016, the fools were right.

The second event was Donald Trump's election in the fall. To be sure, if the history of presidential elections tells us anything, it's that open-seat elections in middling economies are tossups. With more typical nominees, 2016's presidential race should have been a very competitive one. But Hillary Clinton was leading by substantial polling margins – sometimes in the double digits – throughout the year. It wasn't like political observers were making up some esoteric theories to predict a Clinton victory. We predicted a Clinton victory because we asked voters how they planned to vote and that was what they told us. The idea that reliably Democratic states like Wisconsin and Michigan, where polls reported healthy Clinton leads right up until election day, would somehow go Republican at the last minute seemed too bizarre to believe.

As a scholar, I needed to understand just what had happened. Were these one-off events, driven by unusual political conditions and the unique aspects of Trump's fame, wealth, and personality? Or had the political system changed? Were parties now running under new rules, and were elections far less predictable than previously thought? The Democratic Party was suddenly in the position of evaluating what had happened, as well. Were they just as vulnerable as the GOP to a famous outsider taking their nomination? Did they need to change their nomination process? What exactly did "electability" mean? And what kind of candidate were they supposed to nominate next time around to address this situation?

WHEN THE FOOLS WERE RIGHT

THE IMPORTANCE OF NARRATIVE

The way a political system generally deals with these questions is through the construction of narratives. "What unites people?" asked Tyrion Lannister in the final episode of *Game of Thrones*. "Armies? Gold? Flags? Stories. There's nothing in the world more powerful than a good story. Nothing can stop it. No enemy can defeat it." He made some bad calls that season but this was a pretty good observation. Narratives are a convenient way of breaking down a complex event like a national election into an understandable story or moral. As political scientist Marjorie Hershey notes,[3] an election is a terribly blunt tool for representation and accountability. For any given electoral race, voters usually just have two choices and don't get to say why they're voting the way they're voting. (And polling questions after the fact are filled with all sorts of biases.) A politician may just be told she received 52 percent of the vote – it's a win, but what did it mean beyond that? Did it mean the ads she ran were effective? If so, which ones? Did it mean her efforts were better than her opponent's, or that the district was already drawn to be favorable to her? Did it mean her volunteers were appropriately enthusiastic, or not enough? Was she well positioned on the issues, or should she move to the left or the right? One won't learn these things by poring over election returns.

This is where the narrative comes in. Political reporters and observers, campaign staff, pundits, scholars, and others will examine the race, look at polling and spending and turnout data, perhaps review experiments conducted during the campaign testing the effectiveness of various campaign activities, and look at many other things and render a verdict about just why the candidate lost.

Here's the uncomfortable part – a lot of what we think is important in elections turns out not to matter that much. Let's just focus on presidential elections for a moment here. Since 1988, no major party presidential nominee has received less than 45 percent of the two-party vote. That doesn't mean it can't happen – Reagan, Johnson, and Nixon won by twenty-point blowouts in the decades preceding that. But we're in a more

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[3]   Marjorie Randon Hershey, 1992. "The Constructed Explanation: Interpreting Election
       Results in the 1984 Presidential Race." *The Journal of Politics* 54 (4): 943–76.

stable partisan era at the national level[4] and presidents just don't win in landslides anymore. Which means that around 90 percent of the vote is already accounted for before the campaign even starts. Voters are largely going to vote for the party they are already leaning toward.

Now, that still leaves some portion of the electorate open to influence. But it turns out a great deal of their behavior can be explained by the "fundamentals" of elections. These include things like the performance of the economy, conditions of war or peace, and the length of time the incumbent's party has held control of the White House. You can come very close to predicting a November election several months earlier, long before the major portion of the campaigning takes place, just by knowing how well the economy is performing and how long the president's party has controlled the White House.

And then you have some degree of random chance. You might get bad weather in one area of the country that lowers turnout. A new voting machine might fail. A ballot might turn out to have a confusing design that advantages one candidate over another. A news story might break at the last minute that casts a candidate in a bad light. All of this is possible but still very hard to predict, and it is largely outside the campaigns' control.

So after voter partisanship, the campaign fundamentals, and random chance, just how much of the electorate is left for the campaigns to actually influence through advertisements, speeches, yard signs, and door-knocking? That's difficult to measure, and the numbers will jump around from election to election depending on the circumstances, how much people already know about the candidates, etc. But it's not a large number.

This is often where political scientists and political consultants get into fights. Political scientists often speak of the relatively small or "minimal" effects of campaigns, pointing instead to the vast influence of the fundamentals. Consultants tend to argue that the campaign strategies they honed, the advertisements they deployed, the speeches they wrote, etc., were pivotal in the election.

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[4] Frances E. Lee, 2016. *Insecure Majorities: Congress and the Perpetual Campaign.* Chicago: University of Chicago Press, 2016.

And honestly, scholars and consultants aren't disagreeing about all that much. Consultants know that a good deal of the electorate is immune to their handicraft, but they must be focused on that portion of the electorate that they can influence. They just might disagree with scholars about how large that portion is.

But regardless, we're not talking about big differences. Yet there will only be one winner, no matter how close the election was, and at that point some familiar narratives will kick in. Anything the winner did will be presumed to be the correct thing to do to win an election. But the loser will be presumed to have *done something wrong*. Any decision the loser made during the campaign will be suspect. The narrative will quickly be constructed based on the idea that the loser and winner would change places if the loser had just done that one thing differently.

A familiar refrain, almost to the point of a punchline, was that Hillary Clinton "should have gone to Wisconsin." Indeed, Clinton did not make any campaign stops in Wisconsin in the fall of 2016, while Trump made five,[5] and the Badger State went for a Republican presidential candidate for the first time since 1984. So it seems on the surface that Clinton's decision to ignore the state was a costly error. But what does the evidence say? For one thing, Clinton was up by an average of five points in tracking polls in the state just prior to the election. All the publicly released polls in the final two weeks had Clinton ahead, from one to twelve points. Diverting campaign resources from states that seemed competitive right before the election to one that looked safe would have looked like a grave miscalculation at the time.

What's more, it's not remotely clear that this would have helped her. According to pre-election polls, Clinton was up by similar margins in Wisconsin, Michigan, and Pennsylvania. She devoted only minimal resources to Wisconsin, modest resources to Michigan, and massive resources, including advertisements, visits, and field organization, to Pennsylvania. She lost all three states by about a percentage point. If all

[5] Candace Smith and Liz Kreutz, 2016. "Hillary Clinton's and Donald Trump's Campaigns by the Numbers." ABCNews.com, November 7. https://abcnews.go.com /Politics/hillary-clinton-donald-trumps-campaigns-numbers/story?id=43356783.

that campaign effort couldn't save her in Pennsylvania, why would we think it would matter in Wisconsin? But the critique sticks nonetheless.

Narratives will also be created about the nature of the country itself. Think for a moment about the descriptions of the American electorate immediately after the 2016 election. Pundits were taken aback by the results. They described the racial resentment, outrage, and anxieties motivating the electorate. Those election results painted a picture of a divided society that was making little progress toward its goals of equality and justice; people lived in silos and did not understand one another. Rural whites felt frightened by the pace of social change, while coastal elites ignored or belittled them.

Now think about the descriptions immediately following Barack Obama's election in 2008. The *New York Times* described Obama as "sweeping away the last racial barrier in American politics." His election was "a national catharsis . . . a strikingly symbolic moment in the evolution of the nation's fraught racial history, a breakthrough that would have seemed unthinkable just two years ago."[6] A Tom Toles editorial cartoon claimed that the proposition in the Declaration of Independence that "all men are created equal" was ratified on November 4, 2008. Michael Goodson, writing in the *Indiana Post-Tribune*, reflected,

> The phrase, "never in my lifetime," overused in the past, is very appropriate in the election of Barack Obama. Certainly, there are cultural characteristics that pass from one generation to the next, and the troublesome aspect of racial prejudice is one of them. It took over 100 years to get from slavery to civil rights in the 1960s, and almost 50 years more to get to this transformational plateau of electing an African-American to our highest office.[7]

Accounts of those two elections depicted two vastly different countries. Yet those elections occurred only eight years apart. The country had changed little in the interim. Indeed, the country was more racially

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[6] Adam Nagourney, 2008. "Obama Elected President as Racial Barriers Fall." *The New York Times*, November 4. www.nytimes.com/2008/11/05/us/politics/05elect.html.

[7] Michael Goodson, 2008. "Americans Seem to have Arrived with Obama." Indiana *Post Tribune*, November 20, p. A10.