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Memo

DATE: April 26, 2005
TO: Friends and Interested Parties
FROM: Mike Fogelberg, Political Research and Donor Advising
RE: November 2004 and Strategies for Winning in 2006, 2008 & Beyond

Executive Summary—Republicans won the 2004 presidential election with a national messaging strategy and a centralized, party-directed field effort integrating state and federal candidates' campaigns, state ballot initiatives and political advertising. Republicans proved superior connecting voters to issues (values), which they linked to a vote for their candidates, tying the elections and voting to a compelling vision and right-wing policy agenda. The victory was another achievement of a right-wing movement that organized resources over a period of years around a national strategy to win political power and implement a conservative social and economic policy agenda.

To counter these achievements and address local and global social and economic challenges with progressive leadership and policies, liberal and progressive foundations and individuals need to support a countervailing set of institutions and initiatives. These institutions and initiatives need to:

- Engage, educate and organize new and infrequent voters year round
- Establish linkage between voters' well-being and voting
- Register and motivate voters for participation in the 2006 and 2008 elections and beyond
- Organize issue campaigns around strategic initiatives that are the basis for national electoral majorities
 - National security
 - Social Security
 - Jobs and sustainability
 - Universal healthcare
 - Public education
- Develop and employ majority themes, framing and messaging to support public action to address universal needs
- Recruit elected officials to this strategic agenda
- Feed leaders into candidate development programs
- Target resources to politically competitive regions and states

November 2, 2004

Republicans won the 2004 presidential election with a national messaging strategy and a centralized, party-directed field effort and integrating state and national candidates' campaigns, ballot initiatives, and media advertising, tying the elections to a compelling national vision and right-wing policy agenda. Republicans proved superior connecting voters to issues (values) which they linked to a vote for their candidates.

- A centralized and multifaceted Republican message, field and get-out-the-vote program beat a decentralized Democratic-side message, field and GOTV program.
- Republican message was centrally coordinated with field by the Republican party. On the Democratic side, the Kerry campaign, the party, and allied efforts ran separate and multiple message and field programs.
- Republicans pulled significant pluralities of votes for Bush from important swing constituencies: white working class people, elderly and Latino people. While Democratic-side registration and GOTV exceeded their targets and the majority of new voters went to Kerry (53%-46%), these accomplishments were off-set by Republicans' voter registrations, higher turnout from their base, and the support of working class, elderly and Latino people.
- On November 2, 2004, Democrats lost not only the Presidency but also control of the US Senate, due to the Republican pick-ups in Florida, Georgia, Louisiana, North Carolina, South Carolina and South Dakota, and, lost additional seats in the US House, largely as a result of redistricting in the South, and especially Texas. Despite these losses, there were important and instructive victories in the US Senate, House and in state legislatures around the country.

Republican Messaging Defined Voters' Choices

The Republicans successfully moved their issues and Bush's perceived strengths to be the decisive considerations in a majority of voters' minds. Republicans polarized the electorate using religion, social and lifestyle issues (cultural values), terrorism in the US, and the war in Iraq to increase turnout among religious and ideological conservatives, and to pull a sufficient number of swing voters from three key groups: low and moderate income working people, elderly and Latino people.

Republicans used three key messages to galvanize their base and clinch the support of the pivotal swing voters: 1) terrorism is a threat in the US and Bush can provide greater national security 2) US military action is the right response to the bombing of the World Trade Center, and 3) Bush will protect and defend traditional family values and rural and working class lifestyles from attack.

Republicans displaced economic and other interests (jobs, healthcare, social security, education), elevating national security concerns and wedge cultural issues. This strategy effectively attracted support from voters that would prove decisive to the outcome of the election: white working class, elderly and Latino voters. These were people who, while not in love with Bush, did not harbor deep animosity either.

Of course, the Bush campaign benefited immensely from US military action in Afghanistan and the war in Iraq, as they actively identified national service in a time of crisis with the military effort. Likewise, they effectively deployed small town and working class lifestyle issues (opposition to gay marriage, abortion and gun control). *These issues were deployed in a systematic and coordinated program and were pushed ahead of other concerns that might have motivated greater numbers of voters to choose Kerry.*

Republicans Pulled Their Voters In and Pushed Democratic Voters Out

In the field, Republicans conducted a voter registration and turnout campaign that offset and even matched, in certain states, the efforts by Democrats, constituency- and issue-organizations. The GOP's effort was not publicized, announced or otherwise outwardly promoted. The "stealth" campaign increased Republicans' numbers among multiple constituencies and took Democratic leaders and activists by surprise.

Conventional assessments of voter contact efforts use polls to collect data over the phone on formal voter contact efforts (direct mail, television advertising, phonebanking, door-to-door) carried out by labor unions, political parties, gun groups, anti-abortion and women's groups, etc. The number of contacts is estimated, their significance measured, and voters' responses tallied. But the Republican stealth campaign operated outside of these formal efforts and occurred without fanfare and public attention through informal social networks, networks that are omitted from the standard voter contact assessments.

Conservative activists, organizations and voters were mobilized throughout the second half of Bush's first term. The Administration, and Republican leaders in the House and Senate pushed an aggressive right-wing agenda designed to motivate conservative activists and reach deeper into communities of conservative voters. State ballot campaigns to prohibit gay marriage were organized in select states to give the culture war a new political objective and recruit more Republican voters to the polls.

And finally, in the offices of Secretaries of State and elsewhere, Republicans undertook a systematic effort to prevent Democratic voters from voting and exclude from the count ballots that were cast for Democrats. These efforts were especially prominent in Ohio. These actions included manipulation of voter lists, challenging voters' legitimacy at the polling stations, and provision of too few polling machines at Democratic polls to increase waiting time.

Republicans Put Field And Message Together To Win The Election

Republicans won the 2004 presidential election with a centralized, party-directed field effort and a national messaging strategy, tying voting to a compelling social vision and a right-wing policy agenda. This was an integrated strategy coordinated through state and national candidates' campaigns, state ballot initiatives, and media advertising.

The Republican's message strategy was centrally coordinated with their field operation and GOTV program. Republicans got their base out to vote, added voters to their base, and convinced segments of Democratic constituencies to vote for Bush for president, in particular white working class voters, elderly voters, and Latinos. Republicans' targeting was advanced by the use of data from Scarborough Research, a consumer data bank, that helped the Republicans segment voter groups by market data and apply this analysis to devise a cable and closed-circuit television advertising strategy.

Democratic-side messaging was partitioned between the party, the candidate and numerous field and political advertising efforts. The Democratic-side message was weak on content and was not integrated into a strategic field and GOTV program.

Still, the new voters brought to the polls largely went to Kerry, as Democratic-side efforts exceeded their goals for voter registration and turnout. But none of the agents could deliver a cogent message addressing the economy and jobs, social security and healthcare, terrorism and national security. While there were unprecedented efforts to work collaboratively and coordinate, operationally these efforts were undermined by a divided field and message structure, and the absence of a unified strategy.

The Democratic side ultimately failed to reach the swing voters who decided the 2004 election, and it was voters from three pivotal groups that Bush pulled his victory.

Working Class, Elderly and Latino Voters Put Bush Back in Power

While much has been asserted about Republicans' turn-out of ideological and religious conservatives in Republican states, these voters were not decisive to Bush's win. These voters did boost the national total for Bush and give him a majority in contrast to November 2000. According to various analysis, religious conservatives amounted to approximately 17 percent of the voters in 2004, up by 3 percent from 2000. These voters boosted his number in solid Bush states, but they were not decisive to Bush's election according to the electoral vote. More decisive were three groups: low and moderate income working class people, elderly and Latino people.

Low and moderate-income working class people: The single most critical swing constituency in American politics are comprised of low and moderate-income working class people. Voters without college degrees comprise 58 percent of the electorate. How this group votes largely decides Presidential and Senate elections. This constituency is populist, and harbors a strong dislike for social and economic elites. While Clinton pulled voters from this group back in to the Democratic column, Kerry, along with other Democrats before him, lost this constituency because they failed to deliver an economic and national security message that these voters could support. The undecided voters in this group shifted into the Bush column in the last two weeks of the campaign.

Stan Greenberg writes, "the most striking feature of this election" was the "inverted class election among white voters – with the very best educated voting for Kerry and the least educated voting for Bush." According to Greenberg's post-election poll for the Institute for America's Future, the successes of the Kerry campaign and Democrat-related voter turnout efforts were "swamped by the shift of downscale voters in the final week and a half...." These downscale voters were largely white and female, but included people of all races.

“In the end,” write Greenberg and Carville, “Kerry was unable to make the economy a central point of choice and change or break through with his vision for creating better jobs with more affordable health care. When that became apparent in the last week, large sections of downscale America shifted, opting to vote their values, rather than their economic worries. That produced a cultural surge at the end, an intensified polarization that took down many Democrats in rural states and the South, that diminished their blue collar support generally and that allowed George Bush to get a national majority from red America.” (Greenberg and Carville)

Reviewing exit poll data, Ruy Texiera finds that “white working class voters were responsible for almost all of Bush's increased margin among whites as a whole (which went from 12 to 17 points). And Bush's increased margin among whites, of course, was primarily responsible for his re-election.” The swing to Bush was overwhelmingly from “white working class women, rather than white working class men.... Bush won white working class men by almost identical margins in the two elections (29 points in 2000 and by 30 points in 2004). But he substantially widened his margin among white working class women, going from a 7 point lead in '00 to an 18 point lead in '04. That 11 point swing against the Democrats among white working class women is arguably the most important single fact about the 2004 election.”

According to Texiera's analysis, single and married women moved equally to Bush. The reasons? National security and the economy. Women came to share the view of many of their male counterparts that the Bush would do a better job handling the economy: *“55 percent of these voters said they trusted Bush to handle the economy and only 39 percent said the same about Kerry.”* (Texiera)

The Elderly and Older Women: The second tier of voters to swing to Bush included elderly people, and women over 50. These voters were pulled to

Bush by Republicans' successful marketing of the threat of terrorism in the US. Kerry lost these voters when he dropped social security and healthcare from his campaign message and drifted onto the Republican turf of terrorism and national security. These voters also swung into the Bush column in the last two weeks of the campaign.

Latino People: In the third tier, and emerging in importance as a national constituency, Latino voters delivered Republicans the largest share of their votes for a presidential candidate yet. Though the majority of Latinos voted for Kerry, Bush won more Latino votes than any other Republican candidate, and Latinos were critical to the Bush victory in New Mexico. Representing 8% of voters in 2004, approximately 40% of Latinos voted for Bush, an increase of approximately 6% from 2000. Bush increased his vote among Latinos in large measure due to the weakness of the Democrats' economic program for working class people, but also as a result of Republican work through the Catholic Church.

Working Class, Elderly and Latino Voters in Five States

Below is a sketch of the significance of the decisive constituencies described above to the outcomes of the 2004 election in five states. A deeper assessment is needed, one that draws on interviews with activists and candidates, as well as polls. But here are some basic assessments.

Kerry in Florida

New voters in Florida made up 13% of the turnout and supported Kerry 56% to 43%. But despite the massive Democratic side GOTV efforts in Florida, GOP efforts were more effective. "Democratic turnout grew by a total of 471,000 votes. But Republican turnout increased by 873,000 votes...." (Gersh). Kerry lost 47% to 53%. *A glaring omission, Kerry did not use the minimum wage ballot campaign to his advantage, overlooking an easy chance to bridge field and message and reach swing working class voters for the benefit of his campaign.* Voters passed the ballot

measure by 71%, but Kerry lost among voters with no college degree, 49% to 50%. Here too, reflecting the weakness of the Democratic side's organization around message, elderly voters supported Bush 52% to 47%.

Kerry in Ohio

In all likelihood, the Kerry loss in Ohio (49%-51) was due to the effective efforts at *voter suppression prior to the election, in particular the purging of registered voters from active status in 2001, 2002 and 2003, and the allocation of voting machines and provisional ballots on election day.* That being the case, Bush nevertheless increased his support from people of modest means and people over 60, reflecting the same pattern of problems found in other states. Bush received greater support from voters with a high school degree (+5), without a high school degree (+12%), and from people over 60 (+10). New voters comprised 15% of voters and 54% supported Kerry.

Kerry in New Mexico

Kerry's loss here (49%-50%) can be attributed to *Bush's significant support from Latino's (44%), an increase of 12% over 2000.* Voters with no college degree supported Bush 51% to 48%. Kerry did better here with people over 60, winning these voters with 55% of their votes. *Despite the efforts of Gov. Bill Richardson's organization, conservative social values, the activism of Catholics, and Kerry's weak economic message combined to give Bush the state.* And Kerry did less well among new voters in New Mexico, securing only 51%, in contrast to 54% in Ohio and 56% in Florida.

Kerry in Pennsylvania

Kerry won in Pennsylvania (51%-49%) with *the votes of low-income people, largely African American, who turned out massively in Philadelphia and Pittsburgh.* Black turnout surged to 737,584, an increase of 393,650 (+47%) over the 2000 election (Belcher and Brazile). Again, reflecting the weakness of the economic and social security/healthcare

message coming from the Kerry campaign, seniors in Pennsylvania went for Bush, 52%-48%, an increase for Bush of 12% over 2000. Bush also won among voters with incomes between \$30-\$50,000, 51%-48%. New voters made up 16% of the turnout and supported Kerry with 59% of their votes.

Kerry in Wisconsin

Kerry squeaked out a win in Wisconsin by less than 12,000 votes, 50%-49%. Close as it was, Kerry actually doubled the margin over Gore's in 2000. It was the closest of his wins after New Mexico in raw votes. *Unlike other battleground states where Kerry lost, Kerry won in Wisconsin with the votes of people earning less than \$50,000 (55% - 44%) and significantly, he won among people over 60 (51% - 49%).* New voters here supported Kerry by 58%, comprising 10% of the turnout.

Strategic Factors in the States

Looking at the states just outlined, there are a set of assessments that can be drawn. Florida exemplified the Kerry campaign's weak economic platform and messaging, and illustrates his campaign's distance from field efforts (the minimum wage ballot campaign) that could have improved his performance. According to contacts close to the minimum wage ballot campaign, US Senate candidate Betty Castor stated she picked up votes and closed her race when she started campaigning on the minimum wage issue. Unfortunately it was a little late. In addition, the outcome in Florida highlights the operational challenges of bringing multiple field campaigns together, particularly when these campaigns have diverging legal status that regulates their message and their coordination.

The results from Ohio demonstrate again the critical importance of election administration, and, that election day is second in importance. While voter protection efforts were highly organized, these efforts overemphasized election day. Voter protection work needs to focus more on the general

conduct, actions and decisions of Secretary's of State, and city and county election offices. Although voter protection efforts addressed and documented many improprieties and illegal acts on election day, it was the actions of election commissions and secretary's of state prior to election day in Ohio, and other states, that had the greatest impact. These actions occurred prior to the election and included "purging" of voter lists (removing people from active voting status) by county boards of election, and the misallocation of voting machines and ballots.

In New Mexico, the presidential vote demonstrated that Latino people are indeed a swing constituency open to diverging political and partisan appeals.

Among the battleground states that Kerry won, Pennsylvania is a clear case of African Americans and low-income people delivering a state. They were central to Kerry's Pennsylvania win, and they will be central to the future of a Democratic majority. African American's are pivotal votes in critical battleground states and are the bulwark of Democratic politics in the South.

In Wisconsin, where Kerry just eked out a victory, a very significant factor was an integrated message and field program implemented in the late stages of the campaign, the critical period when wavering voters were making their decisions. This effort was targeted at two of the three most critical swing constituencies and attacked Bush where he was weak. *Campaign Money Watch*, a 527 affiliated with the organization *Public Campaign*, ran cable television and radio ads which appealed to "swing populist" working class people and the elderly. They ran a Cheney-Halliburton Kick-Back Ad and the Prescription Drug Rip-Off Ad which contained important messages that helped blunt the effectiveness of the Bush campaign's efforts to pull working class and elderly voters. The prescription drug ad was also picked up by SEIU, the service workers union, which paid for an additional run in Milwaukee. Importantly, field staff and volunteers from allied efforts

coordinated their voter contact efforts with the television and radio advertising, integrating field and message in a critical period of decision.

Winning in 2006, 2008 and Beyond

In the aftermath of 2004, a number of strategic and tactical steps are needed to advance progressive liberal politics and policies, win elections and implement critically important public policies.

Foundations and philanthropists should develop plans that integrate programs of political and social action into a coherent strategy to:

- 1) *message popular issues* and craft responsive public policy agendas that motivate voting,
- 2) mobilize new *voters* and build mass *constituencies* in support of progressive public policies and candidates for public office, and
- 3) recruit, train and support progressive *candidates* for state and federal office.

The three components of this strategic framework build on and augment each other, mutually reinforcing a movement for progressive social and political change. Specific tasks and programmatic measures could include the following:

Opposition field research.

- Opposition research is needed to identify the strategy, methods and the accomplishments of Republican field organization, how their tactics helped to deliver a majority for Bush, and how these tactics are likely to evolve and be used in 2006 and 2008. Such an analysis will be widely read and considered and contribute a unique resource to progressive, liberal and Democratic activists of all stripes.

An integrated field and message program.

- A coordinated national effort to test and build the components, and demonstrate the effectiveness, of an integrated field and message program that draws on local capacity and knowledge, volunteer activism, national coordination, resources and technical support. A field organization of staff and volunteers is a prerequisite for developing a viable political strategy.

Issue organizing and voter engagement.

- Coordinated national campaigns to engage voters and mobilize constituencies year round and build toward a progressive electoral majority with issues including Social Security, universal healthcare, Medicare and prescription drugs, minimum wage ballot campaigns, public education, and others.
- A coordinated initiative to run and win election of liberal and progressive Democrats to the House of Representatives, diversifying the congress.

Diversity to create a majority.

- An aggressive recruitment and leadership development effort to run people of color and women for elected office and to increase their role and visibility of at all levels activism and the Democratic Party.

Diversity is a central component of strategy just as it is a central requirement of organization. Attaining and sustaining a Democratic majority in national elections rests largely on the political leanings of American working class people. Growing in diversity, comprised of critically significant racial and national minorities, the support of working class voters can best be pulled into a political majority with leaders from diverse social and racial backgrounds.

Economics for a diverse majority.

- An economic program and messaging strategy to reach working and middle class people, recruit white working class people back to the Democratic party and help unify the diverse racial and national groups around a majority agenda;

Just as Democratic working class politics will need to be racially and culturally diverse, it will also need to be economically populist. As the composition of our society evolves to include more and more people from different ethnic and racial backgrounds, economic populism needs to serve as a unifying political agenda, bridging the diversity among working class people, and particularly among the Latino community, which is comprised of numerous nationalities. Economic populism is also the key to bringing white working class people more solidly into a Democratic electoral majority, blunting Republicans' efforts to pull these votes with wedge issues especially racist appeals.

Progressive leadership in the Latino community.

- Support for progressive Latino leaders at the state and local level to build their capacity to articulate a culturally meaningful progressive message, and mobilize and lead their communities.

Majority frames and coordinated messaging.

- Research and development of progressive framing strategies and political messaging to define liberal and progressive values and ideas, communicate these to the broader public, and counter Republican communications and framing
- Construction of a pipeline to disseminate the framing strategies and messaging content among leaders, field staff and activists and coordinate their use.

Good democracy.

- Year round monitoring of states' administration of voter registration and elections and organizing to strengthen the basic institutions and practices of democracy, improve representation, and prevent manipulation of voters and voting.

Voter protection efforts addressed and documented many improprieties and illegal acts on election day, however it was the actions of election commissions and secretary's of state prior to election day that had the greatest impact. Voter protection needs to focus more on the period before election day including voter registration and voter list purging, staffing and capacity at polling stations, and provisional balloting.

The Good Stuff from 2004 (and More of It!)

A number of organizations and efforts active in the 2004 election cycle were and are actively pursuing many of the steps outlined above. The list below represents a handful of organizations doing some very good work, work that needs to be evaluated and developed through the 2006 and 2008 election cycle.

New Field Capacity and New Voters.

- America Coming Together, Voices for Working Families, America Votes, National Voice, Campaign for Communities, the Community Voting Project, and Women's Voices Women's Vote each pulled together the major voter registration and turnout organizations in their respective spheres. There was greater coordination and collaboration than in any prior election, which resulted in dramatic increases in Democratic registration and voter turnout.
- The roles and programs of these assorted organizations needs to be assessed. Each had their strengths and weaknesses.

- While ACT injected partisanship, they used parachutes and omitted message. ACT hired staff from outside a state or region “parachuting” personnel in to these states. The human capital built up over the course of two years was let go. The field staff was laid-off shortly after November 2. ACT also eschewed message, leaving that to Kerry and other allies.
- In contrast, the 501C3s were permanent organizations, locally rooted and staffed, and led by community people. But, they were not partisan. 501C3’s cannot endorse or advocate voting for a candidate for public office, and so voter contacts did not include any message of support for any candidates, which confused people. Messaging in the C3 arena was issue-based but nonpartisan, and, like the 527s, lacked a unifying common frame.

Elections and organizing for state capacity.

- Progressive Majority builds the farm team.

Progressive Majority launched ProPAC in 2003, to recruit, train and support progressives running for state and local office. The effort targets battleground states and operational in the 2004 cycle in Pennsylvania, Washington, and Wisconsin. Arizona and Colorado were recently begun.
- ACORN and minimum wage ballot campaigns.

The state ballot campaigns for increases in the minimum wage offer real opportunities for Democratic candidates and politics. These measures provide low and moderate-income people with a tangible incentive for voting, generally have majority appeal and, if campaigned on, offer clear contrast between Democrats and Republicans.

Diversity and an electoral majority.

- Progressive Majority recruits people of color to run for office.

The Racial Justice Campaign Fund is an organizing drive to identify, recruit and support people of color and immigrant communities to run for elected office at the local, state and federal level that began in 2003.
- Latinos begin to get the attention they deserve.

Dedicated efforts to contact and communicate with Latino people gained momentum in the last cycle. Newer initiatives include Moving America Forward's 527 voter registration and turnout work, and the messaging work of the Hispanic Project of the New Democrat Network. Likewise, nonpartisan efforts by the Southwest Voter Education and Registration Project, Project VOTE, and the US Action network and others brought Latinos to the polls.
- African Americans surged to the polls.

The gap in voter turnout between African Americans and white voters all but disappeared. Three million more black voters turned out in 2004 than in 2000, representing 20% of the total increase in turnout. These voters are the core of the liberal and Democratic base and, if organized, could play a very important role in state and congressional elections in 2006.
- Single women defined as a constituency.

The effort to pull single women to the polls met astounding success. Newly targeted by Women's Voices Women's Vote, single women supported Kerry with 62% of their votes, and jumped from 19% of the turnout in 2000 to 22.4% in 2004. As a voting block, single women totaled greater than the combined total of African American, Latino and Jewish voters combined.

Messaging to pull votes.

- The rudimentary components of a messaging machine emerged, largely through the efforts of the Campaign for America's Future, Progressive Majority, the Center for American Progress, US Action, New Democrat Network and MoveOn.
- Campaign for America's Future is leading a messaging development process to better communicate a progressive economic agenda to working people, and will disseminate the messaging framework and tools and coordinate messaging strategy convenings.

Money organized in new ways.

- The Democratic Small Donor took the political realm by storm emerging almost overnight. What took Richard Viguerie a decade or more took Howard Dean, MoveOn and the internet one election cycle.
- Big donors also took new steps, largely in response to the implementation of the McCain-Feingold regulations. Major contributors supported innovation and moved toward greater coordination and collaboration.

The internet proves an essential tool of political organizing.

- MoveOn and Howard Dean brought Democratic campaigning and political organizing to a new level with the use of the internet, supporting decentralized grassroots organization, and providing an avenue for small donors to make a big difference.
- Blogs delivered important information to the grassroots and provided an arena for free dialogue among political activists and professionals.

In sum, despite significant Democratic losses, many good things happened in the 2004 election cycle, which, if nurtured to grow and encouraged to innovate, could become the bases of renewal and resurgence for progressive politics and leadership.

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