

## Mobilizing Party Participation: Defending the Iowa Caucuses

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### INTRODUCTION

The 2020 Iowa Democratic Party caucuses were a chaotic debacle because the voting results were not reported as is customary on the day of the caucuses. One of the most important roles of Iowa in the presidential nomination process is selecting candidates before the New Hampshire primary. In that sense, Iowa's impact in 2020 was limited. Before 2020, the Iowa caucuses had already been criticized not only by political scientists but also by party elites in Washington, DC. What caused the failure of the 2020 Iowa caucuses? Is there sufficient reason to terminate them? Is the problem caused by Iowa being the first state in the nation's sequential nomination process? Is it because of the unique voting system of the Iowa caucuses? Is it caused by administrative deficiencies?

The objective of primary elections and campaigns is more than simply getting the votes for selecting potential winners. If there are relatively unknown ways that could enhance robust party participation in the primary process, the caucuses should be reevaluated in terms of how they embrace activists and provide advocacy opportunities for fringe candidates. In this article I examine the pros and cons of the qualitative value of the Iowa caucuses as well as suggesting ways to repair administrative deficiencies.

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To defend the importance of having the Iowa caucuses in the US primary election process, I will present three exploratory examinations. First, I will provide a detailed assessment of where the 2020 Democratic Iowa caucuses went wrong by adding third-party reviews to the qualitative research of my participatory observations. Second, to differentiate the various administrative dysfunctions, including the reporting app issue from fundamental questions of Iowa caucuses, I will discuss the 2020 case in relation to existing literature on Iowa caucuses. Third, by interpreting the Iowa caucuses in the context of party decline and resurgence, I will examine recent examples of how the nomination process of the existing caucus format might contribute to nonelite participation and diversification of voices in the US two-party system. Finally, I will probe directions for potential reforms. In conclusion, I will discuss how campaigning in the caucus state in a sequential nomination process has provided opportunities for enhancing the mobility and dynamism of parties. Without a campaign arena such as Iowa, the diversity of actors and voices in the two parties might be limited.

### I. THE 2020 IOWA DEMOCRATIC CAUCUSES: THE DEBACLE

In the 2020 Iowa caucuses held on February 3, the winner was Pete Buttigieg with 26.2% of the votes (14 delegates), which almost tied him with Bernie Sanders with 26.1% (12 delegates).<sup>1</sup> Unlike other Iowa caucuses, which are held every four years, the impact in 2020 on selecting candidates was diminished because the results did not come out on the day of the caucuses. Because the last-minute local poll that was expected to be conducted by the *Des Moines Register* was accidentally cancelled,<sup>2</sup> the candidates were able to downplay the gap between their actual popularity in Iowa and media expectations, and this led to the New Hampshire primary ignoring the results of Iowa's decision.<sup>3</sup> The vast majority of media outlets in the United States criticized the Iowa Democratic Party (IDP), and a dysfunction of the mobile smartphone app was widely reported.

The law firms Bonnie Campbell and Faegre Drinker Biddle and Reath LLP issued their "Internal Review Report for the Iowa Democratic Party: 2020 Iowa Caucuses" on November 10, 2020.<sup>4</sup> The report confirmed that the smartphone app was the main reason for the delay in reporting the election results due to app development delays and lack of training. The report revealed that the delay in development happened because of the Democratic National Committee's (DNC) aggressive interjection into all

of the IDP's technology endeavors related to the 2020 Iowa caucuses. As the report points out, the IDP was not able to contract with a vendor to develop the app until August 2019 because they were waiting for approval from the DNC to hold virtual caucuses.<sup>5</sup> Virtual caucuses were intended to overcome the logistical inconvenience of being physically present, as they would provide an opportunity to vote via telephone, online, or other secure methods (Redlawsk 2019).<sup>6</sup> The final rejection of the virtual caucus by the DNC may be understandable considering cybersecurity concerns after the alleged Russian hacking during the 2016 presidential election,<sup>7</sup> which created a delay in the app development. The tension between the DNC and the IDP, namely the DNC's uncooperative relationship with the first-in-the-nation state, played a negative role in preparations that were inefficient and misguided.

Although the "Internal Review Report" states that "there were multiple reasons why the reporting of the results was delayed,"<sup>8</sup> the analysis basically refers to only the app-related matters and the DNC's intervention. Through extensive interviews with precinct captains, party insiders, and caucus goers, during my twelve years of participatory observation in Iowa of Republican and Democratic caucuses in 2008, 2012, 2016, and 2020, it is my understanding that the 2020 Democratic debacle happened not only because of the app but because of additional complicating reasons. Therefore, in this article I will fill the missing gaps in the "Internal Review Report" and the major arguments reported in the mainstream US media.

First, there is the complicated procedure of vote counting during the caucuses. The Democrats use a realignment process in which voters favoring a candidate must reach a designated viability line, which is usually 15 percent. Those voters whose candidate does not meet the test make a second choice from among the candidates who have passed the viability line. Following this procedure, caucus goers tend to use their first voting option for their favorite candidate, regardless of the candidate's viability or potential electability in the general election. In addition, strategic voting in the second round gives caucus goers another chance for expressing their priorities. In a situation in which hypothetical candidates A, B, and C all become viable in the first round, and D becomes nonviable, a supporter of candidate D has several options after the first vote, after watching the progress of other three competing candidates. If a voter dislikes the leading candidate A because of a particular issue, and B is neck and neck with A at the first round, the voter may choose B, even though the voter's actual second choice is C. To stop or help a candidate, a caucus goer can vote

strategically in the second round because of knowing who is leading and by what margin. Caucus goers who first choose a candidate who wins over 15 percent of the votes cannot change their choice, but they can persuade undecided voters to join them in the next round. If such persuasions and negotiations work, the priorities of strategic voting may change. Activists may even plan alliances between different campaigns in advance to prevent a particular candidate from getting chosen. As such, the final results absorb a wide variety of voter preferences on issues and candidates, and the complications of this process are a problem.

Second, the rule is not fully understood and is even often unknown among new caucus goers. College students take part in the primary process in their school states, not in their home states. This means not all first-time participants have had the experience of engaging in caucuses with their parents in Iowa. Many campaign staffers who have the responsibility of teaching the rules actually come from other states. Some campaigns organize their own training seminars, as did Ron Paul's campaign in 2012, in which it taught activists how to gain delegate seats in after-caucus discussions.<sup>9</sup> The 2008 Obama campaign staffers also knew the rules well and focused more on voter education.<sup>10</sup> Historically, all campaigns that had a strong knowledge base of the rules and took advantage of them ended up boosting their candidates to victory. As Barbara Trish and William J. Menner say, "understanding the rules of the game is key" (Trish and Menner 2021). If knowing the rules proficiently is part of the game in Iowa, campaigns and activists may hesitate to disseminate the rules widely beyond their potential base and may even have incentives to downplay the rules to mislead competitors. In a sense, the results represent their campaign efforts. But in fairness, local parties may have the most responsibility for sufficiently informing participants about the rules. In 2020, Andrew Yang, an underdog candidate in Iowa, suffered from this problem because his campaign staffers had limited knowledge about the caucuses and the rules.

Third, there has been longstanding local and national intraparty tension and debates between the IDP and the DNC about the role of Iowa, especially in 2016 and 2020. Trish and Menner (2021) note that a push for reform becomes strongest when a candidate or party has undergone a loss. Since the Sanders campaign challenge of requesting a recount of the results in 2016, the DNC put strong pressure on the IDP to change the rules by making them clearer and more transparent, thus making them fair to all. One of the IDP's reforms was to try to institute virtual caucuses, which was turned down by DNC five months before the caucuses. Another was the

**IOWA** DEMOCRATIC PARTY | **Presidential Preference Card**

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Voting Address \_\_\_\_\_ City \_\_\_\_\_ Iowa State ZIP \_\_\_\_\_

**1** **First Preference:** Please print the first & last name of the candidate you support during the first expression of preference.

**Signature:** Presidential preference card is not valid unless signed.

X \_\_\_\_\_

**Fig. 1.** Front page of presidential preference card used in the Iowa caucuses in 2020 (Iowa Democratic Party). “Module 8: Presidential Preference Cards,” <https://iowademocrats.org/2020-caucus-training-module-8/>.

**2** **Second Preference:** Please print the first & last name of the candidate you support during the second/final expression of preference.

**Signature:** Presidential preference card is not valid unless signed.

X \_\_\_\_\_

**OR** check below if you choose not to align with a viable candidate during realignment if your first choice was not viable.

**I choose not to align with a viable candidate.**

union bug here

**ONLY USE IN F(6)C SITUATION**  
Candidate first and last name: \_\_\_\_\_

Your Initials: \_\_\_\_\_

**ADAIR | 1NW ADAIR | 0001**

**Fig 2.** Back page of presidential preference card used in the Iowa caucuses in 2020 (Iowa Democratic Party).

introduction of preference cards (Figs. 1 and 2). As a backup for possible recounts, all participants receive a small card on which to mark their choice. But because of the complicated design of the cards and the lack of sufficient explanations by captains at caucus sites, these cards were misused and even made the final counting more difficult than before.

The intent of the card was for everyone to fill in their first choice on the first side, and only those who supported nonviable first choices were supposed to fill out the back side of the card. But when participants received the card and were about to vote, they started filling them out with a “first preference” and a “second preference.” Although the card indicates,

“(P)rint the first and last name of the candidate you support during the second/final expression of preference,” this instruction was too ambiguous about making a second/final preference choice. A precinct captain said, “The minute you hand out a card that’s got a 1 on one side and a 2 on the other, people assume that this is my first choice, and this is my second choice.”<sup>11</sup>

Finally, the app problem manifested itself due to the lack of training and preparation as shown in the “Internal Review Report.” The app was designed so that precinct chairs could automatically calculate the awarded delegates and submit their precincts’ caucus results to the IDP. In 2016, the caucus app, developed by Microsoft, was a trial version, and the IDP conducted at least two statewide comprehensive dry runs. The first one failed, and they fixed it. Because Microsoft declined to develop the app for 2020, the IDP had to find a different vendor. The Nevada Democratic Party, as another caucus state, recommended a political tech company called Shadow. However, in 2020, the precinct captains did not obtain the Shadow app until just two weeks before the caucuses. The captains received emails after January 18 with “a convoluted installation and login process set out in a 34-page ‘user manual.’”<sup>12</sup> According to my interviews with precinct captains, the installation and login processes were too confusing. As the report stated, if the user was on an Apple device, they were required to use Apple’s app store to install TestFlight, an app that allows users to download and install beta versions of apps for testing purposes, while Android device users had to manually install the application using TestFairy, a similar testing platform. Android installation required the user “to disable the default security settings on their Android device because, by default, Android devices do not allow installation of apps from ‘unknown sources,’ i.e., Shadow.” And, to add insult to injury, for security purposes, users were required to set up two-factor authentication (2FA) and verify their login and password with a six-digit 2FA code before entering a precinct ID.<sup>13</sup>

One captain said after the caucuses:

I had a lot of people who were having trouble downloading it. The initial email they got to download it looked like spam. It had something about “You need to change our [your] password,” and it looked like Vladimir Putin had sent it or something like that. So, people were scared of it. And after about last Thursday or so, I was just telling people, “Just phone it in.” Well, they should have anticipated that, and then what happened was the phone lines got overwhelmed.

Many captains gave up on the app and tried to use the hotline but could not get through. This captain continued:

Somebody had gotten through on the phone to the hotline, and they were not letting go of that phone line. What they did was they would give a result from a precinct, hand the phone off to the next precinct, and the next person would give the next results. And then, eventually, it became we got our turn. We reported our results, and then we handed it off to the next person, since we had that line and we were not going to give it up.<sup>14</sup>

## II. THE 2020 IOWA DEMOCRATIC CAUCUSES: OBSERVATION

I observed the caucuses of the precinct called “Iowa City 5” of Johnson County at the Iowa Memorial Union. Iowa City is a liberal college town where the University of Iowa is located. Iowa City 5 consists of a nearly all-student caucus. Since the chair was a student at the university, an experienced party activist, John Deeth, supported the chair as voluntary cochair. On the first alignment, Bernie Sanders and Elizabeth Warren were viable. Pete Buttigieg was five people short of viability, and Andrew Yang was about seventeen people short of viability. Buttigieg’s supporters understood the rules. The cochair said of them:

They knew they needed to keep their people there and recruit five more people. Yang’s people started collecting their cards and sending people home. They thought, “Okay. We can collect our cards and send people home.” I’m looking at the back of those cards. Those people had already written down a second choice, but they didn’t turn that card in to their new preference group. Then we couldn’t count those people anymore, and they were angry.<sup>15</sup>

It was because of the second problem as indicated above. Deeth added:

The Yang group didn’t understand the realignment system. It’s hard to tell how well people understand because everybody in the room we were in last time was brand-new. Only a tiny handful of people in that room had ever even caucused before, and so—but the cards were very, very, very confusing. It was like one more thing to ask the chairs to do, and nobody really—people weren’t getting it.<sup>16</sup>

As soon as the caucus staff knew they were going to be reporting the first-round results, a lot of people in the nonviable groups, Joe Biden and Amy Klobuchar supporters in particular, simply checked “I choose not to realign” and left saying “Joe Biden is not viable? I don’t care about a second choice. My vote for Joe got counted.”

At the Iowa City 5 site, eighty-five people left between the first and second vote, and that made the math complicated. The captain and volunteers tried to figure out which person rounded up to the next delegate. Deeth recollects:

We had nine delegates, when we had only allocated eight, and it was hard to figure out who got that extra delegate. It turned out to be Pete. We had to actually look at the printed rulebook. I had an out-of-state Sanders volunteer, who was absolutely convinced that Sanders was going to get the next extra delegate. I had it wrong, but we figured it out.<sup>17</sup>

The participants totaled 765, and 754 voted on the first alignment. On the final vote, they only had 670, which means everybody who filled out a first ballot preference card got their first preference reported, but 84 people did not realign. The viability number to reach in the precinct was 115 votes; that was 15 percent of the original check-in. Even when the people left, it remained at 115. The preference card was too confusing for participants to fill out. As explained, participants were supposed to make a second choice *after* the first alignment was done. At Iowa City 5, this is why anybody who was in the (viable) Warren group should not have put down a second choice at all. Deeth said:

What they wanted us to do was destroy out all those cards and issue new ones. There was no way we could do that. It was too overwhelming. We also had trouble handing them out in sequence because, I mean, we had 765 people. The intent was to hand them out in sequence, one at a time. I know that some of our volunteers, they flipped their stack over. They started from the back instead of the front. So, we had gaps, which is something that the IDP is not going to be happy about. By the time we figured out—“Oh, you’re handing it from the bottom of the pile instead of the top”—[it was] too late.<sup>18</sup>

The guilty verdict on the app was assessed by the US media after caucus



day in 2020 and in the intraparty investigation report, but the preference card issue about requiring complete comprehension of the realignment rule was not mentioned as much as the app problem.

### III. THE CRITICAL LITERATURE ON THE IOWA CAUCUSES

As seen here and in other scholarly published arguments, the 2020 Iowa Democratic caucus was riddled with administrative problems. Rachael V. Cobb states, “The debacle of the 2000 election exposed significant flaws in our system of election administration, from technological issues around the design of Florida’s ‘punch card’ voting machines to observing the impact of partisan election officials manipulating rules to achieve partisan advantage” (Cobb 2020). This assessment should not be overlooked when considering the necessity of using online technologies in elections in the post COVID-19 pandemic era and the opportunity for abuse in polarized politics.

There is a long history of significant scholarly literature on the Iowa caucuses. The most fundamental criticism of them is that Iowa’s demography and ideology are unrepresentative of the country or even of the two parties. Iowa is racially homogeneous, with an almost 90% white population (2019 Census). African Americans make up less than 5%. As well, it is an aging state. The over-sixty-five-year-old population is 17.1% as of 2018, which is seventeenth among all fifty states. It is a smaller state as well, ranking 33 out of 50 in total population numbers. The economy is dependent on agricultural products such pork, corn, and soybeans (Abramowitz and Stone 1984; Winebrenner 1998; Hull 2008; US Census 2019).<sup>19</sup>

Critics of the Iowa primary also say there are fundamental problems with functionality, which can result in biased results. The Iowa caucuses were conducted at 7 p.m. for about two hours. Night-shift workers cannot vote in them, and handicapped people with serious disabilities as well as senior citizens who are not mobile on their own are also left out. Iowans who happen to be overseas because of military service are not able to join the voting either. In addition, participants must publicly state their political preferences that represent their ideology. One has to reveal party affiliation automatically because of the way the caucuses are conducted. On the Republican side, there is a secret vote, even though supporters of some candidates make speeches to try to influence others before voting. On the Democratic side, one has to reveal candidate preferences in front of one’s

neighbors. It is not a private vote but an open meeting as people meet and discuss the vote. Considering the possibility that bosses and colleagues might live in the same precinct or the pastor of one's church could be present, there are intricate social pressures that can prevent a person from voting for who they really want.

Tendencies to sway a vote or stop a vote altogether have been a problem in Iowa caucuses over the years. The average voter was an older person. In 2004, 65% of participants were over fifty. Even in 2008, the year of Obama's victory by the enthusiastic youth supporters, 60% of Democratic participants were over forty-five.<sup>20</sup> Socioeconomically, people with higher education and higher income tend to participate. "Midwest bias" is also prevalent, as characterized in the established presence of Tom Harkin and Dick Gephardt. Ideologically, marginal candidates can be influential in both parties such as Pat Robertson, Pat Buchanan, Mike Huckabee, Rick Santorum on the Republican side and Jessie Jackson and Howard Dean on the Democratic side (Mayer 1996; Wang 2007).

#### IV. STUDIES ON PARTY RESURGENCE

Despite of all those operational problems, however, if larger participation in campaigns for Iowa caucuses are reevaluated in the context of party resurgence and dynamism, the value of caucuses in a smaller state like Iowa cannot be ignored.

The loss of control over the nomination was characterized as "party decline" in past literature. As Daniel Shea and Michael John Burton have written, campaigns were party centered from the 1830s to the 1960s (Shea and Burton 2001). Suburbanization following the economic development of urban immigrants resulted in demographic changes to the base of party-centered campaigns. In addition to the loss of party control over the nominating process, another result of party decline up until the 1980s was a significant decrease in party identification as seen in split-ticket voting (Wattenberg 1991). Such party decline, however, only means a decline in the "party in the electorate" (voters), which is merely one of the three-part political-party model formulated by V. O. Key, with the others being the "party in office" (candidates and office holders) and the "party organization" (party leaders and organizations) (Key 1952; Sorauf 1967). As Leon D. Epstein has stated, as long as the two-party competition and voter registration system are regulated by individual states, a decline in the "party in the electorate" is not enough to result in whole-party decline

(Epstein 1986).

Arguments against party decline after the 1980s were made mainly from the perspective of the resurgence of “party organization.” Paul S. Herrnson pointed out that the national party organizations started functioning as “intermediaries” of PACs (political action committees) and political consultants in service to candidates (Herrnson 1988).<sup>21</sup> Further evidence of party renewal is seen in local party organizations, such as state committees and county committees that have maintained a certain influence in the election process (Cotter et al. 1989). In response to the understanding that party reforms of the 1970s have made the political parties weaker because of the lessened influence of the party establishment over the candidate nomination process (Polsby 1983; Kirkpatrick and Miller 1976), Denise Baer and David Bositis saw the outcome of party reform in a more positive way. Their theory called “Party Elite Theory of Democracy” argues that nonelite participants, such as minorities and progressive activists, are indispensable “new elites” in the parties and could lead to party resurgence through integrating social movements into party politics (Baer and Bositis 1988).

Critical analyses of party decline have led to redefining the US party structure through modifying Key’s three-part party theory. John Aldrich explains that weaker “party in the electorate” and stronger “party organization” is not a contradictory phenomenon because the position of major political actors was taken by policy-motivated “amateurs” or “purists” in the wave of candidate-centered campaigns and decline of machine politics (Aldrich 1995). Following Aldrich’s theory, though, new definitions of parties in a broader concept are debated. Beyond the topics of candidates and public officeholders, Masket has enlarged the theory of parties to include political insiders such as interest groups, legislative leaders, and activists, which he terms the “informal party organization.” Old machine politics was based on economic interests, but in Masket’s model the new informal party organization is the gatekeeper of nominations and is driven by ideological motivations (Masket 2011). In addition, in terms of strategic allocation of campaign financial resources, Brian Brox has introduced the parties-as-partners framework whereby political parties develop closer relations with candidates beyond Herrnson’s “service provider” notion. Even after the Bipartisan Campaign Reform Act of 2002 banned “soft money,” the national organizations of the Democratic and Republican parties have transferred money to selected candidates, mainly for symbolic effect, which strengthened the unique influence of these

political parties (Brox 2013).

#### V. REEVALUATION OF THE IOWA CAUCUSES AND IMPLICATIONS FOR DEMOCRACY

As part of the party-resurgence arguments, the Iowa caucuses have played an important role because of their uniqueness in the party primaries.

First, the requirement of commitment to a candidate has to be higher in caucuses than simply casting a vote at a polling place because of the condition that people have to show their partisanship and preferences in public. It enhances the development of stronger organization by activists with high enthusiasm. In the 2008 Obama campaign, for example, the campaign organization developed Organizing for America and 501 (c)(4) Organization for Action, to provide a supportive network for the Obama administration. Although the network was created for Obama and not for the Democratic Party, it helped promote many Democratic agendas such as the Affordable Care Act (Melber 2010; Bykowicz and Lerer 2013; Zeleny 2013).<sup>22</sup>

The primary process itself is not about political party partisanship because it is basically internal fighting. As Aldrich has said, policy-motivated “amateurs” or “purists” have taken larger spaces in the parties, where old partisan supporters such as the labor union members showed virtually automatic partisan loyalty. Issues are becoming more important than party affiliation. Because the main interest of policy-motivated “amateurs” is not a party but a single issue, the core supporters of outsider candidates are not reliable party loyalists. Their passion on issues, however, could lead to mass mobilization to defeat candidates of the opposite party. To implement policies in action beyond just advocacy, gaining actual power in the party and changing the party ideologically have become mandatory tasks. In 2008, Obama campaigned, especially in Iowa, with a focus on opposing the Iraq war.<sup>23</sup> In 2012, on the Republican side, fiscally conservative issues such as opposition to TARP (Troubled Assets Relief Program) and the Affordable Care Act boosted Ron Paul among Tea Party activists in a socially conservative state such as Iowa.<sup>24</sup> Opposing the TPP (Trans Pacific Partnership) was crucial for Bernie Sanders and even for Donald Trump (for different reasons) in the primary.<sup>25</sup>

Second, the first-in-the-nation status of Iowa in the sequential nomination process matters as the state has been traditionally looked on as a place for advocacy. Candidates with small campaign organizations and less

money can disseminate their messages nationally, thanks to the massive media attention on early states, realignment on the Democratic side, and caucus day registration on the Republican side. Advocacy candidates with no chance for the nomination such as Ron Paul and Dennis Kucinich understand the importance of Iowa in a campaign and have used it wisely to convey their political messages. As previously discussed, in the case of 2020, the Democrats use a realignment process in which voters favor a candidate who fails to reach a viability line. Caucus goers join the campaign based on their single issues and use their first voting option for their favorite choice, regardless of viability or even electability in the general election. This could even help a weak candidate pass the 15 percent viability line. The first-in-the-nation status provides longer campaigns of advocacy such as the Iowa State Fair and straw poll (organized on the Republican side in the past) in the summer of the year before the presidential elections. Skipping early states, especially Iowa, as Rudy Giuliani did in 2008, could result in voters forgetting about the candidate until the next stop, which was Florida in his case. In the social media age, local campaigns in the primary process became virtual national campaigns, including side effects from negative campaigning.<sup>26</sup>

Third, the intense competition involved in mobilization and persuasion has energized “retail” politics, such as the in-person democracy strategy, aside from paid advertising. David Redlawsk says, “It is harder for candidates to reach caucus participants because there are fewer of them in the population. Retail politics is critical as opposed to mass media campaigns” (Redlawsk, Tolbert, and Donovan 2010). Some scholars argue that ground games have had no effect on changing voters’ minds as demonstrated by field experiments. But this refers only to “persuasion” in the general elections (Kalla and Broockman 2018). The effects on “mobilization,” especially in the primary, which Donald Green and Alan Gerber demonstrated in their experiment, is still worthy of consideration (Green and Geber 2004). The long campaigns in a small state provide opportunities for candidates to learn about the concerns of ordinary voters at smaller events. Timothy Hagle stressed that having candidates come to a small state with inexpensive media markets

allows candidates that are lesser-known or with fewer resources to make their case and possibly build a credible campaign. It also gives candidates an opportunity to meet with voters to find out what they are thinking, what issues are important to them, etcetera. As a

counterpoint, consider if California went first. A candidate would need huge amounts of money right from the start and would have to have a fully functioning campaign organization nearly immediately to be viable. That would eliminate a lot of potential candidates.<sup>27</sup>

The implications of Iowa being a factory for developing campaign strategy cannot be underestimated. The canvassing for caucuses was a test bed for community organizing in the 2008 Obama campaign, and the interviews were absorbed into big data that detailed voter patterns, which can prove to be useful in later cycles for the parties. As Trish and Menner argue, campaign staffers with extensive experience on the ground in Iowa are regarded as precious campaign assets (Trish and Menner 2021). Campaigns in caucus states do train young political talents. Although, historically, community organizers stayed away from partisan politics until the 2008 Obama campaign, Iowa field staffers have always operated like community organizers.<sup>28</sup> In larger states or in states with nonsequential nomination or only a noncaucus primary, the way of contacting and messaging would be more centered on advertising and would require large sums of money. This might work for winning, but it might not be of long-term benefit to the parties.

## VI. PARTY RENEWAL AND MOBILITY WITH NEW PARTY ELITES

Because of these major caucus happenings, especially after Obama, the mobility of parties has intensified throughout the campaigns in Iowa. An interesting phenomenon occurred after 2016 when third-party outsiders enlarged the political domain by digging up core supporters. In past presidential elections, third-party candidates, such as Ross Perot in 1992 and Ralph Nader in 2000, were simply spoilers and were never thought about in the caucuses and primaries. Both Trump and Sanders, however, became serious candidates in the Republican and Democratic parties in 2016 after strong showings in Iowa. A great number of passionate activists had been recruited during the primary process, especially in Iowa.

In 2016, the Republican Party absorbed white blue-collar workers who were formerly Democratic Party supporters because of their support for Trump's hybrid positions that did not seem to have the traditional small-government flavor.<sup>29</sup> Iowa, where Trump overcame Jeb Bush, was a base of the Tea Party, and Tea Party candidates such as Ted Cruz were very popular. In Iowa, Trump came to symbolize opposition to establishment-

type administrations like those of George H. W. and George Bush and Bill Clinton. After the primary he behaved like a party leader and sought help from the Republican National Committee and allied organizations in traditional Republican bases.<sup>30</sup> Social conservatives in Iowa chose to be his base strategically for *Roe v. Wade* and FFC (Faith and Freedom Coalition), a 501(c)4 Christian-based organization, joined Trump's machine in the 2016 general election, with GOTV (get-out-the-vote) operations on the ground, conducted by its 1.8 million members, and wielding a hefty \$20 million in funds. An interesting outcome of this organization is the bridge building between traditional social conservatives and Tea Party-style fiscal conservatives focusing on smaller government.<sup>31</sup> As Boris Heersink points out, Trump maintains control of the Republican National Committee by taking advantage of the nominating privilege of the chair (Heersink 2018).

On the Democratic side, Sanders had a clear vision to move the party left with his brand of democratic socialism. In a sense, winning the presidency was a secondary objective for Sanders who had a disguised principal goal of reforming the party with the help of energetic grassroots millennials. As Baer and Bositis state, social movements can create a "new party elite" as in the 1970s. In 2016, the Sanders movement gained coherent power in the primary process especially in Iowa, with a clear issue focus: defeating the proposed TPP (Trans-Pacific Partnership trade agreement).<sup>32</sup> By the time of the 2016 primaries, anti-TPP activists from various voting blocs were strongly united.<sup>33</sup> The first bloc was the labor movement. AFL-CIO director Damon Silvers states that "a successful progressive coalition of the twenty-first century" should be assembled for dealing with climate change, economic insecurity, a majority minority society, and a very rapid change in public attitudes around issues of gender and sexuality. Beyond traditional labor union concerns, namely jobs and pay, current union leaders are joining the progressive coalition to try to survive the seemingly unstoppable decline in union membership. On TPP, Silver says, "Our concern about the TPP is not that we are opposed to forming a trade agreement in the Pacific Rim. It's that the substance of what this agreement is contributes to corporate-dominated globalization and downward pressure on wages."<sup>34</sup>

The second bloc to enter this scenario was the environmental groups. They were concerned with the environmental chapter of TPP, which is supposed to be about how countries must be committed to combating things such as illegal forestry.<sup>35</sup> An official of the Responsible Trade Program of the Sierra Club told me they were very concerned about "the impacts of fracking and of unconventional resource extraction that more and more

studies are showing have huge emissions associated with them.”<sup>36</sup> One of the interesting dynamics the anti-TPP movement brought forward was the unusual collaboration between labor and environmentalists sharing a focus on opposing global corporatism. The official told me, “The Sierra Club, as well as some of our labor allies, for example, work on the Democracy Initiative, which really pushes to help limit the influence of corporations in the political processes.”<sup>37</sup>

The third key bloc of anti-TPP activism was consumer organizations such as Public Citizen. When it comes to TPP, their biggest concern was the investor-state dispute mechanism.<sup>38</sup> Since Public Citizen is a 501(c)4 nonprofit organization, it was not affiliated with any particular candidate during the campaign season. But it applied pressure as a lobbying organization. As Jessa Boehner of Global Trade Watch of Public Citizen states, “We definitely talk to them [the candidates], and when they say helpful things, we push it out and things like that. We have on one side Bernie Sanders, who is extremely liberal, and then we have Donald Trump, who is quite the opposite, and they have both come out very, very strong against the TPP. Hillary Clinton, because of all the opposition to the TPP, hasn’t totally come out against the TPP, but she’s had to kind of backtrack on her position.”<sup>39</sup>

In lobbying against the TPP, Public Citizen allied with the Sierra Club and the AFL-CIO, which resulted in a Twitter storm that attracted 8 million views in a short period of time. Without this progressive coalition against TPP being operative in early 2016, the Sanders movement was not able to develop a huge following, but it remained active in Iowa until his second run in 2020. Those “new party elites” of policy-motivated “amateurs” or “purists” engendered from social movements inspired Sanders support teams in Iowa and other early primary states.<sup>40</sup> For instance, Evan Burger, an environment organizer in Iowa, joined the Sanders campaign in Iowa as the deputy state director in 2016 and Iowa caucus director in 2020. Burger and his colleague in Iowa established an organization to support progressive campaigns.<sup>41</sup> Many of Obama’s campaign volunteers continue to be active in politics. Aletheia Henry, a caseworker for children’s services, joined Obama’s campaign in Iowa as a field organizer in 2008. After the election, she served as the Michigan director for Organizing for America and was the Northeastern states regional director at the DNC. Then, she became an adviser to Hillary Clinton’s campaign in 2016.<sup>42</sup>

If Sanders and Trump did not run as candidates in the two major parties, they could not appeal to voters wanting real party reforms. This



is why the Sanders campaign took advantages of the TPP as a decisive single issue during the primary and even requested to coauthor the party platform.<sup>43</sup> The Democratic platform of 2016 became “the most progressive platform ever” because of the party accepting key changes promised to the Sanders campaign.<sup>44</sup> Keith Ellison from the Sanders camp was elected as deputy chair of the DNC in 2017. In 2020, the Biden campaign embraced the Sanders campaign to win the general election. By maintaining an ongoing two presidential election cycles project, environmental activists successfully made climate change a top priority of the Democratic Party and the Biden administration, thanks to the formidable Sanders campaigns in Iowa and other early states in 2020.

The Sanders campaign illustrates the co-opting of the outsider by the party. In addition, some of the previous problems in Iowa, such as the demographics and age issue, have changed with more younger participants in 2020. Those caucus goers over forty-five still make up 55 percent of all voters, but among the Sanders voters, 81 percent were under forty-four.<sup>45</sup> And it mattered as a successful youth movement with the age gap in enthusiasm. When policy-motivated “amateurs” are not satisfied with advocacy outside the parties, they move toward active responsibilities within the parties, as was the case when “the new elites” joined the party in the 1970s. Thus, the role of the Iowa caucuses should be reevaluated in the party-resurgence literature.

## VII. IDEAL REFORM PATH

In order to maintain a fair and balanced perspective on the Iowa caucuses reform debate it is important to remember the tendency for that debate to be politicized. Various actors propose reforms that will benefit them. The national party organizations focus on winning in the general election and hesitate to give up control over state party organizations. State parties compete to have first-in-the-nation status, which has bipartisan interests in coordination between the Republican and Democratic parties. Other early states, such as New Hampshire, and larger states have good reasons to claim against Iowa’s first in the nation status, but they do not oppose the sequential primary. It is simply bipartisan competition between the early states over the first seat in the primary process.<sup>46</sup> Debates on the nomination calendar in national party organizations are influenced by presidents and party leaders. A successful outcome in Iowa can help shape the views of future candidates and spin-doctors to include Iowa on their campaign

trail and be viewed as beneficial. Even though they were not eventual winners like Obama, phenomena makers such as Paul, Sanders, and Trump (in 2016) have favorable views on Iowa. But not all presidents have had a favorable experience in Iowa, as evidenced by the Clintons. Bill Clinton skipped the Iowa primary in 1992 because candidate Tom Harkin was a local political titan in Iowa. Neither of the Clintons likes Iowa, and neither has ever been serious about organizing there.<sup>47</sup> Considering this trend and Biden's shallow relationship with Iowa, the IDP's prospects for 2024 may not be good. In 2020, the Biden campaign did not make a massive effort to organize in Iowa, unlike the Obama campaign in 2008.<sup>48</sup>

Aside from political noises from various actors, the chaotic debacle of the 2020 Democratic Iowa caucuses was indeed a problem of operation and administration that should be criticized and fixed. Accepting the recommendations regarding the apps in "Internal Review Report" is a necessity. The suggestions include:

The IDP should consider (1) setting hard internal deadlines for all technology and software projects to complete development with sufficient advance time to test, debug, and secure the software; (2) ensuring all users will receive training and assistance with securely installing the app on their devices; and (3) prioritizing buy-in and commitment to the use of the app in all circumstances barring the need for emergency backup reporting methods.<sup>49</sup>

On cybersecurity, the report stresses the importance of "the development of its own internal technology expertise and experience, which is necessary to manage technology projects and cybersecurity threats, and continuing to coordinate on cybersecurity measures and exercises with trusted third parties".<sup>50</sup>

This may require fixing the unpopular volunteers-based administration of the caucuses in both parties to some degree, although the grassroots voluntary operation has been one of the key traditions of the caucuses at local party events.

Some reforms may be possible through using online technologies. The virtual caucus, planned originally by the IDP for the 2020 caucuses, could be reconsidered if a higher level of security is developed. It is understandable that the DNC rejected the idea for security reasons, considering the risk of hacking. However, if it is discussed since the COVID-19 pandemic, when online communications are indispensable,

the DNC might come up with a different decision instead of dumping the virtual caucus plan.

The campaigning in caucuses in smaller states like Iowa requires in-depth examination of the candidates as Iowa voters take time to learn about them. This process takes a certain amount of commitment as coming to a precinct caucus takes more effort than just casting a ballot (Hull 2008; Redlawsk, Tolbert, and Donovan 2010; Hagle 2015). This demand of commitment for persuasion works in tandem even with the digital campaigns (Kreiss 2012.). This paper, however, does not deal with the debates on how effective door-knocking canvassing was for voter turnout compared to the phone bank and text bank, as well as the ground games vs. advertising. As Dylan Matthews points out, “Campaigns have turned to ‘relational voter turnout,’ where instead of phone banking or canvassing strangers, volunteers try to turn out people close to them, such as friends and family” (Matthews 2020). In recent cycles, even surrogate strategies have been changing from old-fashioned celebrity campaigns to more effective use of nano-influencers (Goodwin, Joseff, and Woolley 2020). Following this trend, the organization built by intimate relationships forged in caucus campaigns, sometimes over a year, would be the source of a useful database and allied network for the parties while inspiring the motivation of participants through voter-campaign experiences beyond advertising.

This is why reforms should not miss this point: the 2020 administrative failure does not negate the relatively unappreciated democratic value of the Iowa caucuses, especially in mobilizing more vibrant and robust party participation. Although the rules define campaigns and advantage particular candidates, denying the caucuses would mean denying the victories and movements of Obama, Sanders, Paul, and Trump, like it or not. The “Internal Review Report” recommends that the IDP consider “simplifying the caucus process” to make it similar to the caucuses held by the Republican Party of Iowa and in other states.<sup>51</sup> A better way of conducting the realignment needs to be seriously examined, especially to make the rules easier to understand. But in doing so, the core values of the caucuses should not be sacrificed.

In defending caucuses in a sequential primary process, the bad news for Iowa is that a first-in-the-nation state would not necessarily be Iowa. The problem of representation of average American voters remains. In more demographically diverse states, with more Asians, Latinos, and African Americans, outreach strategies conducted by a diverse group of activists, often in languages other than English, would be welcome, and this would

benefit all candidates.

Changing the first-in-the-nation state to a more diverse state might be fairer, but in terms of operation, it would be unrealistic. Maintaining the present caucus states as it is may be easier. In caucus states such as Iowa and Nevada, voters are familiar with how their caucuses operate, despite what may seem complicated for some first-time participants. Nonetheless, the debate over more balanced representation should be continued.

## CONCLUSION

In the United States, the primary process is an open system, functioning as “different parties” within the two parties by diversification of participants with different political positions that sustain mobility of the parties to some degree. The downside of the Iowa caucuses, such as giving a boost to candidates who some may view as extreme, is undeniable. However, there are positive reasons for having at least one caucus state having a wide variety of nomination methods within primaries. In sum, as suggested by the discussions in previous sections, denigrating caucuses in a small state and sequential primary voting could be a bad idea, although the significant question of whether the first-in-the-nation state should be Iowa remains. By holding caucuses in sequential nomination, even whether digital or in-person, US party politics may keep its mobility to some degree. Campaigns and elections are not just for deciding who gets the most votes, they serve a larger purpose of making sure the democratic process is inclusive. Focusing on short-term efficiency does not lead to a better democracy. The way in which new technologies are utilized depends on nomination rules and party administration. Maintaining mobility within parties should be encouraged, but this process will require time and effort to produce a positive outcome.

## NOTES

<sup>1</sup> “Iowa Democratic Caucus Results,” *Des Moines Register*, <https://www.desmoinesregister.com/elections/results/primaries/democratic/iowa/>, accessed September 1, 2020; “2020 Iowa Democratic Caucuses Live Results,” *Washington Post*, <https://www.washingtonpost.com/elections/election-results/iowa/>, accessed September 1, 2020.

<sup>2</sup> Here is the explanation from the editor of *Des Moines Register*: “It appears a candidate’s name was omitted in at least one interview in which the respondent was asked to name their preferred candidate. While this appears to be isolated to one surveyor, that could not be confirmed with certainty. Therefore, out of an abundance of caution, the partners made the difficult decision not to move forward with releasing the poll.” <https://www.desmoinesregister.com/story/news/2020/02/01/des-moines-register-cnn-cancels-release->

iowa-poll-over-respondent-concerns/4637168002/, accessed January 25, 2022.

<sup>3</sup> From the editor: *Des Moines Register*, “Partners Cancel Release of Iowa Poll after Respondent Raises Concerns,” *Des Moines Register*, February 1, 2020, <https://www.desmoinesregister.com/story/news/2020/02/01/des-moines-register-cnn-cancels-release-iowa-poll-over-respondent-concerns/4637168002/>, accessed September 1, 2020.

<sup>4</sup> “Internal Review Report for the Iowa Democratic Party: 2020 Iowa Caucuses,” Campbell law firm and Faegre Drinker, Biddle, and Reath LLP, November 10, 2020. The lead authors are Bonnie Campbell (former Iowa Attorney General) and Nick Klinefeldt (former US Attorney). <https://iowademocrats.org/wp-content/uploads/2020/12/2020-11-10-Internal-Review-Report-for-the-Iowa-Democratic-Party-2020-Iowa-Caucuses.pdf>, accessed September 1, 2020.

<sup>5</sup> *Ibid.*, 21.

<sup>6</sup> Personal interview, Dave Redlawsk, October 28, 2019, Iowa City, IA.

<sup>7</sup> Brianne Pfannenstiel, “Iowa Democrats propose ‘satellite’ caucus system to replace virtual caucuses in 2020,” *Des Moines Register*, September 19, 2019, <https://www.desmoinesregister.com/story/news/elections/presidential/caucus/2019/09/19/election-2020-iowa-democrats-satellite-caucus-replace-virtual-plan/2380096001/>, accessed September 1, 2020.

<sup>8</sup> “Internal Review Report for the Iowa Democratic Party,” 24.

<sup>9</sup> Personal interview, Randi Shannon, Travis Heflin, and Matt Heflin, January 2, 2012, Iowa City, IA.

<sup>10</sup> Personal interviews, Terry Walsh, June 2, 2009, and February 19, 2013, Evanston IL; Larry Grisolano, February 4, 2016, Chicago, IL; Peter Giangreco, February 19, 2013, Evanston IL and February 4, 2016, Chicago, IL.

<sup>11</sup> Personal interview, a Democratic Party activist, February 4, 2020, Iowa City, IA.

<sup>12</sup> “Internal Review Report for the Iowa Democratic Party,” 7.

<sup>13</sup> *Ibid.*

<sup>14</sup> Personal interview, a Democratic Party activist, February 4, 2020, Iowa City, IA.

<sup>15</sup> Personal interview, John Deeth, February 4, 2020, Iowa City, IA.

<sup>16</sup> *Ibid.*

<sup>17</sup> *Ibid.*

<sup>18</sup> *Ibid.*

<sup>19</sup> <https://www.census.gov/quickfacts/IA>, accessed September 1, 2021.

<sup>20</sup> ABC News, “Iowa Dem Caucus Exit Poll” <https://abcnews.go.com/images/PollingUnit/IADemHorizontal.pdf> accessed January 30, 2021.

<sup>21</sup> The national party organizations include the following six institutions: DNC (Democratic National Committee), DSCC (Democratic Senatorial Campaign Committee), DCCC (Democratic Congressional Campaign Committee), RNC (Republican National Committee), NRSC (National Republican Senatorial Committee), NRCC (National Republican Congressional Committee).

<sup>22</sup> Public comment, Jeremy Bird, “High-Tech and Highly Targeted: Inside the Obama Campaign’s Digital War Room.” University of Chicago, Institute of Politics, February 23, 2013, Chicago, IL.

<sup>23</sup> Personal interviews, Bettylu K. Saltzman, May 12, 2009, Chicago, IL; Janice D. Schakowsky, April 2, 2009, Washington, DC.

<sup>24</sup> Personal interviews, Rand Paul, April 2, 2011, Iowa City, IA and August 13, 2011, Ames, IA; Kim Pearson, August 13, 2011, Ames, IA; Tim Pawlenty, August 5, 2011, Iowa City, IA; Sandra McLaughlin, January 3, 2012, Iowa City, IA.

<sup>25</sup> Personal interviews, Bria Dunham, February 6, 2016, Manchester, NH; Myra Hackett, February 6, 2016, Manchester, NH; Mike Lux, March 11, 2016, Washington, DC.

<sup>26</sup> Personal interview, Simon Rosenberg, November 15, 2016, Washington, DC.

<sup>27</sup> Conversation via email, Timothy Hagle, August 28, 2021.

<sup>28</sup> Personal interviews, David T. Kindler, May 12, 2009, Chicago, IL; Mike Kruglik, June 18, 2009, Chicago, IL; Abner Mikva, May 13, 2009, Chicago, IL; Gerald Kellman, May 22, 2009, Philadelphia, PA; Peter Giangreco, February 19, 2013, Evanston IL and February 4, 2016, Chicago, IL.

<sup>29</sup> Personal interviews, Ben Kriz, November 18, 2016, Iowa City, IA; Jim Glasgow, November 18, 2016, Iowa City, IA.

<sup>30</sup> Personal interview, John Gizzi, November 16, 2016, Washington, DC.

<sup>31</sup> See the website of the Faith and Freedom Coalition at <https://www.ffc Coalition.com/>, accessed March 1, 2019.

<sup>32</sup> See “Broken Promises: Decades of Failure to Enforce Labor Standards in Free Trade Agreements” (Prepared by the Staff of Sen. Elizabeth Warren) and David Dayen, “Elizabeth Warren Sees Broken Promises in Obama’s Trade Agenda,” *New Republic*, May 18, 2015.

<sup>33</sup> Personal interview, John Deeth, November 19, 2016, Iowa City, IA.

<sup>34</sup> See AFL-CIO, “The US-China Economic Relationship: TPP Is Not the Answer” March 16, 2016; personal interview, Damon Silvers, September 29, 2015, Washington, DC.

<sup>35</sup> See “Raw Deal: How the Trans-Pacific Partnership Could Threaten Our Climate,” Sierra Club, December 2013.

<sup>36</sup> Personal interview with an official of Responsible Trade Program, September 30, 2015, Washington, DC.

<sup>37</sup> *Ibid.*

<sup>38</sup> See Memo: “Administration Desperate for Trans-Pacific Partnership Deal: There May Be an Announcement, But a Real Deal? One That Could Pass in an Election Year?” *Public Citizen*, September 25, 2015.

<sup>39</sup> Personal interview, Jessa Boehner, October 3, 2015, Washington, DC.

<sup>40</sup> Personal interviews, Bria Dunham, February 6, 2016, Manchester, NH; Myra Hackett, February 6, 2016, Manchester, NH.

<sup>41</sup> See the website of Hegemony Strategies, <https://hegemonystrategies.com/>, accessed November 1, 2021. “Des Moines Register’s 50 Most Wanted Democrats,” <https://features.desmoinesregister.com/news/politics/50-most-wanted/evan-burger-election-2020-iowa-caucus-democrats-key-people-to-know.html>, accessed November 1, 2021.

<sup>42</sup> Scott Horsley, “Obama’s Legacy: His Army of Campaign Volunteers Continues to Serve,” NPR, January 5, 2017, <https://www.npr.org/2017/01/05/507927467/obamas-legacy-his-army-of-campaign-volunteers-continues-to-serve>, accessed November 1, 2021.

<sup>43</sup> The chair of the DNC nominated four other members.

<sup>44</sup> Personal interviews, Robert Creamer, August 15 and November 15, 2016, Washington, DC.

<sup>45</sup> CNN Exit Poll. <https://edition.cnn.com/election/2020/primaries-caucuses/entrance-and-exit-polls/iowa/democratic>, accessed September 1, 2021.

<sup>46</sup> Personal interviews, Bill Keettel, April 1, 2011, Coralville, IA; David Redlawsk, October 18, 2007, and September 24, 2010, Iowa City, IA; Brian Flaherty, January 3, 2008, Iowa City, IA.

<sup>47</sup> Personal interview Peter Giangreco, February 19, 2013, Evanston IL and February 4, 2016, Chicago, IL.

<sup>48</sup> Personal interview, field staffers for the Biden 2020 campaign in Iowa, October 27, 2019, Iowa City, IA; personal interview, field staffers for the Harris 2020 campaign in Iowa, October 27, 2019, Iowa City, IA. Kamala Harris could not even keep a place in the race until the 2020 Iowa caucuses, despite her local campaign in Iowa being vibrant until she dropped out.

<sup>49</sup> “Internal Review Report for the Iowa Democratic Party: 2020 Iowa Caucuses,” 21–26.

<sup>50</sup> *Ibid.*

<sup>51</sup> *Ibid.*

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