



The Global CEO Advisory Firm

Teneo Insights Webinar

A weekly update from Teneo: Countdown to the U.S. Election (Part 1)

A discussion between Orson Porter, Steve Clemons, Colm O'Comartun and Kevin Kajiwara.

Thursday, August 6, 2020

Kevin Kajiwara (KK): Good day, everyone. Welcome to today's Teneo Insights Webinar. I'm Kevin Kajiwara, Co-President of Teneo Political Risk Advisory, calling in from New York City today. 88 days from now, one of the most anticipated and frankly dreaded elections in American history will take place. Whether 88 nights from now we'll know the actual outcome is a different question. But between now and then, Joe Biden will name his vice-presidential candidate, we will have two highly atypical and essentially virtual conventions where we'll see the formal nominations of both Biden and Donald Trump. There will be debates, maybe. A lot of campaigning up and down the ticket. And frankly probably a year's worth of so-called October surprises between now and then. And of course, all of this in the context of a still uncontrolled pandemic, unprecedented unemployment, historic economic contraction, and the largest social justice movement in American history.

So today we're initiating a series of calls between now and November 3rd that are focusing on the election and today's focus is to look through the prism of the Democratic perspective. So, joining me today for this important discussion are three friends and colleagues of ours. Steve Clemons is Editor-at-Large at The Hill, where among other things, he hosts their

coronavirus reports, interviewing consequential elected officials, leaders, and innovators, all very interesting. Previously, he was the Editor-at-Large of The Atlantic and Editor-in-Chief of Atlantic Live, the magazine's event series.

Colm O'Comartun, he is a Founding Partner of the Washington DC-based issue advocacy, public relations and public affairs firm, 50 State, which is a long-time strategic partner of Teneo's. Colm was the Executive Director of the Democratic Governors Association, and he was the Director of the Governor's Office of Martin O'Malley of Maryland. And finally, my colleague Orson Porter, he's a Senior Managing Director at Teneo who heads up our US Government and Public Affairs business in our office in Washington, DC. Prior to Teneo, Orson was the U.S. Director of Government and Public Affairs for Nike, and he served in the White House as a Special Assistant to President Bill Clinton. So please get involved in our conversation.

If you have a question, you can submit it in writing at any time via the moderator chat button at the top of your screen. So, let's get into it. Colm, I'd like to start with you, and maybe you could take a few minutes here to lay out for us, as you see it, the landscape going into this election. What's in play? What do we really need to keep our eyes on? And beyond the presidential election, maybe you



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can go down ticket here, looking at Congress, the governorships and state legislatures as the Democratic Party sees it right now.

Colm O’Comartun (CO): Yeah, happy to. Good morning and thanks. I think we’ll spend a little time on the presidential, not because everybody obsesses about the presidential, but because it’s affecting every down ticket race as the Republican Party has become the party of Trump, that is affecting every other race in the country. Look, the landscape here, this is a remarkable time. And the landscape is also a little bit unusual. But it’s within the context of the last six or seven elections that have been change elections, and the president unfortunately is no longer the change that people voted for in 2016. He is now the incumbent and he owns a lot of the things that he complained about that helped him get elected. He projected an America that was weak, an America that was in chaos, an America that was at war with itself. And the images on our screens today show a continuation or actually a proliferation of that image of America, and I think most Americans believe that he owns and contributed to a lot of that problem.

And the difference here this year is that it’s also not a choice between two candidates. It’s a referendum on his presidency, unlike 2016, and it looks like the president is struggling to understand that difference. If it were a choice between two candidates, two unpopular candidates, unlike the last election, Biden actually doesn’t have the negatives that Hillary had. And the main reason why Trump won last time was that in a choice between two unpopular candidates, independents and undecideds overwhelmingly went with Trump, and now they’re overwhelmingly supportive of Joe Biden, which is, again, I think the fundamental difference between 2016 and now.

We normally look at the economy, right track, wrong direction, job approval, for an indication about how

it’s going to go in the presidential election, and on the economy, while the public doesn’t blame Trump for the economy, they blame him for not resolving the coronavirus, which in turn has led to a deeper and longer impact on the economy and polling shows that. Unfortunately, his weak economy has taken away his rationale for why he wanted to run, and it isn’t giving undecideds who don’t like his culture war, or his personality a reason to vote for him. And now undecideds favor Biden by a wide majority, and independents favor Biden by 46 to 21.

On the right track, wrong direction, as we know, the polling has showed the country going in the wrong direction for the last 30 years, but these are unprecedented numbers. 72% think the country’s on the wrong track and only 19% think it’s going in the right direction. That’s normally a good indication of deep trouble for the incumbent. The problem for Trump, as we’ll talk about later, time is running out to change either the economy or his response to the coronavirus, and I think that time factor is the real issue, and I’d love for people to come away today understanding that the first votes are going to be cast in North Carolina in four weeks’ time. It’s very, very difficult to see Trump either persuading those that have left him or being able to persuade people that he’s got a handle on the economy or the coronavirus in four weeks.

On the job approval, of course, nobody’s ever won reelection with approval numbers like Trump, but Trump has defied some of those kinds of rules. This week, he’s got 54 disapprove of his job performance, 41 approve of this job performance. In these numbers, they mirror Bush and Carter who both lost their reelection bid. The four presidents since 1980 who got reelected had strong approval numbers at the end of the second quarter into third quarter. And in the polling, as we know, Biden’s horse race numbers have been very consistently giving him a 5 to 10-point gap

lead over the president, and he's in a much stronger position than Hillary Clinton was at the same time. He's got a nine-point advantage with RealClearPolitics and an eight-point advantage with FiveThirtyEight, and these are margins much greater than Hillary's 3.4% lead with RealClear and 6% lead with FiveThirtyEight at the same time in 2016.

And actually, if we go by the Gold Standard polling, he has double digit lead. Big trouble for Trump, there's been a sharp decline in Republican satisfaction with the way things are going in the country. They had been very solidly behind the president, and now they're starting to show some cracks and despondency from a 55% satisfaction in May to 19% satisfaction in June, and his handling of the most important issue with his own voters, they disapprove of his handling of coronavirus 58 to 37. Big issue, time is slipping away. 40% of the ballots cast before election in 2016 and 2018 were cast before election day. 40% of voters had already voted by election day. And that'll be way more this year with the coronavirus encouraging people to vote by mail, by absentee, or early.

And that leaves him very little time to turn around the alienated voters. And I think the reason the approval numbers are so bad is obvious. His continued alienation of the majority of voters who are women and non-white or who have more than a high school education. And all of those groups are growing groups. Women are the majority of the voters in the country and minority voters and college educated voters are a growing part of the electorate. He way underperforms the Republican Party's traditional support among women, Asians, Hispanics, and college educated whites. In fact, Asians consistently voted for the Republican Party by a majority until Trump's presidency.

But look, we don't have national elections in this country for president, and we have an electoral

college, and he lost by two million votes last time and still won the presidency. So all he needs is 270 electoral college votes, which means that really, when you take out the states that always vote consistently, we're really only left with six states that matter in this election, and he thinks that he's got eight million voters there who didn't vote for him in 2016, that he can turn out. Less educated white voters in Michigan, Wisconsin, Pennsylvania, Florida, Arizona, and Ohio. The problem is right now RealClearPolitics has Biden winning half the states, and with 352 electoral college votes to his 186, and Fox polling has Biden leading in Michigan, Minnesota, Pennsylvania by double digits.

It seems like an uphill challenge for Trump to pull back with some of those numbers. His poor numbers overall are putting in play states usually not in play, Texas, Georgia, Ohio. And that means that the Republican Party is spread thin as it tries to shore up its support in places like Florida and in Texas and in Georgia, because he doesn't want to be caught out like Hillary was and lose states that he takes for granted in his column. The reason why Trump is going to lose actually is because of his inability to focus on the economy, which is the only issue that he actually beats Joe Biden on with the public, in the public's mind. It's the one area that the public still believes him more capable of giving them the result they want.

He keeps coming back to the cultural issues, statues, Confederate battle flags, and settling old scores. And the voters just don't trust him compared to Biden to handle the biggest issues facing the country, race relations and coronavirus. And more than anything, he's lost the benefit of the doubt with the voters. He's still saying the country's in chaos. He thinks he's running the 1968 Nixon outsider campaign because he feels like an inveterate outsider, but really he's Nixon in 72 who had a strong economy. He's running as George Wallace in the suburbs, but the suburbs have changed as well. He's a little bit stuck in the past and

with no traditional convention, he's not going to get a bounce I think that each candidate normally gets after their convention.

Why haven't I talked about Joe Biden here at all, because it's a referendum on the president not a choice between two candidates. And as Joe Biden has said for 30 years, "I'm not running against the almighty, I'm running against the alternative." And I think that's really why it's less important how people feel about Biden as long as they don't hate them. So that trickles down to the Senate and in the Senate, because the party has become Trump's party and his numbers are dragging an anchor across the country, and this class of senators is a Democratic-friendly class of senators, unlike in 2018, when that class of senators that were up were favorable to the Republicans.

I think this is very, very likely that the Senate will at least tie, and that'll lead to a Democratic vice-president being able to add the deciding vote in the Senate, giving Democrats a majority in the Senate. The Republicans right now, 53 to 47 majority, let's give them Alabama because Doug Jones is going to lose in Alabama, so we give them 54, but in four states, the Republicans trail by 5 to 10 points. Colorado, Arizona, Montana, and Maine. And that's a very strong lead with such little time left. Mainly, the extra factor is, I think, the depressed Republican numbers in those states, which is a huge factor in the states where they are within the margin, Iowa, Georgia, North Carolina, Texas, and South Carolina, those Senate seats.

Joni Ernst, Perdue, Tillis, Cornyn, and Graham, they shouldn't really be as contested as they are. And again, that stretches the Republican Senate campaign committee's ability to flood in resources and gives Democrats a big advantage. So, we'd expect to see Democrats win at least four, and maybe one of these toss-up states, Iowa, Georgia, North Carolina, Texas,

or South Carolina. Republicans dodged a big bullet when in Kansas this week, Kobach, the Republican candidate in the primary was beaten by a guy called Marshall, and that's a much more electable situation so it takes Kansas off the map for them.

In the House, things are hopeless for Republicans in the house. There's no way they're going to win back the 18 seats that they need. There are already 20 Republican retirements. That's a huge number. And the Republican majority runs through the suburbs in Atlanta, Detroit, Philadelphia, Houston, Dallas. These are tough districts and the president continues to lose more college educated voters and he's now losing college educated men at a faster clip than he was.

Governor's races this year, this is a very quiet year for governor's races. I think Democrats may well hold steady, even though they have two tough states in play, Montana and North Carolina. The governor of North Carolina is up for reelection in a state that may go for Trump, but coronavirus has helped all incumbent governors, so it's given a boost to the incumbent governor of Montana who's running for Senate and his lieutenant governor is running for governor. I think that we could hold Montana and we should definitely hold North Carolina. But interestingly, because the president's numbers are so low in Missouri, it's giving us a shot against an incumbent governor Parsons with an excellent candidate Galloway. So not much change in the governor's races this year, even though we see really positive landscape for Democrats.

The map just doesn't lead itself to big changes there. This year, the legislatures, we know that under Obama, we lost nearly 900 seats across the country in state legislatures, and we've gained back 450 in the midterms. We'd expect to see a continuation of that across the country leading to hopefully flipping of legislatures in targeted state houses in Arizona,

Texas, Iowa, Minnesota, Michigan, Pennsylvania, North Carolina. The big ones would be Minnesota, Arizona, North Carolina, and Pennsylvania. And as you can see, they are all battleground states for the presidential election. And therefore, as the president's numbers go, we would hope to see Democratic wins in House and state Senates. That's it. Sorry I took so long.

KK: No, that's great. And thanks, Colm. That's a very comprehensive overview and it sounds a very compelling argument that the Democrats are going to have a very big night. Orson, I want to turn to you really quick here and see if there's anything you want to add to this foundation that Colm has built for our conversation here today. But also, in two weeks' time, we're going to host a similar call to this one, looking at this through the Republican lens. And maybe you could give us a little bit of a preview about what that panel is likely to say in rejoinder to the scenario that Colm just laid out.

Orson Porter (OP): Yeah, absolutely. We clearly see why Colm was a celebrated leader at the Democratic Governors Association, and I thought he did a great job and truly look forward to hearing from my dear friend Steve here shortly. A couple of things just to add on to what Colm said is when I was in the White House and working for mayors and other campaigns it's always follow the money and follow the TV ads. Biden just announced almost \$300 million ad buy that really highlights which states are in play and I think related to your GOP question, kind of talks about the reason why Trump is in Ohio today visiting a plant.

And those states not only included the six battleground states, but in addition to Minnesota, New Hampshire, Colorado, Virginia, Georgia, Iowa, Ohio, and Texas, along with Pennsylvania, Michigan, Florida, North Carolina, Arizona, Wisconsin, tells me that the battlefield has definitely increased and you will see

the GOP find themselves in states that they may not have thought about two or three weeks ago. And I think in our discussion in a couple of weeks with our GOP friends, it'll be about broadening the battleground states, expanding. You'll see Trump in some unusual places. You'll see Trump in front of some audiences that we may not have predicted.

And Colm rightly pointed out too that not only is Pennsylvania sending out their mail-in ballots, I'm in the great state of Wisconsin today and Wisconsin as well in September, along with Pennsylvania, is doing the same. So, I think on the GOP side, you will hear a lot of discussion about wanting to potentially expedite the debate because Colm rightly pointed out that a lot of those folks will have made their decision. The first debate isn't until the 29th of September at the University of Notre Dame, followed by the October debate at the University of Michigan I think is on the 15th of October.

So arguably in some of those battleground states and some of the expanding states that I mentioned, a large majority of folks will already have made a decision and/or voted before we even have the first debate. So, I think it's right to point towards the polls. I always argue that voting is the best way to validate polls in the way that polls are rolled out now. And in order to understand them, you have to be a statistician or have attended an Ivy league school to really understand what's going on. And polls have been accurate, and some polls have been well off, but the only way that we know the end result is actually by what happens at the ballot box or at the mailbox this go around.

KK: Yeah. So, on that point, Steve, let me turn to you because we have to wait for those votes to actually come in. But the media perspective here is going to be critical between now and then. So how are you and your peers seeing this and what are you gleaning from everything that Colm and Orson

just talked about, the polls and everything. I mean, separate the signal from the noise for us from your perspective.

Steve Clemons (SC): Well, thank you. And I really appreciate Colm and Orson laying out all the highways to this discussion. I'm going to kind of talk about some of the alleyways. Good morning, everyone. It's good to be with you. I think that the biggest concern that the media has, that we have, is not making some of the mistakes we made when we covered Hillary's race against President Trump's. I think Trump was underestimated. I think there were a lot of factors, whether you want to go down the Kellyanne Conway route of the hidden voter, you want to look at Russia or the impact of Comey. There were a lot of bank shots in that election that were simply missed. And so, I think the media is worried about bank shots.

And so, when you look at a country right now, which is traumatized by economic circumstances on par at least on the front end of what the Great Depression was like, 54 million people who have applied for unemployment, yet President Trump still, as Colm said, is still ahead of Biden. It's the one area where he does lead Biden is his management of the economy. And so that remains a resilient part of Trump's toolkit, if you will. But then you look at the racial divide, police brutality, the trauma in the country on that front and you then look at the pandemic. And in all the polls that I've looked at, there's nothing more than the pandemic and the administration's response that has impacted people's attitudes.

And I think Colm laid it out quite beautifully. And what you'd normally see is overwhelming support for the candidate from their own party, with the exception that with some of the trauma we would have had, you might've seen more deterioration in the Republican numbers for Trump. But you haven't seen that. Right? So that remains quite strong. And I think we, in the

media, continue to look at that, both surprised but trying to tell the story that there's more resilience in those numbers, despite many of the other factors. And in the independent crowd and something I think a lot about, I'm an independent and I sort of look at myself and I think independents are remarkably fickle.

I think the memory that they have for this event or that event is weak and thin. And they are out there ready to be hijacked by any moment, any switch, any bank shot or any shift that the President or Vice President Biden might make. And so, in that independent area, it really was remarkable, both with Republicans who, nonetheless, many of them see the country not necessarily going in the right direction, but they see the president is not to blame. But it was really Lysol day, the disinfectant day when President Trump was doing well across lines with the impression that he was handling the COVID-19 problems fairly well until Lysol day is what I call it. And then you saw sharp deterioration.

You saw cancellation of those daily briefings, and you saw a shift in the public, particularly among independents, where it kind of brought up that Michael Lewis, if any of you read the Michael Lewis book, *The Fifth Risk*. *The Fifth Risk* is project management, project management being something that many people who left the Obama Administration, or who were career civil servants, feared that the lack of expertise, the lack of competence of those people coming into the Trump Administration would not be able to manage simple nuts and bolts things. And those nuts and bolts things would come back and bite America if you will. And I think that is very hard to undo in the few months that are left. And so, when you look at that book that was presciently written years ago about what the biggest challenge to the Trump Administration would be, that is one that just kind of hovers there.

So, from the media perspective of trying to sort of separate these questions, and I must say that there are a lot of contradictions out there. One of the other interesting polling things that you look at is that people overwhelmingly support Black Lives Matter or the notion and idea of it, if not the institution. They also support police departments and policing and worry about crime. And they can hold those two elements of support together. And I think it's the same thing when you look at the economy. We'll have to see what happens with this next package. If there is no package, who will be blamed. If there is a package, who will get the support and applause for that. And is there a sense that suspending that aid to the economy, if that's the direction that this all goes, is one that the Republicans will continue to support because a lot of Trump supporters are on those lines of the employment challenge, if you will.

So, I think when you kind of look at this question of separating signal from the noise, it's looking at, number one, what are the bank shots that we don't fall into the habits of mind and habits of coverage that we did in the Hillary-Trump race. And then I think looking at this and understanding that Trump has an incredible proclivity to be unpredictable and degenerate things. The last thing I would throw in really quickly that I'm paying a lot of attention to, and I think it's interesting, is China. The demonization of China right now, for which there is a lot of public support. There's overwhelming support that China is an enemy or rival, something to be contended within. So, Donald Trump has sort of helped engineer that.

Now when I interviewed Vice President Biden in the past, he was one of the architects of constructive engagement with China, and built a relationship with Xi Jinping because he was Vice Premier of China at one point. Biden laid out the Sunnylands Summit for Obama and Xi to meet. And so, they have more of a policy and posture of constructive engagement,

not walking back lines on human rights or certain intellectual property protections. But it's going to be interesting because China's one of these issues that does seem to percolate right now.

And I'm reminded that when Obama ran against Romney, China was huge then too and they were both declaring that they would each on their first day of the campaign or first day of office declare China as a currency manipulator, for instance. That didn't end up happening in the same way, but the intensity around China continues to be something there. And so I worry a lot about Trump's ability to change the global environment, to create some sort of October surprise. And so, I think, again, from a media perspective, we're looking for surprising elements right now that might come up rather than the trends we see today. And I'll stop there.

KK: You know, Steve, in his laying out of the big picture, Colm made the point that voting is actually going to start in about a month's time, well before election day. And the track record that we've seen through the primary season here in terms of getting these votes, these mail-in ballots and the like counted in an expedited manner has been not particularly impressive. And I'm wondering, the media is going to play an incredibly important role in legitimizing the outcome of the election. Is the media properly setting the electorate up for this playing out, that we may not have the final results even on the night of November 3rd and that that's okay technically?

SC: I think we are. Yeah. I mean, I think we are. I think the media is honestly. When you had the Bush-Gore collision, I think the media stepped back and covered what was, not what people were trying to posit it would be. We'll have to see what networks like MSNBC and Fox do. I suspect that both candidates, as it happens, are going to come out and say they're in the lead or

that they've got the hook. I think what the media is worried about and we're worried about it and I think Democrats are worried about it, a lot of folks are worried about it, is what is Trump's behavior if it looks as if the deck has gone against him.

And regardless of the counts, regardless of those issues, I think the media, at least we are asking the questions of what if the president does what he says? What if he doesn't accept the results that seem to be unfolding? What if he begins to call the process there that we'll see unfolding as votes are counted and there are delays and it's highly unlikely that we'll know the winner the night of November 3rd. I think that in that case, I think the media will call it as it is. But I think many of us are worried that you're going to see other kinds of behaviors that we haven't seen from an incumbent administration before if the vote turns that direction in favor of Vice President Biden.

And in that case, even if we don't know the final outcome, then the question is, what does the President do? What does the Congress do? What do the other parts of government do? I think the media is going to become so obsessed with telling that story correctly, that we will set the right tone. But what I don't know is whether the parties involved, and particularly in this case the president's party, will be willing to allow that tone to be set by the media. I think they are going to be potentially in a very different place and we've seen that in comments from the president already. But we'll have to see how that goes. I don't want to disparage anyone before those actions have taken place. But there is a worry that the de-legitimation of the vote won't come from the media. I think that will be something that comes from other players in this.

KK: Colm, I spoke to a number of my colleagues over the last couple of days in advance of this call. And I think a lot of them would be very relieved to hear the scenario that you laid out at

the beginning, but it's clear that they are also very concerned and wounded and still scarred by what happened in 2016, where the polls suggested one outcome or it was interpreted that way, and then there was a big surprise. I guess my question then is what is the strategy versus Trump here? I mean, he, as you pointed out, he is no longer the what if candidate, everybody now knows what this presidency looks like and what it will mean going forward.

He's been exposed in his tenure, for better and for worse, to the point where interviews, like the one that Chris Wallace did, and then obviously the Jonathan Swan Axios HBO interview this week. It's shocking, but there's no particular surprises in there, in a way. But is it really the old maxim, from the Biden perspective, of when your opponent is shooting himself in the foot, don't take away his gun? Is there a strategy to really harness the momentum of Black Lives Matter and the social justice protests to bring more people into the tent? Or is it a focus on those who are already known and in the tent? I mean, sometimes through all of this, it feels like the Lincoln project has been as effective as the Democrats have been in terms of positioning Trump.

CO: Yeah. So, I think do no harm is job number one and it's really working for Biden. Much in all as Trump accuses Biden of hiding out in the bunker. I mean, the Trump show is impossible to compete with, but as long as the Trump show is getting the President into deeper problems, then the longer we need to allow it to go on. For example, we know that the President's strength is the economy, and yet the President never talks about the economy. We don't hear the President really talking about what Joe Biden's economic plan is versus his economic plan. What we hear him talk about are distracting other issues that I think the President has a misunderstanding of where the public

is. And we know that from polling, when it comes to suburban voters, in relation to Black Lives Matter, in relation to racial issues and actually where Joe Biden scores his highest marks, polling points with the public, is on his ability to unify the country.

Which candidate do you think would do a better job of uniting the country? By far and away, the majority of voters think Joe Biden is that guy. And I think there's a level of exhaustion and a level of desire for a more calm and rational approach to governance that we can see in the numbers. And I think that calmness that Biden exudes is really a secret weapon for him. So first, do no harm, and I think he's doing a good job on that. Secondly, it is different than 2016, just if you look at the polling, just because Biden does much better with all voters, and does even better with Democratic voters and constituencies that, you would think, would be Democratic than Hillary Clinton did. So that polling failed the last time to account for a couple of things, the deep animosity towards Hillary Clinton and a turnout of traditionally non-voting white rural and small-town America.

I think the model has been changed to reflect that and so there won't be quite the polling surprise that there was before because polling asks a lot of people's opinions and then has to guess how many of those people are going to actually come out and vote on election day. And then the other factor, I think, is an organization question that you're asking, and I think that's a little bit more challenging and difficult. I think that this week we saw the Trump campaign announce that they've knocked on a million doors and the Biden campaign announced with some pride that they've knocked on no doors because they think it's not appropriate, this is not the year for that. And I think that it's a difficult time to campaign.

It's difficult obviously, to do any in-person events. Trump, of course, is suffering the most from this

change in campaign environment, because he thrived off his rallies, he got energy from the rallies and it was his most effective campaign tool. And that's been taken away from him, but both campaigns are going to struggle. So, what's the plan? I think that we have to acknowledge that Biden had to reorganize his campaign after his primary run, acknowledging that the campaign was not effective and not in good shape. And hopefully he got a jump then on Trump who just reorganized his campaign. So, I hope his strategy doesn't make the mistakes that Hillary made of neglecting the states that are going to be pivotal and crucial; the Michigan, the Minnesota, the Arizonas, the Floridas.

And also, don't forget your constituencies in your traditional constituencies. I will say there's a slightly worrying couple of numbers out there that I think the Trump campaign understands, but I think the Biden campaign needs to get on top of, which is that Biden is underperforming with Hispanic voters and Black voters. And so, the gap between Hillary's election day result and Biden's current standing with those groups favors Trump. So, for example, he is 10-points behind Hillary when it comes to the Hispanic community, and he's five-points behind Hillary when it comes to the Black community. That doesn't mean that that 10% is going to vote for Trump, and it doesn't mean that the 5% is going to vote for Trump, but right now they're undecided and they've yet to be reached out. And polling shows that these demographic groups are telling pollsters, they want to hear from the campaigns, they don't want to be taken for granted. And I do think that's an issue that Biden is going to have to address. But otherwise, his strategy of letting Trump kill himself, I think is very effective.

SC: Kevin, can I add one thing to what Colm has said?

KK: Yeah sure, go ahead Steve.

SC: I really like Colm's framing, but the one thing I would add is, when Hillary and Trump were running against each other, I did an interview with the Vice President and he made an astounding statement that the Democratic Party had become a party of snobs or seen as a party of snobs. And I think that that is part of what Biden is trying to undo and just sort of do battle with Trump on that notion that it can be this big tent party, but also appeal to frustrated white working class folks who feel demeaned and denigrated and left behind, in addition to the other groups that Colm said. And I think that's one of the things that I think is really fascinating about this race is that Biden would normally do that by being out there with workers, by being out there at the line, rope, shaking hands, and meeting people and bringing that Biden charm.

Chuck Todd called him the most natural politician ever and I think the challenge with Biden is, can that be conveyed remotely and virtually in a time of COVID? I think it's a huge challenge for them, but it's one that goes right at the core of why Biden is running and how he sees himself. And I'm not sure how it's going to translate, we'll see how they deal with that. So, I just wanted to toss that in there that, that ability to kind of personally connect with lots of different people. And the other thing I would add to that is the way that Trump handles that, of can you do it, is to be the guy who attacks science. Science has become a politicized issue today. When you watch the pressure that Fauci is under, not that we're reminded, we don't remember this, but it looks like the trials of Galileo, right?

Science on trial, science is not your friend, science is not delivering to the average person because it's part of the establishment that has screwed middle America, if you will. That's how the Trump team is trying to wire, to a certain degree, that dimension. I just want to put that, it's a nuance, but it's an important one about how you convey, whether you're going to be able to engineer things for that frustrated white working class

part of the equation, which we haven't talked much about. I do think that that's part of why Biden thinks he's running and what he thinks is part of his edge. I don't know if there'll be able to convey that.

KK: Yeah. Orson, Colm early on laid out, I want to pick up on what both Colm and Steve were just talking about here through another lens perhaps. Colm laid out earlier that because of the unconventional conventions that we're about to have, that it's unlikely to get the bounces coming out of those. But one big event is looming out there in the near future, and that is the vice-presidential announcement by Biden and I wanted to hear your handicapping of that internal race. But within the context of what these guys were just talking about, Obviously, there's a decent chance it will be a woman of color. Will it matter in a sense, right? Could that regenerate some of that missing energy, perhaps, and then the other question would be what is the GOP doing to exploit that Black and Hispanic vote deficit that these guys just talked about?

OP: Sure. Couple of things I would say. One, I mentioned I was in Milwaukee today and yesterday the Biden team announced that they were pulling out of giving the speech here in Milwaukee, and the Mayor held a primetime news conference. And I drove through downtown Milwaukee and regrettably, I noticed that there really wasn't any real signs that the convention was happening anyway. And a lot of party leaders had come to that conclusion. And Milwaukee is a fairly diverse city, high African American population. If the African American population doesn't come out in the state of Wisconsin, it makes it harder for people like Joe Biden, or as you saw with Hillary Clinton, to win.

And as I walked through the grocery stores, the number one discussion is that the convention and Joe Biden, it isn't what was on the news related to politics. It's all about survival, COVID and back to school, and people trying to live kind of their daily lives. So, as Steve said, I think, as you get away from the bubble and people start focusing in on this election, yes, the polls indicate one thing, but this COVID thing is a game changer. And in Milwaukee, as I speak, they have an upcoming election and they're having a hard time finding poll workers to do their jobs, and I think you'll see that throughout.

But typically for the Black and Brown community, the COVID thing, it will be a, not necessarily a distraction, but a major focus and could tap into the enthusiasm of folks wanting to expose themselves if they are voting by absentee or mail-in and to actually go to the polls. So it's something that I am concerned about, it's something that I'm noticing, that I also noticed when I was home before the last go around, of the lack enthusiasm, particularly in the African American community, which I think a Colm rightly pointed out, but with this COVID thing, it's very particular because that community has been impacted more than any other community in the United States.

So, having said that, the VP choice will matter. And it definitely seems as though it's leaning towards an African American woman, with three candidates in particular that are at the top of list, Susan Rice, Senator Harris and one other. So, does it matter? I think the Obama connection is the number one key in the battleground states for Biden. I think that you will see Michelle and Obama kind of own that geo-TV roll out for the Biden team. And I think the VP candidate will be secondary to that and help support. But I don't think, because the African American community is now expecting it to happen, that it will push them over the top to do anything differently. I think what would happen is by deciding not to go in that direction, then

you would see a lot of concerns and potentially people staying away from the polls, should he not select, which I don't think so.

So, if I had to handicap, Senator Harris definitely looks as though she may be the logical choice, but logical choices usually on VP nominations never happen. So, I would imagine, in the next four or five days, we'll have an answer to that question. And I would imagine that African American voters and Latino voters will respond positively. I would imagine that if it is Susan Rice, then President Trump may be the happiest and that Republicans feel as though she's a great nominee to go after. But it really all comes down to, at the end of the day, people's enthusiasm to do, as John Lewis talked so much about, getting out there to cast your votes and the VP thing is important, but I don't think it's going to weigh a whole lot at the end of the day.

The only thing that would be a game changer is if Biden decided not to elect an African American candidate, which it looks as though 98% possibility that that would happen, but you never know. And Steve and Colm, I hope will support me in that, until it's decided, is not decided, and there's a reason why they're waiting. So, as they go through the public vet, anything is in the realm of possibility over the next couple of days.

KK: And just to pick up on the final part of my question, I wanted to ask all three of you, are you seeing or picking up on specific tactics to drive a wedge between the Biden candidacy and Black and Hispanic voters, beyond the President's claiming that he is the best president for Blacks since of Abraham Lincoln. Is there anything else specific that's happening on that front?

CO: Well, I think initially Trump had a real sense that he could make inroads with Hispanic and Blacks, but I do think that that strategy has been thrown into

disarray due to the chaotic nature of the last year. And I think Hispanics and Blacks have not, particularly African Americans haven't loved Biden, but they continue to vote for him in the primary, even though they weren't enthusiastic, but they did come out and they did vote for him in the primary.

I think it's difficult for Trump right now to have a coordinated and successful strategy while he's bleeding in other areas. Because the one thing that we're not talking about is the fact that he's down 20 points with 65-year olds and older. And so, for him, he's got to solidify his base rather than try and do something that's very difficult, which is to attract African Americans to him. Of course, he can try and depress the vote and hope that they stay home if his understanding of the Michigan case is that he won Michigan because Black voters in Detroit didn't turn out in the numbers that Democrats hoped for. So, just as you say, trying to drive a wedge, I think that's where Susan Rice is a more complicated choice, because she's got Benghazi and you can frame her up more easily because most people don't know her and she's got a history that most people will be learning for the first time.

But I do like Biden's strategy of being more public with his vice-presidential selection. It allows a lot of these 'got you' issues to be surfaced before the announcement. And therefore, if you remember, when Sarah Palin was picked, we were learning about her all the time and new information. There won't be as much new information about whoever it is that Biden picks. I think that's a very smart move, and I think it'll limit any damage that comes up whatever choice he makes.

SC: What I would say really fast is President Trump's Goya day sort of suspended their creative, their efforts with the Hispanic community. And I think that when it comes to your real question, which is, what are the tectonics inside the Democratic Party between

moderates in the last over race, and there are different potential tensions there. I think you have to give the Biden team enormous credit on this, because I was one that saw a Democratic civil war sort of underway when Bernie was still in place, and you still had Elizabeth Warren in play and AOC to a certain degree was in a way at that moment, her presence was sort of felt in a proxy way through other folks.

And at least for right now, all of those potential earthquakes have been postponed. It doesn't mean that they've gone away, but I think the Democratic Party has made this about Trump, his governance, his choices, and not necessarily about these internal tensions, and I think that's very interesting. I think the deaths of Elijah Cummings and John Lewis, something we haven't talked about this morning, I'm really glad that Orson brought up John Lewis, is this broad question that I think is going to animate a lot of people, particularly women and particularly women over 50, but there may be others that are animated. This is just the fragility of rights in this time. John Lewis and voting rights, but whether it continues to be LGBTQ rights or broad rights across the board, as you look at the fragility of that liberal wing of the Supreme Court, which is another dimension of this race that we haven't talked about. But I think it's going to take on more traction as we get closer.

KK: Yeah. And this is a subject that I think will occupy an entire call for us at some point in the future. But I want to pick up on one thing you just brought up on a more tactical level, Colm. This question of voter suppression, not to mention the issues of de-legitimizing the mail-in vote and so on and so forth. I guess my question for you is, does the Democratic Party have the legal army in place to litigate this if necessary? I think everybody's got the memory of 2000 and in Florida and that one of the issues, irrespective of the outcome, one of the issues was that the Bush team had just a much

better legal ground team in place and ready to go than the Gore side did. And are they ready?

CO: Yes. Marc Elias leads up that effort on the Democratic side. Marc was not utilized in the Hanging Chad situation. And I believe that's a major factor as to why we did not prevail in that situation. Marc, we used him at the Democratic governors, and everybody uses him. He's a major force in the Democratic Party. He's a legal wizard who rarely loses a recount and is very aggressive. In fact, he's now formed a pack to not just deal with the consequences, but to be much more aggressive in mitigating potential legal problems, getting him out in the public and letting people see into the machinations of what's going on. But in fairness, the problem that Democrats face is real, there's some just logistical challenges that we face in the voting apparatus. Poll workers, as Orson said, tend to be older volunteers.

They are not going to be available, shutting down polling stations, even if states want to have that available to voters, and some voters are very wedded to that type of voting. Registrations are way down because the registration effort online is where it was. But most new registrations happen at DMVs, outside shopping malls, outside movie theaters. And that effort has really slowed. And if you picture who gets newly registered, they tend to be young voters, new voters, more diverse voters. But that's a challenge for Democrats that they're trying to tackle head on.

And remember, only 43% of eligible voters under 30 voted in 2016. And so we need to capture all those voters. So yes, I think on the legal side, we're going to be okay, but on the logistical technical side, it is 50 states that you've got to watch both the practical, that the practical is working, and then the legal machinations. Here in Maryland, what we have is again, that debate that's going to range across the country where the Republican governor did not

allow us to do a mass mailing of ballots. And now is expressing distress that the ballot kind of request process is not moving as fast as he would like. Well, we all know that in states that have very successful and a long history of mail-in ballots, they mail the ballots to all eligible voters. And I think that that is going to be the battleground. And the more eyes that are on it, and the more we can publicize what that really means, I think the better it'll be for Democrats. But I do think we've got the right people in charge. It's just a gigantic effort.

KK: So, we've got just a couple of minutes left and I have one final real question and then follow for Steve and Orson. So, Steve, you brought up this point of the post sort of postponed reckoning within the Democratic Party, Steve and Orson, it seems like Colm laid out at the very beginning a scenario for a Democratic sweep on election night. Taking the White House and commanding both houses of Congress. If that happens, and I know this call is primarily about the election, so I am going off-piste here and thinking beyond the election here. Do you think there will be a real reckoning then within the Republican Party, if that were to happen or Trump will be forgotten, but they will double down on Trumpism and the populism?

SC: That's the, you know, I don't know what to call it any more than the 900-pound question. It's absolutely, my gut feeling from talking to lots of Republicans behind the scenes. And I do spend a lot of time with both House and Senate members of Congress. My sense is at the moment, I look at Donald Trump as sort of a rock star who's out there, and the moment that rock star begins to fall, they're going to fall fast and no one will remember that they ever supported them or that they ever listened to that person's songs. And I could be very wrong in this, but I think the knives will come out fast among some Republicans. That

doesn't mean that the people, the evangelicals have a natural place to go, or that many of the constituent anti-science parts of the Trump base have a natural place to go, but it gives an opportunity for a different narrative to come in and potentially harness the Republican Party and take it a different direction.

I sort of feel that is a likely track, but a lot of people disagree with me. But just talking to Republicans that are in leadership positions now, if Trump were to fall like that and the calculus were to change and he were to lose dramatically in the kind of sweep that you just described, then I think that's a scenario that could be considered. But I don't think Trump is going away, when you look at the One America News Network, you look at how he's courting them. You look at this notion of what's Trump's afterlife. I don't think Trump or Trumpism or the Trump bandwagon necessarily goes away. I think its power diminishes a lot, but he comes a major thorn in the side of whoever is governing. And I think it becomes a complicating factor politically in the country, and that will remain there, but I think it will be diminished.

So, if you will, I think you're going to have a competition, much more of a competition for the party and what defines Republicans after Trump loses than most people think will be the case today. He isn't going to be completely knocked out of the race, there will be some support. But it gives space to a different kind of Republicanism. So, I'll stop there.

KK: Well, we are at the bottom of the hour. So, I'm going to ask just one really quick, final question to you guys. And if you could just each answer, one-word answer, frankly. But Colm, Democratic sweep on in this election in the White House, Senate and House?

CO: Absolutely. All the evidence points that way.

KK: And Orson and Steve, do you guys agree with that?

SC: I worry about bank shots. I'm going to keep my powder dry. I think if the election were held tomorrow, Colm would be right. I think that's the way things are tilting as a lot of pollsters have said, but I think there are too many unknowns out there yet. And Trump is so highly predictable, particularly in foreign affairs that I just worry about things coming and suspending. So, in the spirit of the media calling it wrong, getting it largely wrong the last time, I will just keep my powder dry and say, I don't know yet.

OP: Okay. And quickly I'd say I was in the White House during the Gore-Bush election, and we didn't know who was coming in to take over public housing there until mid-December. So anything can happen. And mail-in ballots, absentee ballots will be a lengthy long court case. So hard to say. It definitely is leaning that way. I do, as I said earlier, this COVID thing is serious. And if things get worse, which is in the realm of possibility, then I think it's really hard to predict anything after that. So too early to call, but expect a long, lengthy court, legal debate, before we can answer your question with any kind of facts.

KK: Well, and with that, we have gone over the time. I want to thank all three of you. Colm O'Comartun, and Steve Clemons, and of course, Orson Porter for your participation. And thank our audience for joining us this morning. We're going to be doing more around the election and post-election politics over the course of the next several weeks. In fact, in two weeks' time, we will have a conference call similar to this one. Looking through the Republican lens with another set of our colleagues. So, thank you very much for joining us today. Thanks gentlemen. Have a great day and a great weekend. Thank you very much.



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