

To Hawthorn Friends & Family –

Opening apologies for a too-long email . . . but, with no conventions as we have known them since 1952, it IS about time to “set the stage” for the final phases of this election year.

This past weekend marked the 100-day calendar point from the November 3rd General Election. So it was timely that my good friend **Eric Sapirstein** – the capital’s preeminent expert on water policy issues, especially in California – asked me for my current predictions.

We ARE 100 days out. And when one thinks (beyond, as my wife Ivy suggests, of the old song from our wasted youth, “100 Bottles of Beer on the Wall”) of what has happened in the LAST 100 days (and all the mistakes, at least mine, predicting the last presidential election), one is humbled at the daunting task of producing a reliable prediction.

It is obvious from the polls (especially recent battleground state polls) that if the election were held TODAY, Vice President Biden would win. But, as we all know, the election isn’t being held today. It is being held November 3, with voting throughout the weeks (and almost months) prior thereto.

We don’t have an election DAY this year, nor even just an election month. Early voting starts in Minnesota on September 18 (that would be in 53 days), and California mails out ballots to all 20-million-plus registered voters on October 5, with military and overseas ballots going out September 19.

That said, what’s our prediction?

If I had to give odds today, I’d give:

- Biden at least 60-40 odds of winning the White House,
- The Democrats at least 50-50 odds, maybe slightly better, of winning the Senate, and
- The Democrats at least 80-20 odds of keeping the House.

But there IS a path to re-election victory for President Trump, to bring back “home” his previous supporters whom polls suggest he has lost (and maybe turning out non-college-educated white voters who failed to vote in 2016) and hold onto GOP control of the Senate . . . just as there IS a chance for a Democratic landslide, sweeping the Democrats not only into the White House but also into control of the Senate and winning some marginal state legislatures in this election year critical to next year’s redistricting and reapportionment.

The White House --

Despite the current poll numbers – which **Charlie Cook** and **Anna Greenberg** brilliantly analyzed in a podcast last Friday – and the unrelenting beat of bad news for the administration, there IS a path to re-election for President Trump. But it is a VERY narrow and an increasingly unlikely one.

In addition to the Trump campaign’s attacks on Biden (raising Biden’s negatives to/past where Senator Hillary Clinton’s were four years ago) and the GOP battle to re-take the suburbs (a challenge the Trump campaign has known it faced since the disastrous congressional elections in 2018), for the President to win re-election, most – if not ALL – of nine things have to happen:

1. There has to be a CREDIBLE announcement of a COVID-19 vaccine, with a believable timeline for mass distribution.

I have no clue if that can/will happen, but the administration (and the drug companies) are certainly laying the groundwork for it (note the President’s and Vice President’s vaccine-related visits this week to two battleground states, North Carolina and Florida). This is probably the most likely “October surprise” about which Washington’s chattering class chatters endlessly.

2. America’s COVID numbers have to improve. We have to recede, markedly, from today’s plateau (if it IS a plateau), not have it be just another step on a continuing upward spike. Again, I’m not competent to assess/predict, but according to the NEWYORK TIMES, more than 70,000 new cases a day were reported on both Thursday and Friday of last week and numbers have risen in 42 states over the past 14 days. USA TODAY’s analysis of the Johns Hopkins data from last Friday showed record numbers of new cases in 11 states (including California and Georgia) and record numbers of DEATHS in 10 states (including California, Florida, Georgia, North Carolina and Texas).

Is this the “end of the beginning?” Will this recede by the time people make up their minds and vote? Who knows? It seems especially critical in the ultimate battleground state of Florida, without which the President seemingly can’t win re-election. Nationally, we could be looking at 175,000 or more total deaths in the United States by voting time. Assuming each person who died knew 200 people, that’s a personal impact on 305 million.

3. Riots and protests have to be handled effectively, without abuse by federal forces and without abandoning cities to rioters. It is only late July. We still have a lot of “the long, hot summer” to face.

If EITHER the President or the protestors overplay their hand, there WILL be election consequences, reflecting lives consumed by bitterness, fear, and hopelessness, in the cities, in the suburbs, and beyond. And that seems more likely than not when the headline in yesterday’s USA Today was, “*Live updates from weekend protests: Man shot to death in Austin, Seattle police declare riot, armed militia in Louisville.*” Portland remains a

permanent riot, with shootings over the weekend. Chicago is under threat. There was destruction over the weekend at VCU in Richmond.

4. President Trump has to stay on his new reasonable message, cancelling the GOP convention, admitting things are “going to get worse before it gets better,” and supporting continued federal relief (giving up on a payroll tax cut).

If he gets distracted by preserving Confederate monuments, fighting with Dr. Fauci, imposing troops on cities, or “forcing” the reopening of schools, he is doomed . . . except with his own base, which is insufficient by itself to produce re-election. And he has to find venues for campaign appearances that work for him and his voters without endangering attendees.

5. K-12 schools and colleges have to manage successfully re-opening/alternate learning, without heavy-handed threats by President Trump and without compromising student/family/public safety.

Polls show parents are strongly opposed to re-opening and many major districts have already decided to delay, adding stress, which the President deplores, to suffering families and students but protecting them (and us all) from spreading the virus. But, of course, keeping kids at home only exacerbates child care problems . . . for those parents with jobs still to go to.

6. Fall sports, especially football, need to happen, at least for the sports obsessed. But, conferences are almost daily announcing cancellation of non-conference games, if not entire seasons. Michigan State quarantined their entire football team for two weeks last Friday. As one major university trustee said in an email to me, “You’ve got to be nuts to think we’re going to play football this fall.” Hard as it is for the son of a football coach to recognize, this may be an opportunity for soccer to gather more U.S. fans. Yesterday’s “Meet the Press” was preempted by “Soccer Championship Sunday.”

7. The stock market has to hold, businesses have to stabilize, and employment has to start recovering. So far, at least for some sectors, the market IS holding. But unemployment is rising (most dramatically in the airline industry and among its suppliers), and is likely to worsen as more businesses seem likely to close permanently. So far, we count among the major bankruptcies (and closings and layoffs) Brooks Brothers, Chuck E. Cheese, GNC, Hertz, J. Crew, J.C. Penny and Papyrus.

8. Relief has to be renewed, instantly and seamlessly, and the Senate has seemed incapable of doing that. Indeed, until new hopes for progress came out this morning, it looked like they might leave for their August vacation without doing it – and they still might – further damaging the Republican (and Congressional) brand(s).

Headlines in POLITICO on Friday included, “40 million Americans face student loan cliff” and “Renters brace for evictions as moratorium ends.” The projection is 24 million won’t be able

to pay their rent next month. With schools increasingly not opening, students (and their families) will go hungry. As businesses increasingly give up hope and close permanently, unemployment is going to rise (and local/state tax revenues plummet).

9. There has to be a MAJOR Biden gaffe (or several) that calls into unignorable question his age and mental acuity. He WILL be older when he takes office than President Reagan was when he left office.

Do ALL nine really have to happen for the President to be re-elected? Of course not. He (and we) could survive no fall football, even in this sports-obsessed nation. And he will never stay entirely on message. AND some Biden gaffes are already “baked in” to everyone’s expectations. But MOST of these have to happen if he is going to be re-elected.

And BEYOND those nine, there are, of course, other “unknowns,” both (as Donald Rumsfeld would say) “known unknowns and unknown unknowns” . . . from the international scene (on which China is becoming the GOP’s favorite “whipping boy”) . . .to WHO will actually vote by mail and how WELL the voting system will work this year . . . to WHEN we’ll have results and WHETHER, if they are close, the President will accept them.

The U. S. Senate –

The current Senate is 53 Republican, 45 Democrat, and two Independents (or, in Bernie Sanders’ case, a near-Communist) who caucus with the Democrats.

IF Biden is elected President, the Democrats need to pick up a net of three seats to have a tie, giving them, with the Vice-President’s (whomever that may be) vote, control. If Trump wins re-election, the Democrats need a net pick-up of four seats.

And the Democrats likely start by LOSING one. Incumbent Democrat Doug Jones is unlikely to be re-elected in Alabama, probably losing to former Auburn coach Tommy Tuberville (who badly beat former Trump – and despised by him – U.S. Attorney General and long-time U. S. Senator Jeff Sessions in their primary and run-off).

The problem is there are only about 700,000 Democrat votes in Alabama and about two million votes will be cast for November 3. Absent an epic landslide for Biden –including (HIGHLY unlikely) in Alabama – that seat shifts to GOP. So, the Democrats likely need to flip four GOP seats to Democrat to control the Senate in a Biden presidency, and five in a Trump presidency.

Democrats SHOULD win over current GOP Senate seats in Colorado and Arizona. That’s two.

Three contests for now-GOP-held seats are currently toss-ups: Maine, North Carolina, and Montana. IF the Democrats win all three, that’s five. But that means “running the table” . . .

which seems unlikely, absent a Biden landslide (which IS, as noted above, not impossible, maybe not even implausible).

AND some stories/analysts/Democratic hopefuls argue that even one or both of the two seats up this year in Georgia are in play, along with a not-to-be-dismissed shot at Kansas and, even, South Carolina.

We'll know August 5 if the GOP nominee in Kansas will be the divisive Kris Kobach who lost the last governor's race there. But even if it is, as I have previously noted, the last time Kansas voted for a Democrat U. S. Senator was in the FDR landslide of 1936, 84 years ago. And we won't know the outcome of the second Georgia seat until the run-off in early January, sure to be heavily influenced by the Presidential outcome (if we know THAT by January).

To paraphrase something I heard a far smarter analyst than I say a few days ago, it seems more likely the Democrats will, if Trump is re-elected, ALMOST but not quite win control of the Senate OR, in a Biden landslide, win OVERWHELMING control. What seems least likely is the Democrats will tie for control or win it by only one vote.

U. S. House of Representatives –

The current count is Democrats 232, Republicans 198, Libertarian 1, and vacancies 4. Notably, 27 Republicans and 9 Democrats have decided not to seek re-election to the House, retiring or seeking other office.

All analysts agree Democrats will keep control, the only question is marginally more or marginally less. A story Saturday about how Jared Kushner and the Trump campaign are NOT supporting shifting any money from the Republican National Committee to the House Republican campaign committee, despite Minority Leader Kevin McCarthy's plea, suggests they are accepting the inevitable and are not going to waste money on a hopeless "tilting at windmills."

Of course, the long-term danger for the Democrats if they keep control, is the increasing "aging" of the Democratic Party, especially in the House. When the new House comes in in January:

- Speaker Nancy Pelosi will be 80 years old
- Majority Leader Steny Hoyer will be 81 years old
- Majority Whip Jim Clyburn will be 80 years old
- Appropriations Chair Nita Lowey will be 83 years old
- Financial Services Chair Maxine Waters will be 82 years old
- Science, Space and Technology Chair Eddie Bernice Johnson will be 85 years old

Of course, California's senior senator, Diane Feinstein, is 87. Sitting across the partisan aisle is the senior GOP senator and Senate President Pro Tem, Iowa's Charles Grassley, at 86. They could form a joint Octogenarian Caucus.

While this gives hope to a 70-year-old like I, it can only be enormously discouraging to the next generation(s) of office holders and wished-for candidates.

Here's hoping I continue to survive to write these too-long missives . . . and hoping you stay well to read them: healthy, safe and reasonably sane,

John

