

case study

Political Events: The 2020 Iowa Caucus

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Introduction

A scan of the existing academic literature and industry association websites reveals a dearth of resources devoted to planning political events. This is surprising since political events are ubiquitous and longstanding. They are held by community organizations, political parties, and political campaigns as a means to communicate with voters. While this case study focuses on presidential campaigns in particular, readers should keep in mind that political events are ubiquitous and are held with local and state officials as well. On major campaigns, "advance staff" are the event planners, looking for campaign venues and making local arrangements.

Political events are defined as a meeting or gathering of two or more people in order to elicit a political goal, agenda, or influence. Political events tend to focus on some aspect of a political agenda, drawing influence upon various event attendees. Political events in the United States have been around a long time. For instance, William Henry Harrison was the first president to campaign by train in 1836, with stops in local communities across the country. The first famous candidate debates were the Lincoln-Douglas debates of 1858, when Abraham Lincoln and Stephen Douglas campaigned for the U.S. Senate in Illinois. Starting in the 1830s, abolitionists, and later, suffragists and temperance advocates, held public addresses to raise support and funds for their causes. Today, there are a variety of political events at the local, state, national, and international level as noted in Table 1.

Political Event Planning

Political event planning differs from traditional event planning in a variety of ways. For the purposes of this analysis, we will differentiate between ceremonial events with officeholders and campaign events featuring office seekers (including incumbents). Ceremonial events such as state dinners will be arranged by a protocol office and have the luxury of time and probably a generous budget. Even candidate fundraisers can be scheduled far in advance and planned carefully.

By contrast, a political campaign event may be pulled together in the space of days. Details, such as start time, format, guest speakers, venue, tickets, security procedures and more may change up until the last minute. Moreover, there is no guarantee that they will even be

held. Events may be cancelled due to the candidate's illness, a change in strategy, or urgent public business that calls a candidate away without notice. However, there are some important similarities. A political event planner needs to estimate attendance, arrange for staging and sound, plan decorations, arrange catering, ensure adequate parking and disability access, and provide signage.

Parking: One of the first concerns for a political event is parking. Political event planners need to think about parking in multiple ways. First, there needs to be adequate, unobstructed parking for the candidate(s) and accompanying security. This is especially true for the Secret Service (see below). Second, there needs to be adequate and appropriate space to accommodate the news media, especially satellite trucks (also see below). Third, there needs to be ample parking, or shuttles for people with disabilities and VIPs. Finally, there needs to be sufficient and easily located parking for the public. If the venue does not have enough nearby parking, then the event planner needs to provide shuttles.

Credentialing: Individuals who are working an event, either as event planning staff, reporters, campaign aids, security, food service, volunteers and the like should be identifiable by uniform and/or visible credentials. This helps prevent gatecrashers yet ensures that all those who should have access to a venue are able to get in.

Security: A political event may have very different security needs, depending on the nature of the event and who is attending. A forum featuring local school board candidates may require no security procedures at all. A Governor or other statewide official may bring his/her own security detail. A presidential candidate or surrogate may have Secret Service protection. While most security personnel will want to tour a venue in advance or see blueprints and want to secure entrances or set up metal detectors, Secret Service protection brings a new level of complexity. First, the Secret Service will trace a route into the venue from either the previous event or the local airport. Second, the Secret Service "sweeps" or searches a building in advance for security risks and then removes them. Third, the Secret Service often requires attendees to pass through metal detectors and to have bags searched. Fourth, the Secret Service requires an ambulance on site, parked in a lot reserved for the emergency personnel only for quick access. Fifth, the Secret Service may post agents at windows or roof tops to

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Table 1

Types of Political Events

Dimension	Types	Examples
International	Foreign policy summits, treaty signing ceremonies, state dinners, mid-level preparatory negotiations, specialized conferences, historical observances, state funerals	World Trade Organization events, G-7 or G-20 Meetings, NATO summits
National	Holiday celebrations, military remembrances, oath of office events, presidential addresses, presidential candidate debates	July 4 th community events, Veterans Day or Memorial Day events, Inauguration, Congressional swearing in ceremonies, State of the Union, dedications, Commission on Presidential Debates
State/Local	Oath of office, public meetings, community town halls, holiday celebrations	Gubernatorial Inauguration, swearing in ceremonies, state of the state (city) addresses, parades, ceremonies, addresses
Political Parties	Conventions (national, state, local), rallies, parades, fundraising events, media events, debates, forums	Democratic National Convention, Republican National Convention, state party conventions, state caucuses
Non-Partisan Events	Nonpartisan voter registration events, nonpartisan community debates and forums	League of Women Voters education events

provide additional protection. Finally, the Secret Service may request the names and social security numbers of anyone who will be in close proximity to the candidates or officials they are protecting. They use this information to run background checks. This might include those who will share a stage with the person, news media, photographers, or other VIPs. The event planner may be responsible for collecting this information several days in advance.

Staging and Format: For some events, such as nationally televised events, networks will take over stage design, construction, and lighting. In smaller-scale events, the event planner may have this responsibility. This involves securing a raised stage, so audience members can easily see the speakers; a nondescript backdrop such as a step-and-repeat or pipe-and-drape; microphones; water; and podium(s), table(s), and chairs.

In multi-candidate forums or debates, this task may fall to the event planner or hosting organization. In any case, the candidates need to be treated equitably. Whenever possible, the chairs, podiums, water, microphones, should be identical. However, the event planners need to be aware of the limitations to a “one size fits all approach.” For example, requiring candidates to stand behind standard-sized podiums might be problematic for candidates who are very short or who have physical conditions that prohibit standing for long periods of time. Tall stools might also be challenging to mount and sit in comfortably. Wheelchair users need ramps.

Candidates and perhaps the moderator may also require green rooms to relax, greet supporters, confer with staff, and freshen up before the event. Candidates with Secret Service protection will require a green room with access to the venue that is shielded from the public.

Likewise, the political event planner may also need to plan the format for the event. In single-person appearances, this is fairly straightforward, involving a welcome, someone to introduce the keynote speaker, and a means to handle questions, if they are allowed. Multi-candidate forums or debates are more complicated. The event should be moderated by someone who has experience with the time limits and rules clearly articulated and enforced. Again, every effort should be made to treat candidates equally.

Press: Political events also involve working with the news media to a degree that other events may not. Event planners need to notify the news media and have a system of credentialing in place. Reporters also want access to the venue well before the event starts.

Reporters need some furnishings and equipment in order to ensure high-quality video and timely filing. Print reporters should have small tables to use their laptops and a strong wi-fi signal for uploading stories. Television camera operators require risers, so they have an unobstructed view of the stage. At times, the media space is at the front of the audience, which ensures a clean camera shot but either obstructs the audience’s view or reduces the space for the public.

Television and radio reporters also like to use a “mult box,” which allows the cameras to connect directly into the venue’s sound system. This eliminates background noise when recording the speakers. Reporters of any ilk will want to know whether there is time to interview the principals before or after the event. Often venues will include a “spin room” for candidates or their staff to meet with the media. In other cases, there is a space on the side of the room for brief interviews.

National networks use satellite trucks to send their stories to the network office or to do live shots. Satellite trucks require an open space for the dishes, so tree-lined streets or parking lots are out. They also need to be proximate to the venue for the convenience of the reporters. This can eliminate prime parking spaces for VIPs or candidates.

Scheduling at the last minute: One rule of political campaign events is that anything can change by the day or minute. Campaigns may contact a venue just days before an event, or change the time or date, or cancel, up to the last minute. Another near constant is that candidates run late. Sometimes really late. These realities mean that event planners must be flexible and plan for the worst. Having surrogates or other candidates speak or live entertainment can help pass when a candidate runs late.

Outreach/Building Hype: Political events can be publicized in much the same way as any other major public event – with news releases, social media promotion, and paid advertising. The difference is that any information needs to be vetted by the campaign or public official’s office. The messaging is likely to go out from multiple sources (campaign, political party, venue, host organization, media partner), so all the stakeholders need to negotiate the message and the timing of the release to minimize confusion.

The Iowa Caucuses

Iowa has enjoyed a unique status in the United States since 1972 when the Democratic Party decided to change its presidential nomination system to make the process more open to voters. In 1972, Iowa was the first state to host its Democratic caucus, unintentionally leapfrogging New Hampshire; the Republican caucus was first held in Iowa in 1976. The Iowa caucus differs from a primary election in that citizens of Iowa come together at a specific day and time in public venues such as schools, libraries, and churches to discuss the candidates. In the Democrats’ case, this involves a public statement of support by physically gathering with like-minded caucus-goers known as an “alignment.” Republican caucus employs a direct vote. For both parties, registered voters allocate delegates to the county conventions.

Since Iowa is first in the nation to select the presidential nomination, candidates spend a great deal of time campaigning there in the months leading up to the caucus. Presidential candidates often embrace “retail politics,” a form of personal connection with voters (Vavreck, Spillotes, & Fowler, 2002) to interact with voters. In Iowa, candidates often engage in

retail politics, such as visits to the Iowa State Fair to participate in a Political Soapbox (Crowder, 2019). The economic impact of the Iowa Caucus is extremely strong. Catch Des Moines, the Convention and Visitor Bureau of Des Moines, estimated a \$11.3 million economic impact to Des Moines, the largest city in Iowa, in the week before the 2020 Caucus and \$228 million in advertising value equivalency (Catch Des Moines, 2019). In recent years, political tourism has also emerged as a new form of tourism to Iowa, where out of state visitors visit Iowa for the chance to see and interact with political candidates (Rodriquez, 2019).

The 2020 Iowa Caucus

The 2020 Iowa Caucus occurred on Monday, February 3, 2020 at 7pm Central Standard Time. Results of the Democratic caucus were significantly delayed due to a new reporting app that was used in the precincts, new changes to reporting of results, and a failure of a backup phone number to call in results and new reporting procedures/processes. An app created by Shadow Inc., a startup tech firm, was contracted by the Iowa Democratic Party to report caucus results (Kim, 2020).

The app was used for reporting the totals, and the app was found to have coding errors that caused some incomplete results and calculations. The app was criticized by many for not being user-friendly and for security concerns, since the app was downloaded onto personal smartphones of precedent captains. Additionally, party leaders did not disclose the name of the app, the company that created the app, and how the app was built were not announced before the Caucus (Payne & Parks, 2020). The app was created to assist with the reporting was created hastily in a few months and was not tested on a statewide scale (Corasaniti, Frenkel, & Perioth, 2020). Numerous county chairs throughout the state reported having challenges in using the app and reported challenges with the app hours before the caucus was to begin. A coding error found before use of the app suggested the app had not been fully tested (Popken & Barrett, 2020). The Iowa Democratic Party blamed inconsistencies with the reporting results in releasing results on Monday evening.

Payment involving services of political events remains tricky. Often, event venues and providers will not bill a political party because they are non-profit organizations and failure to pay in accordance with a contract may elicit a write-off of the account and can place the vendor violating campaign finance laws. Records show that the Iowa Democrats paid the firm \$63,183 in two installments (Rosenberg et al., 2020). Several political campaigns and state committees also paid the firm for software rights, marketing services, and subscription-based services (Kim, 2020).

Furthermore, for the 2020 Iowa Democratic Caucus, several changes occurred to the Democratic Caucus process through complex rules when awarding delegates. In an effort to increase transparency, Iowa Democratic Party was planning to release three sets of numbers: the raw count from the first alignment, the raw count from the 2nd alignment,

and the state delegates allocated (Pfannenstiel, 2020). In 2020, the Caucus occurred over two rounds' alignments. For the first round of voting, each candidate must have a threshold of 15% of the caucus attendees to receive delegates. Caucus-goers who aligned with a candidate whose support did not reach this threshold were able to realign with another candidate. Errors in rounding and miscalculations are often easy to make as the "Caucus Math" is often done on paper with a coalition of volunteers. Furthermore, a report by The New York Times found numerous inconsistencies in reporting of results (Collins, Lu, & Smart, 2020).

By late evening on Monday, the Iowa Democratic Party was in crisis mode. Although the local caucuses ran smoothly, reporting from the event became a challenge for the party organizers. The impact of the failure of the app and the results were not known during the actual Caucus until a few hours after the Caucuses ended. Communication between the various Caucus sites and the headquarters was challenged as a hotline became overwhelmed. When county chairs attempted to phone in results, as a contingency plan, they were often faced with delays with the phone hotline. Some precinct captains ended up driving the results to the party headquarters; others waited until Tuesday to phone in their results.

Fueled by media speculation, it became clear that the Iowa Democratic Party was dealing with a significant challenge. A brief press release was released late Monday evening stating delayed results were due to inconsistent reporting. A press event occurred the next day in the afternoon and partial results were released at that time. Completed results were not released until three days after the Iowa caucus event. Because of the problems and the confused reporting, the Associated Press (2020) declined to name a winner of the 2020 Iowa Democratic Caucus.

A recent post mortem concludes that the vestiges of the caucus's history as simple, informal gathering that depended upon volunteers were simply outmatched by the international media scrutiny and the pressures imposed by the campaigns, the media, and the Democratic National Committee for immediate and accurate results (Pfannenstiel 2020). From an event planning perspective, the Iowa Democratic Party failed to adequately test technology before using it in a sprawling, complex event. Second, the Iowa Democratic Party did not have a "Plan B" in case the app failed to work as promised. The party should have installed enough phone lines and volunteers to handle the calls from precinct chairs. Third, the Iowa Democratic Party staff and leadership should not have sequestered itself with visiting dignitaries without adequately staffing the volunteer call room. Thus, the leadership was unaware of the problems as they steadily grew during the evening. Finally, the party leadership waited far too long to disclose the problems they were experiencing to the campaigns or the news media, which led to frustrated campaign officials; a gaping, news

vacuum filled with stories about delay and incompetence; and embarrassment for party leaders alike.

Literature Review

Political Science as a discipline has its roots in the political philosophy of Ancient Greece. In its modern incarnation, Political Science studies the nature of power and democratic institutions, including the study of campaigns and elections in American and worldwide contexts. Event studies is a recent multi-disciplinary field that consists of event studies (examines planning events and meaning attached to events); event management (an applied field that examines the management of planned events); and event tourism (examine the strategic use of events in a destination) (Getz & Page, 2016).

As events continue to use technology to facilitate physical events, a few theories have been used to explain how people adopt and use technology. For example, the technology acceptance model (TAM) is the most prominent model to explain how people use technology and is based on the theory of reasoned action (Fishbein & Ajzen, 1975). TAM posits a user's perceived usefulness of technology and perceived ease of use of technology to explain a person's attitude and behavioral intention to using the technology (Davis, 1989). A few studies from the event management technology literature have applied TAM to event studies. For example, Talantis, Shin, and Severt (2020) found perceived usefulness was the greatest predictor of the attitude toward a mobile event app and attitude was a predictor toward satisfaction with a conference.

Case Study Discussion

The major questions in this case study are:

1. How does the political event planning process differ from traditional event planning?
2. What are the key characteristics of a successful political event?
3. What were the key challenges with the 2020 Iowa Democratic Caucus?
4. What role does technology have in the reporting of the results?
5. How can training be used to better educate political event volunteers?
6. From an event management perspective, what changes should the Iowa Democratic Party make for its next caucus?

Activity

As an event management consultant to the Iowa Democratic Party, you have been asked to submit a proposal to highlight changes to planning and executing the political event of the Iowa caucus. In the proposal, identify specific event management changes, an evaluation of those changes, and final recommendations for improving the political event.

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