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THEY SAID IT

Alice laughed. "There's no use trying," she said. "One can't believe impossible things."

"I daresay you haven't had much practice," said the Queen. "When I was your age, I always did it half an hour a day. Why, sometimes, I've believed as many as six impossible things before breakfast."

Lewis Carol, *Alice's Adventures in Wonderland*, 1865.

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A SCORECARD, OF SORTS.

As you may recall, on Election Eve four years ago, we put out an "election scorecard" in which we offered our predictions for the White House race, the Senate races, and a rough guesstimate on the total number of House seats that would change partisan hands.

You may also recall that our scorecard gainsaid the conventional wisdom, predicting victory (with a popular majority) for President Bush and substantial gains in the Senate for the GOP. In all our predictions, we missed on only a couple of calls, miss-calling one Senate seat and one state (Hawaii, which we thought would go to Bush).

Our success last time around was due in large part to the fact that we knew better than to trust the mainstream press and the mainstream prognosticators, the overwhelming majority of whom were predicting with their hearts rather than their heads. The so-called experts allowed their biases and their preferences to guide their predictions, with predictably disastrous results. While the likes of John Zogby and Charlie Cook were calling the election "Kerry's to lose," we understood that such "predictions" were little more than wishful thinking.

President:

For those of you hoping for a repeat performance this time around, we have good news and bad news. The good news is that the usual suspects are at it again: cherry-picking trend-lines and precedents, over-emphasizing those events and explanations that fortify their preferred outcomes, and generally "predicting" that which they hope with all their hearts will happen. Once again, their biases have informed their forecasts.

The bad news is that this doesn't necessarily mean they will be wrong. In fact, there's every reason to believe that they will be right this time, even if for the wrong reasons.

At this point in the game, nearly every sentient being in politics has called this election for Obama. And it's not hard to see why. He leads in ALL the polls, and in some by a hefty margin. He has been able to throw oodles of cash at the campaign over the last several weeks, while the publicly financed McCain has had to stretch his budget. This is a Democratic year and he is, by the far, the best candidate the Democrats have fielded in twelve years. What's not to get here?

The biggest problem in evaluating this race is that the polls this year are screwy – and that's putting it about as mildly as we can. All fall, the polls have been inconsistent, volatile, and at times completely incomprehensible. Just yesterday morning, for example, the polls and their pollsters made so little sense as to be virtually worthless in evaluating the state of the race.

Yesterday's Zogby poll, which on Saturday became the first poll to show McCain with a lead in one day polling since September, flipped in the opposite direction, showing Obama cruising to victory. This says a great deal more about Zogby than the race, in our opinion, but it's still unusual, to say the least. Meanwhile, GOP strategist Ed Rollins conceded defeat and suggested that the recent tightening in polls was just "Republicans coming home" and nothing of any great significance. At virtually the same time, the *Washington Post/ABC* poll showed late-breaking independents moving toward McCain, and late breaking *Republicans* moving toward *Obama*, which contradicts not just Rollins, but logic as well.

The *WaPo/ABC* poll also showed an absolute majority of men favoring Obama, which is bizarre in its own right, since a majority of men haven't voted for the Democratic candidate since 1964. And if that's an accurate reflection of the state of the race, then Obama would be cruising to a Johnson-esque landslide. Of course, just to make matters more

confusing, the IBD/TIPP poll, which was the most accurate poll in 2004, showed the race closing and McCain down only two percentage points (46.7% to 44.6%). And remember, this is all in *just one day*.

Over the past handful of election cycles, one of the most informative sources for polling data has been Real Clear Politics (realclearpolitics.com), which not only compiles the polls daily, but averages them as well, providing a reasonable, general picture of the overall state of the race and largely mitigating the distortive effects of outlier polls. And while RCP has remained invaluable, the RCP average is less helpful this year than in years past, principally because the number and dimension of the outliers has been disproportionate and has thereby skewed the average of the polls.

This year, several polls – the aforementioned *Washington Post/ABC* poll, The Gallup Poll, the *New York Times/CBS* poll, just to name a few – have attempted to forecast election results using likely voter/turnout models that posit significant, even unprecedented shifts in the party identification in the electorate. In 2004, the electorate was split evenly (37% Democrat, 37% Republican) for the first time since before the New Deal. That changed in 2006, when the Democrats regained their traditional advantage. This handful of pollsters are presuming that party ID will shift even further in the Democrats' direction this year, giving the party its largest advantage since 1964 – larger even than in the two elections in the immediate aftermath of Watergate. Naturally, these polls give a HUGE advantage to Obama and have thereby skewed the RCP average.

Looking at the RCP average, one would assume that this race is over and has been for weeks. And that may be the case. But then again, it may not.

What this all boils down to is the composition of the electorate on Election Day. If the ever-pursued, ever-disappointing youth vote manages to get out of bed early enough to show up; if the newly registered non-traditional voters can be bothered to show up; if, in short, people who don't usually show up can be made to show up, then Obama will win in a landslide.

The problem with expectations of such turnout is that they are based less on reason and experiences and more on hope, fittingly enough. More to the point, early and absentee voting patterns thus far suggest that the electorate in this election will be much like the electorate in other recent elections and that the youth vote will, once again, disappoint.

Does this mean that these non-traditional voters (or traditional non-voters, if you prefer) will stay home tomorrow and that we can therefore eliminate the possibility of a landslide? Unfortunately, no. As Jon Cohen, the director of polling for *The Washington Post* put it over the weekend:

Simply put, we may be wrong about who is likely to vote on Tuesday. One of the trickiest parts of political polling is determining which of the people interviewed in pre-election surveys will really vote. It's relatively easy for us to identify such sharply delineated groups as the population of all adults living in the United States or even all registered voters, but the pool of actual voters is a group that exists at a single point in time, on Election Day....

Even a few days away from an election, that group remains an unknown population.

The other, more reliable polls which use more traditional likely-voter models and expect the Democratic advantage to be relatively modest, though nonetheless significant (e.g. Radmussen, TIPP, Pew, Battleground), all showed notable tightening into and over the weekend. That momentum, however, stalled today. Even the most reliable and cautious polls show that Senator Obama maintains a slim, but statistically significant lead.

The polls may be wrong, of course. And as we have noted, there is ample reason to distrust their stability, if not their veracity. That said, the implications of today's polls are not heartening for McCain supporters. While it is not entirely unreasonable to expect that McCain might pull it out tomorrow, putting money on such an outcome would be a decided gamble.

Throughout the primary season, Obama over-pollled and underperformed, meaning that his actual vote total was almost always markedly less than pre-election polls indicated it would be. Given this, a 2, 3, or 4 point Obama lead heading into Election Day might reasonably be called a dead heat. Add in the fact that Ohio and Pennsylvania appear to be in play, at least judging by the candidates' travel schedules and the pleadings of their surrogates, and it is not difficult to craft a hypothetical situation in which McCain would win.

And we would love to craft such a scenario for you. In good conscience, however, we don't believe we can. In short, we can't shake the feeling that if we boldly forecast a come-from-behind McCain victory, we will be committing the same grievous error as the prognosticators whom we ridiculed in this piece's introduction, i.e. predicting with our hearts, not our heads. What we can and will say, though, is that a McCain win would, at this point, be unsurprising. It might be unexpected and perhaps a little counterintuitive. But it is hardly outside of the realm of possibilities.

But then, an Obama landslide is hardly outside of the realm of possibilities either. If the Gallup-*WaPo*-ABC-NYT-CBS folks have, in fact, identified a heretofore unknown and unprecedented Democratic surge, then Obama wins in a walk. We hate to do this and hate to sound so trite, but the results tomorrow really will depend on who shows up, on the ultimate composition of the electorate.

Our suspicion is that Obama's votes will, in fact, materialize. Maybe not all of them, but enough of them to put him over the top. We'd love to be wrong and hope that we will be, but, obviously, don't expect to be.

The Senate:

As you well know, the presidential election is not the only election that is taking place tomorrow. As is the case every two years, one-third of the Senate is up as well, and this year, Democrats are expecting substantial gains. Most pollsters and prognosticators

agree that the Democrats will do very well, the only question being “how well?” As things stand today, the Senate is narrowly divided (51-49, counting nominal Independent Lieberman as a Democrat). The Democrats have long hoped and the Republicans have long feared that this election would bring huge gains, giving the Democrats 60 seats and thus a filibuster-proof majority.

Mercifully, in our humble opinion, that’s not going to happen. In order for the Democrats to pick up 60 seats, they would need to win every close or contested race. And they won’t do that, meaning that the Republicans will, no matter the outcome of the presidential contest, maintain a very thin shred of purely reactionary power.

Democratic Pick-ups:

Virginia: Former Governor Mark Warner will coast into the seat currently held by nominal Republican John Warner. The good news is that in so doing, Mark Warner will crush his own presidential aspirations.

Colorado and New Mexico: The Udall Boys (cousins Mark and Tom) are poised to pick up the seats being vacated by Republicans Wayne Allard and Pete Domenici, respectively. The desert Southwest continues to grow more and more purple, to the point of becoming almost blue. If Republicans ever want to regain power, the Southwest is where they’ll have to start.

North Carolina: North Carolina is quickly becoming one of our favorite electoral states. For more than three decades now, the Senate Seat currently held by Republican Richard Burr has been occupied exclusively by one-term Senators (John Edwards, Lauch Faircloth, Terry Sanford, Jim Broyhill/John East, Robert Burren Morgan). The people of North Carolina, by contrast to the rest of the nation, apparently have no problem throwing the proverbial bums out. And this year, they appear poised to do this with their other Senate seat as well, the seat occupied forever by Jesse Helms and currently occupied by Elizabeth Dole. Dole is likely going to lose after only one term to Kay Hagan. And that’s fine by us. Dole

has been a major disappointment in office. This race will be close, but the Democratic tide should help Hagan.

Alaska: The current incumbent and Republican nominee is recently convicted crook Ted Stevens. Need we say more?

Oregon: Republican incumbent Gordon Smith trails in his re-election bid against Jeff Merkely. Like the Southwest, the Northwest is increasingly hostile territory for Republicans.

Republican Holds:

Minnesota: A couple of weeks ago, it looked as if “comedian” Al Franken would unseat Republican incumbent Norm Coleman. Fortunately, it looks increasingly as if there are some celebrities whom even Minnesotans won’t elect. The foul-mouthed, ill-tempered, occasionally violent Franken is his own worst enemy. Minnesotans likely would have voted for a Democrat (Democrat, Farm, and Laborer, technically) but just not this one.

Georgia: Republican incumbent Saxby Chambliss has been the number one target for ideological Democrats since 2002, when he defeated then-incumbent Max Cleland, whom the left claimed was slandered by his opponent. The myth of Cleland’s slandering has always been greatly exaggerated, and so, in our opinion, is the likelihood of Chambliss falling prey to revenge.

Kentucky: Democrats have also targeted Senate Minority Leader Mitch McConnell for defeat, and have managed to make this contest far closer than anyone in the GOP would have liked. We expect McConnell to hang on, however, and return to Washington to continue embarrassing his Democratic counterpart, Majority Leader Harry Reid.

Republican Pick-ups:

Nebraska: We don’t know how to “write” the sound of crickets chirping, so we thought we’d stretch a little to bring a little sunshine to an otherwise exceptionally

bleak GOP day. The current incumbent Chuck Hagel is retiring. And though Hagel is technically a Republican, most Republicans wish he weren't. He almost certainly will be replaced by former Lincoln Mayor, Nebraska Governor, and Secretary of Agriculture Mike Johanns, who will put this seat back firmly in the GOP column.

Final Score: Democrats +6, 58-42.

The House of Representatives:

We won't bore you with a 435-member list of projected winners and losers. We will simply say that the Democrats appear poised to expand their majority and to do so by more than a handful of seats. Why anyone in their right mind would want to give more power to the least competent, least likeable, least able, and most ideological Speaker of the House in recent memory, we can't say. But that's what voters are likely to do. All politics may be local, but, in this case, the national implications are just abysmal.

The silver lining in the House, you ask? Well, there are two. Unfortunately, one of them would have to be part of an Obama victory. We don't want to get into it in too much today, but we will follow up on this point in our post-election piece, should Obama win. Unless/Until then, it should suffice to say that in our opinion, the House will – two years from now – once again, be the source of Republican revival. So at least there's that.

And for those of you conservatives feeling surly about the otherwise depressing results, take heart in Pennsylvania's 12th Congressional District. Congressman Jack Murtha – best know as the jackass who screamed and hollered for the heads of the Marines involved in the incident in Haditha in which several civilians were (accidentally) killed and who has thus far failed to apologize for his slander, despite the Marines' acquittal – is locked in a very tight race and will, we believe lose. Murtha, of course, is a close ally of Speaker of House Nancy Pelosi and recently made headlines by calling his own constituents racists, not once but twice. We believe in cosmic justice, and this time, Murtha will be its target.

So buck up, little campers.

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