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## Innovation, Infrastructure, and Organization in New Media Campaigning

On February 10, 2007, Barack Obama's presidential exploratory committee posted a video of the candidate on BarackObama.com. In it, Obama declared that he was formally entering the race for the presidency and that "tomorrow, we begin a great journey. A journey to take our country back." Obama echoed Howard Dean's announcement speech nearly four years earlier, on June 23, 2003, in which the former Vermont governor declared that "we stand today in common purpose to take our country back." Obama, of course, ascended to the presidency—an achievement of which Dean had only dreamed.

More than rhetoric links the campaigns of the two men. Dean's run came up short, but the insurgent, outsider candidate was stunningly successful at mobilizing his supporters. While ultimately short-lived, Dean's success was in large part due to the campaign's embrace of the Internet. The Dean campaign took up an extraordinary array of tools to spur supporters to action and to coordinate their efforts. The campaign was the first to routinely and systematically use e-mail for fund-raising and to deploy a blog to gather supporters. The campaign was also a remarkable site of technical innovation, as staffers and volunteers modified existing technologies to meet their needs and built entirely new tools, including an early social networking application that enabled supporters to find one another and thus coordinate their electoral efforts. The campaign's organizational innovations were as important as its technical work. Dean's staffers crafted new and effective practices for mobilizing and coordinating the efforts of supporters online. As a result of this work, the campaign set records for fund-raising, drew tens of thousands of supporters to events, and moved thousands of volunteers to contact voters months in advance of the Iowa caucuses.

With these tools in hand, and with the knowledge and skills gained over the course of an election cycle, a new generation of political staffers and consultancies

specializing in new media campaigning emerged from the ashes of Dean for America and helped rebuild the infrastructure of the Democratic Party. Through these staffers and firms, the tools and practices for online campaigning, first honed during Dean's run, spread across Democratic politics. One of these firms, Blue State Digital (BSD), played a particularly important role in rebuilding the party's technical infrastructure after John Kerry's devastating defeat.<sup>1</sup> Jascha Franklin-Hodge, Clay Johnson, Joe Rospars, and Ben Self, four young veterans of the Dean effort who got their start in politics during that campaign, launched BSD soon after the candidate withdrew from the race. It was a time when the phones of Dean's Internet staffers rang with opportunities, despite their candidate's collapse. The four found their services in high demand, and quickly built their business of providing tools and strategy for online campaigning. In the process, they contributed to a number of Democratic electoral victories. Among dozens of campaign clients, the firm's founders provided the technology and online strategy for Dean's political action committee Democracy for America and contributed to the effort to get Dean elected party chair. Soon after, working for the new chairman, they rebuilt the party's technological systems, implemented a new online campaign platform, and led the effort to create a national voter file and database system.

The morphing of Dean for America into Obama for America was more than a metaphor for a style of politics. Through their work between the 2004 and 2008 presidential elections, BSD's founders refined the technologies and organizing practices first crafted during the Dean campaign and made them more powerful. They then applied their tools and skills to the 2008 Obama campaign. BSD provided the campaign's electoral platform, and Rospars served as its new media director. (Rospars later became the chief digital strategist for the president's reelection campaign.) The 2008 Obama campaign's tools and new media strategy were not responsible for the extraordinary mobilization around the candidate. Tools and organization translated the efforts of millions—mobilized by Obama's charisma, rhetoric, and the political opportunity to elect a Democrat and African American to the presidency—into the concrete electoral resources that formed the mantra for the campaign's New Media Division: “money, message, and mobilization.”<sup>2</sup> Michael Slaby, the 2008 campaign's chief technology officer and the 2012 campaign's chief integration and innovation officer, relates, “We didn't have to generate desire very often. We had to capture and empower interest and desire. . . . We made intelligent decisions that kept it growing but I don't think anybody can really claim we started something.”<sup>3</sup>

As this collective outpouring took shape, the campaign had much of the staff, practice, and tools in place to convene and harness it for electoral ends. As they did so, new media staffers helped the campaign build a massive electoral operation that rivaled the partisan mobilization during the era of strong party politics

more than a century ago.<sup>4</sup> Supporters across the country used online calling tools to make over 30 million phone calls to voters in battleground states.<sup>5</sup> Millions made small donations online and donned Obama merchandise purchased through the campaign's online store. Over 2 million citizens created accounts on the campaign's electoral platform, *My.BarackObama.com*, where they used tools to independently host tens of thousands of volunteer and fund-raising events for Obama and set up over 35,000 geographic- and affinity-based groups of supporters. The campaign, through e-mail and online advertising, mobilized tens of thousands to drive hundreds of miles to volunteer for the candidate in states stretching from Washington to Florida.

This book reveals the previously untold history of how the individuals and innovations of the Howard Dean campaign came to play a starring role in the effort to elect the nation's first African American president. In doing so, it tells the history of new media and Democratic campaigning over much of the last decade, documenting key moments of electoral innovation, charting the dissemination and evolution of tools and techniques as they moved across politics, and chronicling the organizations that shape the ways in which candidates use new media.

In addition to providing a rich look at the tools and practices that make up contemporary campaigning, this book contributes to scholarly understanding of new media and politics. Over the decades of the Internet's development and popularization, the medium has inspired reams of books and articles that speculate about its effects on the American political process.<sup>6</sup> In recent years, many scholars have turned to a classic body of work on the cost of participating in and organizing collective action to explain phenomena such as the Dean and Obama campaigns.<sup>7</sup> These scholars analyze the effects of "Web 2.0 information environments" on political organization and citizen participation.<sup>8</sup> Scholars argue that networked digital media dramatically lower the cost of producing and disseminating political information and enable new forms of large-scale, networked collective action to occur entirely independently of formal organizations.<sup>9</sup> Meanwhile, scholars argue that through their use of new media, resource-poor campaigns and political organizations have new opportunities to engage in strategic communications and to organize collective action, ultimately extending their ability to influence the political process.<sup>10</sup>

Despite this large body of work and the insights that it offers, we lack answers to some important questions about new media and politics, which frame this book. If, as many accounts of new media and politics suggest, technologies are "out there" for campaigns to use as needed, why was the Dean campaign the site of the campaign innovations that many document?<sup>11</sup> How did the social and technical innovations of the campaign spread to other sites in politics so that by 2006 Democratic campaigns routinely deployed many of the same tactics and

tools used by Dean? What explains the enormous growth in online fund-raising and voluntarism between 2004 and 2008, and why was the Obama campaign the widely regarded leader in using new media during the presidential cycle?

In answering these questions, this book explores three central themes that are largely absent from accounts of new media and politics: *innovation*, *infrastructure*, and *organization*. A central claim of this book is that information environments do not simply emerge and change on their own through an inherent technological logic. Information environments are actively made by people, organizations, and the tools they create and wield. The most taken-for-granted forms of online electoral collective action, such as donating money and contacting voters, are premised upon years of technical development, infrastructure building, and knowledge creation, as well as enormous investments of financial and human resources.<sup>12</sup> Strategic political actors draw on these social and technical resources to create the work and communication practices and organizational processes that shape and support online collective action. As such, this book argues that much of the scholarly literature in the electoral domain has the wrong object in view in focusing on the outcomes of this work, rather than the processes that create information environments.<sup>13</sup>

In the following pages of this chapter, I discuss the importance of looking at innovation, infrastructure, and organization to understand the form of networked politics. I use the idea of “networked politics” in a dual sense. On one level, networked politics refers to electoral activities that take shape through the technical infrastructure of interlinked computer networks. On another, I refer to networked politics as a mode of organizing electoral participation. Networked politics involves sustained and coordinated collective action that occurs outside of direct managerial relationships and is premised on the voluntary contributions of supporters.<sup>14</sup> I map my exploration of the concepts of innovation, infrastructure, and organization chronologically onto the history that this book will present in the following chapters. This chapter then discusses the import of the history here for evaluating networked politics in democratic terms, and concludes by providing a brief discussion of my methods and an overview of subsequent chapters.

## Technical and Organizational Innovation on the Dean Campaign

In early 2002, Howard Dean, then in his sixth term as governor of Vermont, took his first exploratory steps toward running for the presidential nomination. The decidedly second-tier candidate began to attract attention during the summer and fall for his opposition to the Iraq War authorization, which passed Congress in October with the support of the leading Democratic presidential candidates

Kerry and John Edwards. Disaffected Democratic activists, frustrated with their party's capitulations to Republicans, began to promote Dean's candidacy online, even though the caucuses and primaries were still a year and a half away. In the winter of 2002, Jerome Armstrong, the founder of the blog MyDD (which then stood for "My Due Diligence"), coined and subsequently popularized the term "netroots" (a portmanteau of "Internet" and "grassroots") to refer to these online supporters of Dean's candidacy.<sup>15</sup> By early 2003, a network of blogs, including MyDD, Daily Kos, and the independent, supporter-run Howard Dean 2004, were routinely delivering funds and volunteers to the campaign, becoming the candidate's *de facto* web presence. These blogs also began encouraging supporters to use a new tool called Meetup, a commercial application that facilitated offline gatherings.

These independent efforts by supporters working on behalf of Dean are the key to understanding the innovations of the campaign, defined in terms of staffers taking up new media tools, creating new ones, and crafting new organizing practices around them. In January 2003, Joe Trippi, who was then consulting for the campaign, in consultation with Armstrong and Markos Moulitsas Zúniga, the founder of Daily Kos, worked out a strategy to convene these online efforts so as to be better able to coordinate them. In Trippi's eyes, the Internet offered the potential to solve the key problem of the Dean campaign. Dean lacked the financial and volunteer resources that candidates such as Kerry and Edwards commanded through strong institutional party and national advocacy group support, given their careers in the Senate.

To coordinate the efforts of the growing numbers of supporters gathering around blogs and on Meetup, Trippi created an autonomous Internet Department on the campaign after he became Dean's campaign manager in April 2003. Trippi then tasked these staffers with developing the tools and practices that would convene supporters and direct their energies toward the fund-raising and volunteering that the campaign needed to make Dean a viable candidate. One of the campaign's innovations lay in this decision to make the Internet a central organizational tool and an explicit part of the candidate's electoral strategy.

Previous campaigns offered models for using the Internet to gain electoral resources, although they were largely experimental. During the 2000 primaries, Bill Bradley and John McCain demonstrated the potential of small-dollar online fund-raising.<sup>16</sup> McCain raised record amounts of money online after his New Hampshire primary victory over George W. Bush.<sup>17</sup> During that electoral cycle, political staffers also began to recognize for the first time that the primary users of candidate websites were supporters, not undecided voters seeking detailed policy statements.<sup>18</sup> To take advantage of this, campaigns began encouraging supporter participation instead of just presenting "brochureware" designed to persuade those who sought out information on the candidate.<sup>19</sup> For example,

campaigns began using the Internet to involve supporters in actions such as promoting the candidate's visibility. To do so, campaigns provided printable literature and signs for supporters to distribute in their communities, as well as tips for contacting local news outlets to promote the candidate.<sup>20</sup>

In 2000, candidates also increasingly used the Internet to fashion supporters into the conduits of strategic communications and to foster engagement around the campaign. On one level, campaigns sought to take advantage of existing social networks to create a new "digital two-step flow" of political communication.<sup>21</sup> Al Gore's campaign, for instance, enabled supporters to create their own customized webpages based on template policy content so that they could present them to their friends and family. On another, campaigns designed spaces where supporters could create new networks for political engagement. Gore's campaign, for example, provided discussion spaces for supporters in the hopes that they would build relationships with one another, create feelings of social attachment and solidarity in the face of attacks by rivals, and ultimately motivate each other for fund-raising and volunteering during a long campaign season.

There was little carryover in Internet staff between the 2000 and 2004 election cycles, however, and little in the way of a developed industry providing online services to campaigns outside of strategic communications and voter targeting.<sup>22</sup> In part, this was because, at the time, campaigns generally devoted few resources to Internet operations.<sup>23</sup> Nicco Mele, Dean's webmaster who had worked for a number of Democratic advocacy organizations, including Common Cause, and had set up the video streams for the online "Shadow Conventions" in 2000, describes the state of online campaigning when he joined Dean in 2003:

When I went to work for Howard Dean I don't think the Internet was taken very seriously as a tool. . . . It was at best an afterthought and it certainly was never a product of any campaign manager's explicit strategy. It was something like "I guess we have to do that." If you were a hot shot political operative you did not go into the Internet side of the business. It was a backwater in politics.<sup>24</sup>

As a consequence, there was little in the way of best practices for online campaigning or dedicated tools for campaigns up through the 2004 cycle, such as robust customer relations management (CRM) platforms that could handle the scale of a presidential campaign.

Although Dean's staffers looked to what came before in 2000, the 2004 cycle also unfolded in a different sociotechnical context that presented new opportunities and challenges for campaigns.<sup>25</sup> Despite the eventual bust, the "dot.com boom" helped more Americans use the Internet and become familiar with things such as online credit card transactions. Communications technologies such as



blogs, while not new, had growing user bases and public visibility. There were also a host of new commercial online applications, such as Meetup and the early social networking platform Friendster, that did not exist in previous electoral cycles.

The Dean campaign took shape in, but was not determined by, this socio-technical context. While much of the scholarly literature on new media and politics generally views technological change as something that happens *to* campaigns, the Dean campaign was a significant organizational and technical achievement. Staffers appropriated existing and created new tools and practices to forge a new mode of online campaigning. The title of this book refers to the active “crafting” of the Dean, and later Obama, campaigns. Staffers of each effort actively labored to construct the technologies and practices that would help them achieve their electoral goals. Unlike the finance and communications professionals on the Dean campaign who had access to developed best practices and ready-to-hand tools for managing and evaluating their work, in 2004 Internet staffers had little to turn to.<sup>26</sup> Indeed, even the legality of much of the campaign’s online volunteerism was not clear, given the absence of Federal Election Commission (FEC) rulings on such things as supporters setting up their own websites for Dean. Internet staffers had to continually consult with the campaign’s lawyers, and even postponed technical projects, to puzzle through what complied with election law.

With the incentive to innovate, and with the organizational autonomy to experiment provided by Trippi, Dean’s staffers assembled their work from a hybrid set of knowledges, practices, and skills in the extraordinarily dynamic and fluid context of a presidential primary run.<sup>27</sup> Attracted to Dean by the candidate’s ideology and promise to reinvigorate Democratic and participatory politics, as well as the technological vision that the campaign encoded, these staffers drew on skills honed in careers and interests outside electoral politics.<sup>28</sup> Many of the campaign’s Internet and technical staffers came from the technology industry, having worked for start-ups that failed with the market downturn. Others came from college campuses, part of a new generation comfortable with taking social and symbolic political action online.

Many individuals with careers outside electoral politics were attracted to the Obama campaign for similar reasons. Even with a New Media Division led by a veteran of Dean’s run, staffers on the Obama campaign came from the leading firms of Silicon Valley, such as Google and Facebook, and helped bring new forms of technical practice to the campaign. Kevin Thurman, an early BSD staffer who also worked for both Tom Vilsack and Hillary Clinton’s presidential campaigns, describes his rival’s campaign: “They did some ingenious things I hadn’t even seen because they built a good team, brought in some people from the outside, from the corporate world. They were doing what Dean also did, drew

talent from outside of politics into the campaign. We [the Clinton campaign] weren't the exciting person, so we were not getting a lot of people."<sup>29</sup>

In a shifting technological context and with skills from outside electoral politics, Dean's staffers incorporated and modified a number of existing tools and built a host of new tools for the campaign. Facing data management and capacity issues as the campaign grew through the independent efforts of supporters, staffers used a customer relations management platform built for the nonprofit sector. When faced with the limitations of the platform, staffers modified it to meet their electoral needs, such as developing a fund-raising application so that supporters could raise money independently of the campaign. Staffers launched the first blog in presidential politics and created entirely new campaign tools that stood as innovations even in the commercial market of the time. These tools included DeanSpace, an open source content management system that enabled supporters to set up their own websites for Dean, and DeanLink, a social networking application modeled on Friendster.

These technologies were only as effective as the practices of online organizing that staffers developed around them, which took shape over time and through much trial and error. As Nicco Mele describes: "In the beginning we were very reactive, we were trying to figure this out on the fly. . . . There were very few tried and true strategies." In contrast, later in the primaries the campaign was "a much tighter operation—it's better run, it's better organized."<sup>30</sup> The campaign's use of e-mail, for instance, was largely reactive until individuals from MoveOn, the online progressive advocacy organization, helped staffers think proactively about their communications. Dean's staffers began to develop goals, to think about narrative, and to use metrics to track the most effective appeals and to better target supporters. In the process, the campaign helped carry MoveOn's innovations in the advocacy sector into electoral politics and developed the genre of the campaign e-mail, with its optimized format of mobilizing content and embedded action links.

As importantly, Dean's staffers created practices to effectively coordinate the work of supporters far outside the campaign's formal boundaries and field campaign. Much of the work of Dean's staffers involved "network building," or the creation, cultivation, and maintenance of ties with supporters that staffers could mobilize for collective social and symbolic action. Networked social action entailed distributed, often project-based actions around fund-raising and voter outreach, conducted by supporters gathering on blogs and Meetup. Networked symbolic action involved the campaign leveraging its relationships with supporters to fashion them into conduits for the campaign's communications, mobilizing them to influence other actors such as the professional press.

Dean's staffers sought to create effective practices for coordinating this action online. In doing so, they faced the dilemma of "under- and overorganizing" that



the organizational sociologist Katherine Chen has described as a feature of voluntaristic organizations in her study of Burning Man, the annual arts and engineering festival in the Nevada desert.<sup>31</sup> As Chen argues, the challenge of voluntarism lies in the need to craft hybrid organizational forms that mix “collectivist and bureaucratic practices, but avoid exercising coercive control.”<sup>32</sup> While organizing mass rallies and canvassing operations have long been a feature of campaigns, the scale and nature of Dean’s online participation resulted in new challenges to striking this balance.<sup>33</sup> In traditional field campaigning, allied intermediaries such as advocacy organizations and unions typically mobilize and manage volunteers who have ties to the organization.<sup>34</sup> Even more, much of field operations is an embodied practice coordinated in physical space, with organized teams of volunteers assigned to precincts with clear chains of command. Despite this, in field operations volunteers and paid part-time staffers often have divergent ideas of how campaigns should be run and varying commitments and goals. Online campaigning significantly compounds this problem. During the Dean campaign, the Internet enabled much more distributed forms of collective action, with supporters organizing independently across the nation and with little connection to local field offices. There were no intermediaries to manage these supporters, given that they directly communicated with the campaign using new media. This resulted in a problem of control. Dean’s staffers needed to work with supporters outside the boundaries of the campaign organization who were gifting their efforts to the campaign, while simultaneously ensuring that their efforts were coordinated towards the campaign’s electoral priorities.

Dean’s staffers developed a host of techniques and tools to guide supporters toward needed actions. One way was to communicate the campaign’s priorities, such as using the blog as a central messaging vehicle and providing detailed agendas for the supporter-organized Meetups. Another was to delegate the task of coordination to technologies themselves through what scholars call the designed “affordances” of the campaign’s applications.<sup>35</sup> The campaign expressly created its online tools with the end of convening and centralizing the independent supporter efforts that were taking shape around the campaign. Through what I call “structured interactivity,” Dean’s applications provided supporters with some ways to participate in the campaign (such as donating money) while not supporting others (such as formally contributing to the campaign’s policy statement on the embrace of open source technologies).<sup>36</sup> In this sense, technologies stood in for a managerial relationship between the campaign and its supporters, setting expectations for volunteer roles and guiding supporter involvement so staffers could garner the money and volunteer labor needed for an effective electoral run.

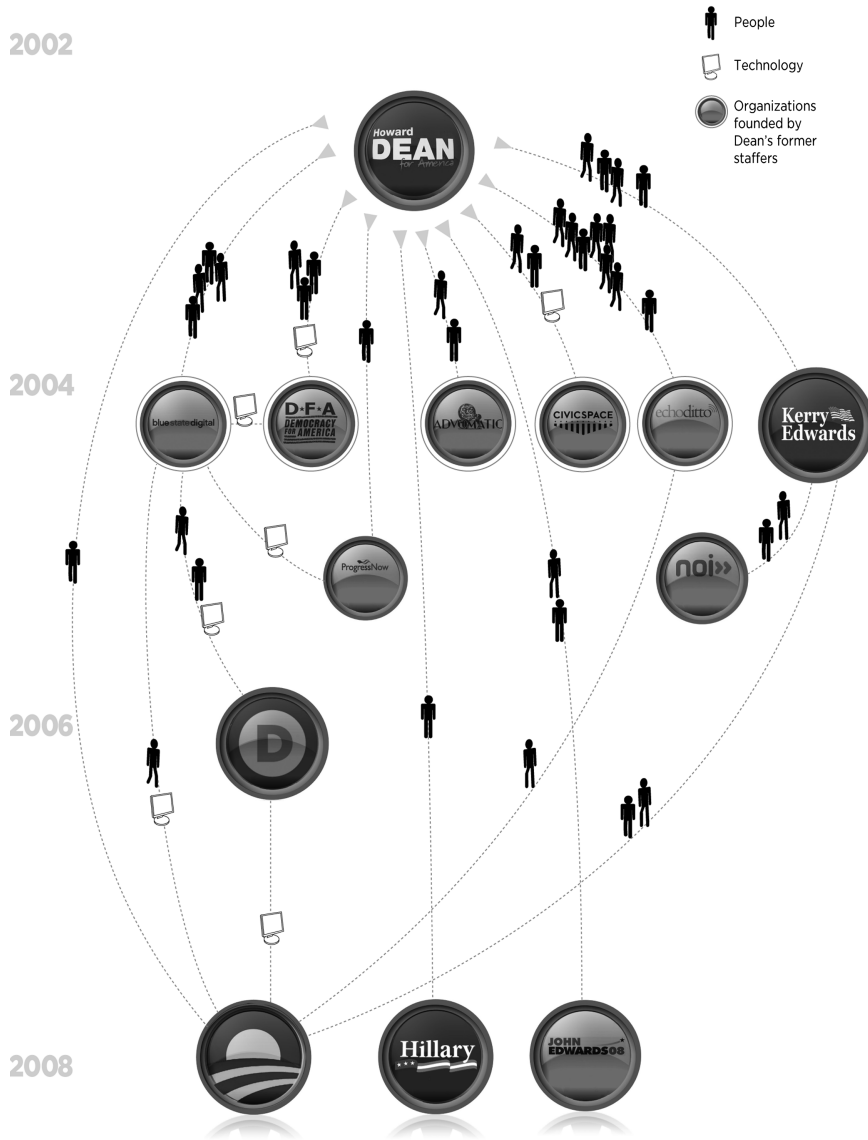
While these innovative tactics proved effective at generating resources for Dean’s run, staffers’ work was ultimately constrained by having to develop these practices and technologies while actively campaigning. As detailed above, the

campaign's Internet operations evolved reactively to the efforts of its online supporters, particularly at the beginning of the campaign. This meant that there was little in the way of comprehensive planning for the staffing and organization of the campaign's Internet operations. This was not ideal from the campaign's standpoint, with staffers working to define their responsibilities, craft goals and effective practices, develop metrics, and create routines for working with supporters while their organizational roles were in flux. Many staffers only stabilized their work well after the summer of 2003. Furthermore, the campaign's leadership could not anticipate, and did not have the resources early in the campaign to address, the rapid scaling of the online mobilization around Dean's candidacy. As a result, the campaign's underlying technical systems were poorly integrated and lacked the capacity that staffers needed. The contribution system was continually strained under the weight of Dean's online donations, staffers had to use multiple logins and passwords to access the campaign's hastily built applications, and there were numerous incompatible databases on the campaign.

Despite staffers' success in developing new tools and in organizing supporters online for massive fund-raising and voter outreach efforts, the campaign ultimately suffered from the lack of a strong field effort in Iowa and a senior leadership that woke to the problem too late and nearly bankrupted the candidate in a last-ditch attempt to salvage a victory through television advertisements. In the wake of a disastrous concession speech, Dean's electoral fortunes were largely finished. However, even as Dean was making his last stand, his staffers were already creating, and were being recruited for, new ventures such as political consultancies that specialized in new media. Through these ventures, Dean's former staffers carried many of the campaign's electoral innovations to other Democratic campaigns and advocacy organizations (see Figure 1.1). In doing so, they helped to create a robust infrastructure for Democratic new media campaigning that included dedicated political tools, codified online organizing practices, and organizations that trained new online campaigners. This meant that when Obama formally announced his run for the presidency, the campaign had staff and tools in place that Dean's staffers could only dream of. As Andrew Bleeker, a veteran of the Kerry, Hillary Clinton, and Obama general election campaigns, describes:

There were no technology platforms out there for political campaigns [in 2004] so we had to develop them all from scratch. 2004 was 100% the bedrock. It not only created the tactics . . . but it built the staff. The firms that came out of 2004 were the firms that built the strategy for '08. . . . Those were the keys. That's what drove most of the strategy and tactics in '08.<sup>37</sup>

**Political Movement:** Circulation of select Dean staffers, consultants, and technologies across political organizations and electoral cycles.



Graphic by: Terence Oliver

Figure 1.1

## Infrastructure for New Media Campaigning

After Dean's defeat, the consultancies and other ventures launched by his former staffers helped to formalize many of the practices and to standardize the tools of online organizing that they had crafted during the campaign.<sup>38</sup> Taken together, these consultancies and the best practices, dedicated tools, and trained staffers that they produced served as an infrastructure for online campaigning that a number of Democratic candidates drew from in 2006 and 2008. As sociologist of information Susan Leigh Star detailed, infrastructure "is both relational and ecological—it means different things to different groups and it is part of the balance of action, tools, and the built environment, inseparable from them. It is also frequently mundane to the point of boredom involving things such as plugs, standards, and bureaucratic forms."<sup>39</sup>

In Star's sense, infrastructure encompasses the technical artifacts, organizational forms, and social practices that provide background contexts for action.<sup>40</sup> Despite its importance, the academic literature on new media and politics has generally overlooked the role of infrastructure in campaigning.<sup>41</sup> There are a number of reasons for this. Infrastructure forms the invisible background context for social action and as such is rarely open to scrutiny. Infrastructure building projects, from developing new technical systems to training online campaigners, occur in the years between elections, when there is little public or scholarly attention to electoral politics. Furthermore, infrastructure is often the mundane work object of the database managers, systems administrators, new media trainers, and consultants who operate in the recesses of parties and consultancies.

Moreover, practitioners themselves seldom talk about infrastructure. There is a deeply rooted value of "self-organization," particularly in the context of narratives about online collective action. The stories that many practitioners tell about their work often portray a world where online collective political action is leaderless, decentralized, and authentically "grassroots," pursued by citizens themselves taking action into their own hands. These stories echo influential popular and academic accounts of new media politics, perhaps best captured in media theorist Clay Shirky's empirical claim for and celebration of "organizing without organizations."<sup>42</sup> There is a deep valuation of seemingly spontaneous collective action. As the social movement scholar Francesca Polletta shows, participants in the civil rights movement described their involvement in collective action for racial equity in terms of a "fever."<sup>43</sup> This story emphasized spontaneous action driven by moral outrage, a powerful account of motivation that helped participants situate their experience while distinguishing their activism from that of an older generation. And yet, even as narratives characterized actions in this way, in actuality they were often the product of meticulous planning. Civil rights organizations such as the NAACP organized many protest actions, and

their members were often participants. A strategy often determined where civil rights actions occurred, and trained organizers coordinated their on-the-ground execution. In this example, culture and organization go hand in hand—one helping to mobilize participants and enabling them to make sense of themselves and their struggle, the other translating that commitment into effective political action.

In a similar way, the stories that new media campaign staffers often tell of their work claim moral authority and reveal a deep valuation of participatory politics, even as they elide the hard work of infrastructure and organization building that goes on behind the scenes. The rhetoric publicly articulated by Dean and Obama, as well as their staffers, situated their campaigns as the products of authentic expressions of political commitment and moral values among citizens. Trippi's embrace of the metaphor of "open source politics" to describe Dean's campaign, and the quote from candidate Obama that graced the banner of BarackObama.com ("I'm asking you to believe not just in my ability to bring about real change in Washington . . . I'm asking you to believe in yours") exemplify both their very real participatory ethos and the rhetoric that these campaigns deployed to mobilize supporters.<sup>44</sup> These public narratives are firmly rooted on the front stage of what cultural sociologist Jeffrey Alexander calls the "performance of politics" in his study of the Obama campaign.<sup>45</sup> This is the discursive space for the articulation of pure civic ideals. Staffers value these narratives in their own right, and they help them situate their own work and justify their faith in their candidate. At the same time, these narratives also offer candidates the rhetorical advantage of framing their campaigns as a social movement.

While this book addresses the role of rhetoric and design as cultural resources that staffers used to craft and make sense of their work and to mobilize supporters, it focuses closely on the myth-defying backstage that consumes much of the working lives of those active in politics. Building infrastructure requires extensive planning and organization, often with an eye to returns that are years away from being realized. Even more, the infrastructural backstage shapes much of the form that politics takes.

After the primaries, Dean's former staffers helped to create the technical systems and organizational practices that provided an infrastructure for subsequent Democratic online campaigning. While a number of Dean's former staffers went to work for Kerry's general election campaign, others launched political consultancies specializing in developing new media tools and strategy for Democratic candidates and advocacy organizations. Among these firms, Blue State Digital was at the center of these infrastructure projects, including the standardization of existing tools and the development of new ones, the creation of best practices, and the training of new online campaign practitioners.

The massive infrastructure projects undertaken by the party once Dean was elected chair in February 2005 reveal these tools, practices, and practitioners.

While in recent years there has been much scholarly attention to the organizational structure of parties, comparatively little work has focused on how they create the basic infrastructure for much of electoral campaign practice.<sup>46</sup> As chair, Dean orchestrated two complex, large-scale, and complementary socio-technical projects: the creation of a national voter file and the implementation of a new online electoral platform called PartyBuilder.<sup>47</sup> Dean hired two of his former staffers, Self and Rospars, to coordinate these projects and to overhaul the ways in which the national party conducted its elections and worked with the state parties and supporters.

As the technology director for the party, Self led the effort to create a national voter file. This proved to be a deeply challenging undertaking that involved both rebuilding the technical infrastructure of the party and negotiating data-sharing agreements with all the state parties. Building this national voter file was a priority for Dean, given widespread failures in state voter files and database technologies during the 2004 general election. Looking ahead to 2008, Dean and Self worked out a deal in which the national party assumed the costs of improving and maintaining the state voter files and building a new database to house them, in exchange for permission to aggregate and access them. Self commissioned the firm Voter Activation Network (VAN) to customize its online interface so that party and campaign staffers could continually access and update the voter file database.<sup>48</sup> The system that resulted is called “VoteBuilder,” which the national party provides free of charge to the states. “VoteBuilder” refers to the Democratic Party’s data (the state voter files as well as commercial data) and the VAN interface system around it. As a key piece of infrastructure for Democratic campaigning, VoteBuilder extended the ability of the party and its candidates to contest elections and to target the electorate. It enabled Democratic candidates for offices from state senate to president to share data across campaigns and election cycles, while ensuring that the voter file was continuously uploaded with quality data. All of the major Democratic presidential candidates’ field campaigns used VoteBuilder in 2008.

As Self worked on the voter file project, Rospars, as the head of a newly reconstituted Internet Department, implemented Blue State Digital’s campaign platform for the party. After Dean’s withdrawal from the primaries, BSD brokered a deal to receive the intellectual property in the campaign’s tools in exchange for integrating, rebuilding, and implementing them for Democracy for America (DFA), the organization that Dean created to sustain the mobilization of supporters around his candidacy and platform. After its work for DFA, BSD adopted what is known in the industry as a “software as a service” (SaaS) licensing model, which enabled the firm’s platform to serve as infrastructure for a number of Democratic political campaigns and advocacy organizations. BSD’s software delivery licensing model works as a partisan version of what economists refer to



as a “club good.”<sup>49</sup> The firm owns the intellectual property in its technologies, yet manages them as a partisan resource to benefit all its paying Democratic clients that invest and commission modifications in the platform.

Through licensing agreements with its clients, the BSD platform became the most powerful in electoral politics and benefited dozens of candidates and advocacy organizations over the years. The platform provides campaigns and advocacy organizations with customer relations management software, database and e-mail services, customizable fund-raising pages for supporters, and social networking, blogging, group organizing, and event planning applications. While most academic work tends to view technological change as something that happens exogenously to electoral politics, BSD’s platform developed in response to many of the concrete challenges that Dean’s former staffers faced on the campaign and in their subsequent electoral work. The platform’s integration, for instance, grew out of BSD’s founders’ frustration with the proliferation of separate applications and databases during the Dean campaign. The firm built its group-organizing tools to provide a technical solution to the problem of campaign staffers losing data when Dean’s supporters used commercial applications such as Yahoo! Groups to organize. BSD extended the capacity of its platform and built these and other tools through its work with organizations such as DFA, MoveOn Student Action, and ProgressNow, a multistate progressive advocacy organization, among other organizations. The national Democratic Party invested in the platform’s capacity and implemented it as PartyBuilder for the midterm elections in 2006. BSD provided this platform to a number of the 2008 presidential campaigns, including that of Barack Obama.

At the same time, BSD’s founders learned many strategic and organizing lessons from the Dean campaign. The campaign’s innovation was to conceptualize supporters as potential participants and to use new media tools to coordinate their efforts. After witnessing much of the necessary reactivity of the campaign and the ongoing struggle to create best practices for this online organizing, Rospars helped to strategize with clients to create clear goals and expectations for supporter engagement. As Rospars describes it, the firm’s approach was to ensure that “those relationships that people have laterally are in the service of the outcomes that the organization seeks,” outcomes that need to be strategized and planned.<sup>50</sup> At the party, Rospars worked to integrate online and field operations for the midterm elections, developing practices that he later deployed on the Obama campaign. These included creating internal work practices that led to collaborations between new media and field staffers, using geo-targeted e-mails to turn supporters out at field offices and field events, and creating online systems to further supporters’ ability to engage in their own voter canvasses.

The party and its allies also invested in training new staffers to specialize in new media campaigning and created opportunities to keep political practitioners

employed and active between election cycles. The staffers of new training organizations such as the New Organizing Institute (NOI), as well as the party and the consultancies BSD and EchoDitto, a firm also founded by former Dean staffers, helped to codify best practices for online organizing and trained hundreds of individuals in them.<sup>51</sup> These included techniques for creating narrative and optimized e-mails, setting goals for online campaigning, and working with supporters using new media.<sup>52</sup> In addition to the extensive training that these organizations offered, they also provided employment opportunities for many of the staffers of the 2004 and 2006 campaigns to help keep them in politics. As Franklin-Hodge, a cofounder of BSD and the firm's chief technology officer, relates: "We were much better at saying 'ok, the campaign is over so come back home to the party. We will pay your salary, we will keep you in play, we might send you to this state or that state, but recognize that a lot of what we're doing is keeping you on path for the next big race when we really need the top talent.'"<sup>53</sup>

The development of the organizational and technical infrastructure for online electoral campaigning in the years between elections meant that the Obama campaign had access to tools and knowledge for harnessing the mobilization around his historic candidacy that simply did not exist in 2004. While the Dean campaign built many of its tools as needs arose over the course of the primaries, the 2008 Obama campaign launched the BSD platform for the candidate's announcement speech approximately a week after hiring the firm. This meant that the campaign had a robust online platform in place to immediately translate supporter interest into electoral resources. The platform, hosted at My.BarackObama.com (MyBO), featured many of the tools first used on the Dean campaign, including event planning and group organizing tools, personalized fund-raising applications, and social networking capabilities. At the back end, the campaign had the most developed content and customer relations management system in politics and access to the party's voter file through VoteBuilder. Even more, the campaign drew on the deep knowledge and experience of its new media director, Joe Rospars.

It was this combination of tools and strategy developed in 2004 and honed between elections that helped Obama gain concrete electoral resources in 2007 and 2008. As Kevin Thurman describes the success of his rival's campaign:

There is an untold story of the Obama campaign. The technology was phenomenal . . . but it is a misnomer that the social networking is what raised Obama a ton of money. It's wrong. It was the kernel of the concept of how you raise that much money, how you get people involved in the campaign on a grassroots level. That comes from the Dean campaign. But the way that it was polished and molded at Blue State Digital for our clients made a big difference for what they did at the DNC [Democratic National Committee] when Dean was in charge. Then Obama was able to use it.<sup>54</sup>

## Organizational Contexts of New Media Use

Historian Richard John described the wonder and dread that the 1820s public felt toward the functioning of the U.S. post office as a “bureaucratic sublime.”<sup>55</sup> The public marveled at the organization of the post office, the large-scale, coordinated human activity that created a communications link between the hinterlands of the American wilderness and the nation’s metropolitan environs. During the last century, however, much of the awe of human organization has seemingly been displaced by a “technological sublime” directed at the artifacts of our own creation.<sup>56</sup>

The American technological sublime is readily apparent in the fascination that many journalists and scholars had with the technological dazzle of the Obama campaign. Technology guru Tim O’Reilly expresses this sublime perfectly in his description of the campaign’s “Houdini Project,” a real-time system of monitoring when voters went to the polls. In language that recalls social theorist Lewis Mumford’s classic work on the “megamachine,” O’Reilly argues that we should:

Consider *My.BarackObama.com* as a kind of vast machine, with humans as extensions of the programmatic brain. . . . Inside the machine, programmers are tuning the algorithms, while top campaign staffers are making key decisions to adjust the resource mix. . . . The “explicit” social media elements of *My.BarackObama.com* paled in impact compared to the development of a next generation electronic nervous system, in which volunteers were trained, deployed, and managed by a web application who used them, in Sean McMullen’s memorable phrase, as “souls in the great machine.”<sup>57</sup>

O’Reilly’s narrative neatly captures the technologically sublime response to the Obama campaign. Other accounts of the campaign express similar emotions toward the “online nervous system” of the campaign, from *My.BarackObama.com* to the Facebook application, although they tend toward the celebratory.<sup>58</sup> In focusing on the technical, however, these accounts overlook the bureaucratic objects that were part of the imaginary of the nineteenth century: the social organization, management structures, large-scale coordination, and meticulous planning that were behind Obama’s successful run. As detailed above, networked technologies alone did not produce the enormous energy around Obama’s candidacy, nor were they the determinants of electoral success. The presidential campaigns of Bill Richardson and Tom Vilsack also hired BSD early in 2007 and had essentially the same functionality of MyBO and the firm’s strategy services. Moreover, as Chapter 6 details, the Houdini Project never worked as planned, for a host of technical and organizational reasons, and was largely abandoned.

The Obama campaign was first and foremost an achievement of organization, the hard work of its staffers to bring people, tools, and practices into alignment and in accord with electoral strategy.<sup>59</sup> The sophistication and polish often associated with the Obama campaign was generally unrecognizable in the moment to staffers as they engaged in the work of crafting the practices, tools, and systems behind the new media operations. Even with a powerful campaign platform in place and the political knowledge and skills of the division's leadership, organizing the Obama campaign was a significant sociotechnical accomplishment.

A key reason for the success of the campaign was a senior leadership that invested in new media early in the primaries, created the organizational structure that made the New Media Division a central part of the campaign, and helped to integrate its work with the finance, field, and communications operations. Similar to the Dean campaign, early in the primaries Obama's senior leadership believed that the campaign needed to make new media central to the candidate's electoral strategy. Obama enjoyed a prominent national profile, given his electrifying speech at the Democratic National Convention in 2004. But, as the junior senator from Illinois with less than one term in office, he lacked the institutional resources of Hillary Clinton. Obama did not have the deep fund-raising networks or turnout resources of the local party organizations commanded by state Democratic leaders, many of whom backed Clinton. Staffers also describe how campaign manager David Plouffe saw a need for the campaign to expand the electoral map.<sup>60</sup>

Given the need for financial and human resources to compensate for these shortfalls, the leadership invested in new media, making a number of early consequential decisions that shaped the way in which the campaign unfolded. The campaign's leadership created a New Media Division with an organizational role equal to that of the other divisions of the campaign such as field, finance, and communications. In January 2007, the campaign hired Joe Rospars as its new media director, a senior staff position. Rospars took a leave from BSD, and after a vetting process the campaign hired the firm to provide the platform for My.BarackObama.com.<sup>61</sup> Unlike the Dean campaign, Rospars had the luxury of having a robust electoral platform in place, which meant that he had comparatively more time to negotiate the division's responsibilities, plan its structure, and create the strategy for his staffers' electoral work. As a result, the division's role in the larger campaign organization and staffing structure was better defined early in the primaries. For example, the senior leadership clarified the responsibilities of the campaign's divisions in the winter of 2007. While on the Dean campaign it was never quite clear which department handled what, given that everyone used the Internet, Rospars negotiated for authority over specific areas of campaign practice such as e-mail that other divisions also tried to lay claim to. Clear organizational domains meant that staffers of different divisions were not working at cross-purposes or duplicating their efforts. The advance planning and

organizing conducted by Rospars enabled the division to adapt to the rapid growth of the campaign and its new media operations as the primaries unfolded.<sup>62</sup>

Meanwhile, New Media Division staffers' work accorded with the overall electoral strategy of the campaign and was integrated with, albeit imperfectly, the operations of the field effort.<sup>63</sup> New media staffers steered supporters coming to the campaign's online platform into field offices, built applications that enabled citizens to register to vote and find their polling places online, and used their massive e-mail list to mobilize volunteers to travel to battleground states. The campaign used Facebook to organize young voters in Iowa, setting up Obama groups for all the local high schools—which organizers then used to recruit students to work in campaign offices. The centerpiece of the campaign's new media effort, however, was organizing the efforts of supporters using MyBO to plan events and canvass voters. Chris Hughes, a cofounder of Facebook and director of Internet organizing for the campaign, describes how, at first, new media staffers' strategy of interacting with supporters on MyBO was simply characterized by the attitude of "don't wait for us; don't wait for somebody to tell you what to do."<sup>64</sup> As time went on, however, division staffers more actively coordinated the work of supporters to further the field goals of the campaign. This involved staffers reaching out to volunteer leaders on MyBO, responding to their many queries, and setting expectations and goals. As Hughes describes, "As 2007 progressed, it was [our job to] really help these grassroots activists structure their activities and what they do to help us win."<sup>65</sup>

This organizing paid dividends on "Super Tuesday." The Obama groups that supporters set up on MyBO were a significant asset for field organizers hitting the ground in advance of the 23 state contests held on February 5. Field staffers were able to rapidly deploy volunteers from these groups for voter outreach, helping the campaign overcome the logistical challenges of setting up ground operations in these states. In part as a result of the use of new media, Obama more than held his own against Clinton on Super Tuesday, a crucial test of organization and viability after the split results of the four early contests.<sup>66</sup> Neil Sroka, the state new media director for South Carolina, describes how Hughes's team:

helped the grass grow and provided the fertilizer, so to speak, so that literally when the first organizer hit the ground they had a list of people that were committed and had already knocked on doors for Obama and had already started building an organization. And, that is why you hear these stories and see these pictures online writing about the first organizational meetings there were 200 people at them. It is because the grassroots have already cultivated, the sod had already been laid down and fertilized over the previous summer.<sup>67</sup>

The Obama campaign was also adept at managing its technical development. Reflecting the campaign's need for resources, Plouffe told staffers that they needed to run an exceptionally well-managed campaign and innovate in their respective domains to have a chance of winning. As Slaby describes, this opened a space for experimentation that permeated the campaign: "The willingness of people like Plouffe to say 'question all sorts of things' made room for us to innovate as a campaign. And that meant field strategy, that meant organizing strategy, and of course that means that there is room for innovation in new media."<sup>68</sup>

Organizational dynamics shaped these new media innovations. The technical work of the campaign required intradivision collaboration and coordination. Staffers from across the campaign needed to agree on electoral priorities and work together to develop tools that were integrated with work processes. These tools, meanwhile, needed to be aligned with other technical systems, some of which were developed by outside organizations such as the party. This collaboration among staffers across the campaign's divisions was a hard won organizational achievement, and never perfect from the campaign's perspective, but it resulted in some innovative efforts. To coordinate technical work, the New Media Division hired liaisons who worked with staffers in the Field, Communications, and Technology Divisions. For example, staffers in the New Media Division built the campaign's "Vote for Change" voter registration application and its polling place look-up tool with an eye towards the priorities of the field effort. The campaign also coordinated large-scale development projects with the party and BSD. The campaign hired developers whom BSD housed and managed, with the campaign's chief technology officer managing relations with the firm and its liaison to the campaign, Franklin-Hodge. The campaign, for instance, spent much of the general election working with the DNC and BSD on Neighbor-to-Neighbor (N2N), an online calling tool integrated with the voter file. The goal of N2N, which the party commissioned BSD to build for the eventual nominee in 2007, was to further the field campaign by moving "the line between staff and volunteer a lot higher on the organization chart."<sup>69</sup> This meant providing supporters with opportunities that were once the responsibility of paid staffers, such as entering data from canvass calls.

The campaign struggled throughout the general election to integrate the back ends of its various databases, especially the BSD online database and Vote-Builder for N2N, which ultimately limited its utility as a tool. But the application demonstrates how staffers built tools to maximize the electoral participation of supporters. The N2N calling tool lowered the cost of electoral participation by enabling supporters to contribute to the campaign from the comfort of their own homes. N2N also enabled the campaign to more easily access and leverage the resources of a pool of volunteers located in "blue states" where there was little active campaigning taking place. In using N2N, volunteers working online



had more information at their fingertips than they would have with conventional walk lists, including basic information on members of their neighbors' households (e.g., ages, party affiliation, registration status, and the results of prior canvasses). At the same time, the online system provided the campaign with more control over these voter contacts. The campaign developed and tested a number of different scripts, depending on the category of the voter in question, and the system encouraged supporters to follow these scripts exactly and to read them in their entirety. Meanwhile, the automated online system enabled the campaign to better control the quality of data being entered into the system, forcing volunteers to conform to particular categories and not enter extraneous information.

The New Media Division was also innovative in its use of data. Rospars developed what I refer to as a "computational management" style in which staffers delegated key managerial, allocative, and design decisions to the results of rigorous and ongoing data analysis. For example, staffers used computational management as an internal tool to make staffing and budgetary decisions. The division routinely evaluated questions such as whether hiring additional e-mail or online advertising staffers would net more money or volunteers for the campaign. This is but one example of how the division calculated the "return on investment" (ROI) for each additional dollar invested in a domain of new media practice versus other potential expenditures. This rigorous analysis of the ROI of every new media expenditure enabled the division to be efficient both in its own work and to demonstrate its effectiveness to the larger campaign in order to garner resources. The division's computational management practices enabled staffers to report exactly what acquiring an e-mail address cost, as well as its value in terms of donations, and to use these figures to justify their expenditures on staff and technology. Staffers cited with pride how the New Media Division was actually in the black, profiting the campaign. Even more, these computational management practices had predictive power, enabling staffers to anticipate resource flows down to the minute.

Staffers also used data as an external management tool to generate the actions they desired from supporters. As supporters interacted with the campaign's media, data rendered them visible to staffers. Transforming user actions into data enabled staffers to create abstract representations of supporters that they then used to produce resources for the campaign. For example, the campaign engaged in what the industry calls "A/B testing" of its e-mail and webpage content and design. Prevalent in commercial settings, A/B testing enabled the campaign to target the content and design of e-mail and webpages to specific supporters to increase the probability of desired actions, such as contributions.<sup>70</sup> The campaign continually ran experimental trials of e-mail subject heads to find the ones most likely to increase "click through" rates. The actions that staffers sought to induce were contingent upon both electoral strategy and the characteristics of the targeted

individual. If an individual was a first-time subscriber to the e-mail list, for instance, they received a different request from the campaign than a long-time volunteer.<sup>71</sup> The campaign could generally predict the aggregate outcome of each e-mail solicitation for money and volunteers, and the optimal targeting and design to achieve it, given detailed supporter data and sophisticated systems that tracked when individuals opened e-mails and took online action. The same data practices carried through to the campaign's design work. Site administrators generated different webpage designs, often altering only small details such as the color and shape of the donation button, and tested their click through rates by sampling users. Staffers then analyzed the data to determine which design features were optimal. In these practices, the New Media Division of the Obama campaign functioned as a "computational object," basing much of its communication, coordination, and design practice on the data that continually rendered, and helped produce, an ever-shifting reality of supporter engagement.<sup>72</sup>

Not everything was the subject of rigorous data testing, however. Even as the campaign spent the bulk of its resources on broadcast and cable advertising, networked technologies were an essential part of the symbolic repertoire of the Obama campaign.<sup>73</sup> Staffers used the blog and website design to represent the campaign and to mobilize supporters.<sup>74</sup> Much of contemporary political communication takes place through digital media, so the networked interfaces that connect citizens to candidates, campaign organizations, and one another served as sites for the propagation, diffusion, and co-creation of the meaning of Obama's run. They also produced the emotions that helped inspire and sustain collective action.<sup>75</sup> The affordances of networked communications tools offer qualitatively new opportunities for this cultural work. The interactivity of Obama's web presence enabled supporters to gather around the candidate and to communicate with one another in highly social and participatory ways.<sup>76</sup> As they did so, supporters moved through the symbolic worlds that staffers designed to help create an "experience" of Obama's candidacy, the moment in history, and the stakes for America.<sup>77</sup> The New Media Division had marked autonomy to craft and control this experience within the larger campaign's messaging strategy (i.e., no negative attacks) and with only informal coordination with the Communications Division.

For example, staffers used the blog to portray the campaign as a grassroots movement and to provide a venue for supporters to forge solidarity, make public commitments to the campaign, and defend Obama from the attacks of other candidates and the news media. Staffers also utilized design extensively to create and impart the meaning of Obama's candidacy, a departure from recent political campaigns.<sup>78</sup> While the crafting of the content of television advertisements and speeches has long been a part of political practice, campaigns have historically paid less attention to design, other than logos.<sup>79</sup> This has been true even over the

past decade and a half of Internet campaigning, where design is often an outsourced afterthought for political staffers. In contrast, Obama's staffers conceived of design, from candidate placards to the splash (or landing) page of the website, as a symbolic resource to help construct and reinforce the meaning of the campaign.

Staffers used design to try to create an alternative, expansive, and meaning-laden "political horizon" among supporters that would impart a sense of political efficacy.<sup>80</sup> For example, Scott Thomas, one of the campaign's in-house designers, sought to "communicate the excitement that this candidate offered the United States of America and that this election season really offered to the country."<sup>81</sup> Designers developed what Thomas referred to as an "aesthetic of Obama" intended to help supporters and staffers alike imagine the candidate as a transformational figure and the campaign as a participatory movement that could change America.<sup>82</sup> As part of this aesthetic, designers created a number of different "brand groups," or themes, intended to convey particular understandings of the campaign and candidate. The general "campaign brand" featured the iconic Obama blue, campaign logo, and standardized typeface—the very consistency of which designers used to suggest that the candidate was efficient and experienced. Designers pored through historical documents and photographs of iconic American events, such as scenes from the civil rights movement, to stylize images of Obama in ways that would conjure up associations between the candidate and these events. Designers also created a brand group that consisted of official-looking documents in order to help the public imagine Obama as president. Finally, staffers utilized a "supporter" theme which involved customized versions of the campaign's logo for different demographic and affinity groups.

## New Media, Electoral Campaigning, and Democracy

In his first speech to the nation as president-elect, Obama attributed his historic victory to "the millions of Americans who volunteered, and organized, and proved that more than two centuries later, a government of the people, by the people and for the people has not perished from this Earth." Much popular and scholarly discourse has followed Obama's lead in analyzing the extraordinary participation around the campaign and new media's role in facilitating new avenues for political expression and engagement. Asking instead how campaigns strategically use new media necessarily provides a more nuanced perspective of contemporary electoral campaigning. The structured interactivity of the Dean and Obama campaigns and computational management practices of the Obama campaign suggest the extent to which these organizations focused on the traditional metrics of electoral success. Indeed, the mantra of Obama's New Media Division was "money, message, and mobilization"—which have long served as

the staple resources of electioneering. For campaigns, electoral politics is highly transactional, with very clear metrics that define success. Creating opportunities for supporters to have what many theorists would consider higher order participation in these campaigns, such as providing input into policy positions, detracts from the work that needs to be done, given the ruthless electoral math of fund-raising deadlines and canvass targets.<sup>83</sup>

As such, the history presented here suggests that new media have not brought about a qualitatively new form of politics. In keeping with institutional perspectives detailed by Philip Agre, among others, the book shows that new media have dramatically amplified some forms of political participation.<sup>84</sup> Campaigns' use of new media has significantly lowered the cost of making small-dollar contributions online. Supporters have more opportunities to volunteer, and it is far easier to do so than it once was, as phone banking, event planning, and fund-raising have gone online. What new media have not done is to necessarily make candidates more responsive to their mobilized supporters, as the "Get FISA Right" (Foreign Intelligence Surveillance Act) protests around the Obama campaign, detailed in Chapter 6, suggest.<sup>85</sup> Despite predictions to the contrary, the book shows that the use of new media in *campaigning* has seemingly not brought about fundamental changes in the levers of accountability, forms of political representation, quality of democratic conversation, or distribution of power in the American polity.

This is not to say that campaigns need to play a transformational role in democratic life. New media tools in campaigning work best as coordinating machinery when we are enthralled with a vision of transformation, and sure of our ends—and willing to work for them.<sup>86</sup> While scholars such as Jeffrey Alexander have persuasively shown how candidates, filtered through mass media, rhetorically articulate civic values to win the consent of citizens, new media staffers generally focus on mobilizing preexisting selves who bring their ideological commitments to the public sphere.<sup>87</sup> Campaigns use new media to mobilize sheer numbers of individuals to deliver financial, human, and political resources. While at times they may be the by-products of campaigns, the forms of mediated electoral participation documented here are not designed for the ends of psychological growth, the development of civic skills, discovery of the public interest, achieving democratic legitimacy, or community building—claims historically made for increased participation in civic life.<sup>88</sup>

It is in this sense of the endurance of electoral mobilization that I offer the book's title, *Taking Our Country Back*. The phrase long predates Dean's presidential run. The archconservative Pat Buchanan used the slogan for his own presidential bid in 1992.<sup>89</sup> Buchanan, of course, wanted to take the country back from very different people. As such, the slogan reveals continuities in electoral politics in the face of considerable technological change. Insurgent candidates seek to mobilize supporters for money and volunteers, and use all the tools at their disposal to do

so. This is a time-honored phenomenon, particularly in an era when parties are more diffuse, candidates more autonomous, and the news media exert a more influential role in the process since the electoral reforms implemented in the wake of the 1968 Chicago Democratic National Convention.<sup>90</sup>

At the same time, however, this book suggests that new media use in campaigning is far from the professionally “managed” polity that many have feared, given the proliferation of data that enable the “narrowcasting” of persuasive political communication to small segments of the electorate.<sup>91</sup> While these practices certainly occur in staffers’ use of e-mail and the probabilistic control that optimization and online advertising offers, narrowcasting is only one aspect of contemporary political campaigns. The Dean and Obama campaigns genuinely respected supporters and sought to empower them for electoral ends. Indeed, voluntaristic collaboration requires relationships that are not solely transactional; supporters need to feel that their contributions are valued and worthwhile and that they are listened to, or they will not participate.

Weighing the balance between supporter desires and expectations and the resource needs of electoral campaigns is difficult. As campaign staffer Teddy Goff, who oversaw Obama’s state-level new media teams during the general election and is now the digital director of the president’s reelection bid, describes, there was always a tension between “the desire to be authentic and the desire to be super duper effective.”<sup>92</sup> Former new media staffers on the Obama campaign often used the word “authentic” to describe their work. These staffers prided themselves on thinking about supporters and striving to live up to the participatory ideals that they believed the campaign was about. These individuals did not just pay lip service to supporters; these values actively shaped new media practice. For example, staffers set limits on how much they would automate their tailored e-mails, given that they wanted to maintain a degree of authenticity in their relationships with supporters. As Goff explained:

Had we been confronted by data that showed that an automated e-mail program would have raised twice the amount of money that we were raising, that would have been a crisis. I guess we would have had to go do that, but it is just not what we wanted to do. . . . It is a fairly constant tension between this almost crusader-like mentality of focusing on the user. . . . We didn’t want to base too much on that [automation] operation. We wanted enough to be able to maximize returns to the degree we are comfortable with, but I am sure we could have raised a lot more money had we pursued things in a different way. . . .<sup>93</sup>

It is in this context that technical design and the abstractions made possible by data helped staffers manage this balance. Staffers delegated the challenge

of coordination to technical design, such as building in certain affordances to the electoral platform. Data and analytics enabled the campaign to create abstract representations of its supporters that were then managed more transactionally. Meanwhile, the stories of supporters that came from other campaign channels, such as the blog and the video team, provided a picture of users that much of the data elided.

Supporters, meanwhile, wanted to feel like their contributions and input were valued by the campaign, even as they wanted staffers to maximize their time and donations. Supporters wanted Obama's opponents to be defeated, and were generally willing to serve in that effort as best they could. As a result, Obama's supporters accepted the conditions of their participation, so long as the goals of the individuals taking distributed electoral action and those of the campaign were aligned. This was the norm for most of the campaign. Yet, as detailed in Chapter 6, this balance between supporter desires and staffer needs broke down at times when supporters felt as though they were not being heard, such as when they organized using the campaign's own tools against the candidate's changed position on the Foreign Intelligence Surveillance Act.<sup>94</sup> During this moment of crisis, the transactional elements of the campaign came into full view, and supporters exercised their "voice," expressing frustration and disappointment on the campaign's blog, though they ultimately remained loyal.<sup>95</sup>

## Methods and Chapter Outline

The historical research presented here spans nearly a decade and includes a number of different sources of data, including interviews, analysis of published works, and fieldwork. The core of the research that animates this book consists of open-ended interviews with more than 60 Internet and new media staffers, consultants, and volunteers active across the 2000, 2004, and 2008 election cycles. I interviewed individuals who had worked on a number of different campaigns, including those of Al Gore, Howard Dean, Wesley Clark, John Kerry, John Edwards (2004 and 2008), Barack Obama, Tom Vilsack, and Hillary Clinton. I also interviewed individuals who worked for organizations that support campaigns, such as the Democratic Party, the New Organizing Institute, and Voter Activation Network, as well as consultancies such as Advomatic, Blue State Digital, EchoDitto, and Trilogy Interactive.

Given that the Dean and Obama campaigns were the focus of this study, I interviewed nearly the entire Internet Department of the Dean campaign and the principals of the New Media Division of the Obama campaign, as well as other individuals who played key roles in the technical operations of these campaigns,



including systems administrators and technology officers. I also interviewed staffers on both of these campaigns who worked in other organizational divisions, such as field and finance.<sup>96</sup> In addition, many staffers who worked on the Obama campaign also worked for the presidential transition and Organizing for America (OFA). I used interviews with staffers on other campaigns to verify information and to compare practices across campaigns and electoral cycles. All interviews were “on-the-record,” although participants could declare any statement “off-the-record,” “not for attribution,” or “on background” at their discretion. This happened very rarely in practice. No individuals whom I contacted explicitly declined to participate in this study, although scheduling challenges did not permit me to interview everyone of interest to the history here. I purposively selected interviewees on the basis of their positions in these campaign organizations, as revealed by Federal Election Commission organizational filings, including those compiled on websites such as the George Washington University elections project, and through public data on the organizations and consultancies launched after the 2004 elections.<sup>97</sup>

This book also draws on the accounts of a number of campaign staff and volunteers, practitioners, and journalists who reflected on the Dean and Obama campaigns in books, talks, and articles. In relation to the Dean campaign, these works include Joe Trippi’s influential autobiographical account *The Revolution Will Not Be Televised* and Thomas Streeter and Zephyr Teachout’s edited collection *Mousepads, Shoe Leather, and Hope*. For the Obama campaign, I draw on practitioner Colin Delany’s *Learning From Obama* and campaign manager David Plouffe’s *The Audacity to Win*, as well as talks by campaign staffers such as Dan Siroker, director of analytics, and Scott Thomas, design director. This book extends these accounts by weaving them together into a single chronological history, while analytically bringing questions of innovation, infrastructure, and organization to the fore.

I also engaged in participant observation as a California-based volunteer for the Obama campaign during the primaries and general election. I extensively used the suite of tools hosted on My.BarackObama.com and the campaign’s voter database over many months as a precinct captain in San Francisco. As a precinct captain, I went door to door canvassing for the candidate in the Mission District, was trained on and used the campaign’s tools to deploy volunteers to contact targeted voters, and made hundreds of phone calls in the months before the California primary. I also served as a “Virtual Precinct Captain” of a district in Laredo, Texas, using online databases to call hundreds of voters in advance of the primary and caucuses. During the general election, I travelled to the electorally important county of Washoe, Nevada to walk alongside other Obama volunteers as they went door to door to canvas for their candidate.

## CHAPTER OUTLINE

This book provides a rich look at the history of the staffers, organizations, and technologies that have shaped new media and Democratic campaigning over the last decade. It focuses especially closely on the Dean and Obama campaigns, the structures of these organizations and the tools they deployed, and the technological and institutional contexts in which they took shape. As a work of history, the book proceeds chronologically. The story begins in 2002, with initial independent blogger efforts taking shape around the Dean campaign, and concludes with the president-elect's speech in Grant Park.

Chapter 2, "Crafting Networked Politics," begins in the summer of 2002, when many now-prominent bloggers began promoting Dean's candidacy and Trippi started plotting the online strategy of the campaign. The chapter details the political climate and primary field at the time and the growing importance of these political blogs and new commercial services, such as Meetup, as organizational vehicles for independent supporter efforts. Chapter 2 shows how these efforts delivered key monetary, organizational, technical, and human resources to the fledgling campaign. It then reveals how the campaign took shape as an organization and chronicles the efforts of its Internet staffers to craft goals, strategies, and practices for coordinating the work of online supporters to help routinize these resources. The chapter ends with consideration of the role of MoveOn staffers in helping Dean's Internet team develop new practices around e-mail and tools for event planning. With strong fund-raising and increasing journalistic attention, Dean emerged as the front-runner for the nomination after the second quarter, so much so that the candidate graced the covers of both *Time* and *Newsweek* in mid-August.

Chapter 3, "Dean's Demise and Taking on Bush," begins with Dean's "Sleepless Summer Tour" and ends with Kerry's defeat at the hands of George W. Bush. Dean's eight-city tour drew tens of thousands to rallies, revealing the extent of the candidate's national support and the power of staffers' use of the Internet to mobilize supporters across the country. The success of Sleepless Summer provides a revealing contrast to the field efforts on-the-ground in Iowa, which the campaign's leadership began to realize were seriously flawed in the fall. Despite the campaign deploying staffers to Iowa during this time, the caucus effort was fatally under-organized. Staffers on-the-ground in Iowa faced significant data issues and lacked very basic tools for organizing volunteers and contacting voters, even as national campaign staffers faced extensive data and systems issues of their own at the time. The campaign also had a series of missteps leading up to the caucuses. Journalists found footage of Dean making disparaging comments about the caucuses, which became a big controversy in Iowa. The campaign also ran ineffective television advertisements that practically bankrupted the campaign.

In the end, Dean had little hope for a better outcome than third. Dean's highly publicized "scream," endlessly replayed on national television, effectively ended his candidacy, despite a strong field effort in New Hampshire that enabled him to finish second. The chapter concludes by following a number of Dean's staffers and consultants to the campaign of John Kerry, where they worked on Internet operations and found a very different ethos and organization.

Chapter 4, "Wiring the Party," reveals how, in the wake of Dean's defeat, a number of his former staffers stayed in politics, founding political consultancies and other ventures. Through these organizations Dean's former staffers carried their tools and practices to other Democratic campaigns and advocacy organizations and trained political staffers. The chapter tells this story through the lens of the history of Blue State Digital, detailing the founders' work for Democracy for America, the transfer of ownership of tools from the Dean campaign to the fledgling firm, the efforts to help Dean get elected chair of the party, and subsequent development of the electoral platform through work with clients such as ProgressNow. It then follows the work of two of BSD's founders on two massive and extraordinarily challenging sociotechnical projects that made substantial contributions to subsequent electoral victories: rebuilding the party's voter file, and implementing a new online platform and practices for electoral campaigning.

Chapter 5, "Organizing the Obama Campaign," follows the Obama campaign from the winter of 2007 to the eve of the Iowa caucuses. In doing so, it tells the story of how the Obama campaign drew from the infrastructure for online Democratic campaigning that had been created between election cycles. The campaign hired Joe Rospars as the campaign's new media director and BSD to provide the online electoral platform. The chapter details how the campaign made a number of key organizational decisions that shaped the role that new media played in the campaign, including hiring Rospars as a member of the senior staff, and giving him a voice in all the key strategic decisions. Chapter 5 then provides an extensive discussion of the "money, message, and mobilization" approach of Rospars and his new media team, detailing the campaign's strategy behind its use of e-mail, the blog, and design. All these tools were backed by extensive use of computational management practices that calculated the returns on investment for nearly all this new media work.

Chapter 6, "Mobilizing for Victory," looks closely at how the Obama campaign integrated its new media and field efforts for the primaries and the general election. While Dean's campaign collapsed in part because of the large disconnect between the national campaign and what was taking place on-the-ground in Iowa, Obama's staffers worked to ensure that new media efforts furthered the field efforts. To this end, the campaign's online organizers worked with supporters on the MyBO platform and on Facebook, creating distributed supporter operations

that furthered the campaign's field efforts in the primaries, especially the 23 state contests that took place on Super Tuesday. As field staffers hit the ground in these states, in some cases only 24 hours after the South Carolina primary, they had access to hundreds of willing volunteers who were already mobilized and active in their communities. The chapter also shows how online organizing efforts played a crucial role in supporting field operations during the general election, as did a number of tools that the division launched, including Neighbor-to-Neighbor and Vote for Change.

The book's conclusion opens with staffers rushing to send out a final "thank you" e-mail before racing to catch the last bus (or just running) to hear Obama's victory speech in Grant Park. It then discusses the analytical insights that emerge from the historical findings of the book and the implications of the uptake of new media in electoral processes.