

# Notes

## Acknowledgments

1. Staff titles on campaigns are often inexact or left unspecified. There are often different versions of formal titles in Federal Election Commission filings, staffers themselves used many variants of titles when addressing their work, and many staffers changed positions during the course of these campaigns. I report the best approximation of these staffers' titles here when they are available, choosing the most consistent way they represented themselves in interviews and on online sites such as LinkedIn, checked against how they were represented in organizational records. When the title is unclear, I use more general descriptions to capture staff positions on these campaigns, and rely on the narrative in the book to provide more context regarding organizational roles. In addition, there is not a clear moment when primary campaigns end and general election campaigns begin, as campaigns begin restructuring and staffing for general elections well in advance of the formal nominating process. The designation of 'primary' and 'general' election campaigns should therefore be considered approximate.

## Chapter 1

1. WPP Digital, a global communications firm, acquired Blue State Digital in December 2010.
2. A number of scholarly works have sought to explain the impressive mobilization around Obama's candidacy. See Alexander, *The Performance of Politics*; Formisano, "Populist Currents in the 2008 Presidential Campaign"; Castells, *Communication Power*; and Knorr Cetina, "What Is a Pipe?"
3. Michael Slaby, personal communication, August 18, 2010.
4. Schudson, *The Good Citizen*.
5. The campaign had over 3 million active volunteers, but still utilized paid phonebankers; Jamieson, *Electing the President, 2008*.
6. The trajectory of academic thought regarding new media and politics can be broken into three general periods: optimism, reinforcement, and collective action. The first dates from the early 1990s through to the collapse of the dot.com bubble and features optimistic accounts of the Internet's effect on democracy. See Barber, "The New Telecommunications Technology"; and Grossman, *The Electronic Republic*. During the second wave that emerged at the turn of the century, a group of scholars argued that the Internet reinforced extant political power. See Bimber and Davis, *Campaigning Online*; Davis, *The Web of Politics*; and Margolis and Resnick, *Politics As Usual*. For an extensive overview of the literature on new media and politics see Neuman, Bimber, and Hindman, "The Internet and Four Dimensions of Citizenship"; and Boulianne, "Does Internet Use Affect Engagement?"

7. Classic work on transaction costs includes Coase, “The Nature of the Firm”; Olson, *The Logic of Collective Action*; and Williamson, *Markets and Hierarchies*. In Olson’s paradigmatic account, “free-riding” is the defining problem of collective action, in which rational actors will choose not to participate, given that they will benefit from public goods despite their lack of involvement.
8. Chadwick, “Web 2.0.”
9. See Benkler, *The Wealth of Networks*; Bimber, Flanagin, and Stohl, “Reconceptualizing Collective Action in the Contemporary Media Environment”; Earl and Kimport, *Digitally Enabled Social Change*; Lupia and Sin, “Which Public Goods Are Endangered?”; and Norris, *Digital Divide*.
10. See Castells, *Communication Power*; Jenkins, *Convergence Culture*; and Jenkins and Thorburn, *Democracy and New Media*.
11. A number of works chronicle innovations on the Dean campaign without analyzing why they occurred. See Hindman, “The Real Lessons of Howard Dean”; Kreiss, “Developing the ‘Good Citizen’”; Panagopoulos, *Politicking Online*; and Wiese and Gronbeck, “Campaign 2004 Developments in Cyberpolitics.” An exception is Streeter and Teachout’s edited collection of firsthand accounts that reveal innovation in the making; Streeter and Teachout, *Mousepads, Shoe Leather, and Hope*.
12. In *Information and American Democracy*, Bimber notes that established political entities have considerably more resources to invest in online campaign services, which has mitigated the potential of new media to level the playing field among differentially resourced organizations.
13. To tell this history, I draw on actor-network theory’s methodological approach of “following the actors” as they assemble the sociotechnical. See Latour, *Reassembling the Social*; and *Science in Action*. The book follows the work of political actors as they create the information environments that many scholars focus on as the cause of changes in political collective action. I also borrow from a related body of work that takes the building and evolution of infrastructure as its object of analysis. Much of this literature proceeds from Star and Bowker’s methodological work on “infrastructural inversion” in *Sorting Things Out*. As scholars such as Paul Edwards have shown, infrastructural inversion can proceed historically, showing how infrastructure both provides a background context for action and is shaped by sociotechnical action and institutions over time; Edwards, *A Vast Machine*. Drawing on this work, I document how campaigns and consultancies shaped, while being shaped by, the infrastructural contexts in which they acted. Understanding the Obama campaign required a historical approach to uncovering the background contexts of action which made it possible.
14. I draw here on work that analyzes a network mode of social organization that is distinct from both the market and the hierarchical firm. See Powell, “Neither Market nor Hierarchy”; and Podolny and Page, “Network Forms of Organization.”
15. The term “netroots” eventually became more expansive, providing a compelling banner under which the entire online progressive movement organized itself. See Kerbel, *Netroots*. For a number of chapters discussing the role of blogs in the 2004 elections, see Tremayne, *Blogging, Citizenship, and the Future of Media*.
16. Aaron Myers, a longtime web developer and veteran of the Gore and Kerry campaigns, as well as both of Edwards’s runs, remembers that at the start of the 2000 cycle, campaigns could not collect money online: “In 1999 it was illegal for campaigns to take contributions by credit card . . . the only way to make contributions was by printing out a form and cashing a check and mailing it in. And then what changed all of that was actually a petition . . . by the Bush campaign to the FEC”; Myers, personal communication, May 9, 2009.
17. For an extensive discussion of McCain’s campaign, see Kaid, *The Millennium Election*.
18. The Gore campaign had multiple users of its website in mind, including committed supporters, undecided voters, children, and local Democratic officials who needed policy information; Myers, personal communication, May 9, 2009. There is evidence that there are many users visiting sites throughout campaigns for different purposes. Numerous staffers

on the Dean campaign, for instance, describe how during the last two weeks before the Iowa caucuses the web traffic on the campaign's informational pages rose dramatically, which staffers interpreted as undecided voters looking for substantive information to make a decision.

19. For a discussion of brochureware and early candidate websites, see Foot and Schneider, *Web Campaigning*.
20. In *Web Campaigning*, Foot and Schneider document the evolution of candidate web pages and the practices behind them, from speaking to undecided voters to mobilizing supporters.
21. Kreiss, "Taking Our Country Back?"
22. Howard, *New Media Campaigns and the Managed Citizen*. Howard chronicles the structure and work of what he describes as the "e-politics" community of professional political consultants trading in data and "narrowcasting" persuasive communications. Howard conducted his ethnographic work before the 2003–2004 electoral cycle, when a new group of staffers entered politics for the first time and crafted qualitatively different online campaign practices. For example, Vaccari shows how networked technologies supported offline mobilization during the 2003–2004 elections, a fundamentally different mode of campaigning than the one-way, targeted communications model; Vaccari, "From the Air to the Ground." To be sure, the Dean and Obama campaigns still used "narrowcasting" (as is clear in the targeted e-mails and online advertising), but largely developed them in house and did not turn to this e-politics group of consultants.
23. An exception was Gore's presidential campaign. Staffers cite that, in keeping with his policy interests, Gore had a commitment to using new technologies in his campaign.
24. Nicco Mele, personal communication, July 29, 2008.
25. Mele's work at Common Cause provided him with the opportunity to meet much of McCain's Internet staff. Mele cites both watching the McCain campaign closely and having a close relationship with Max Fose, McCain's Internet director.
26. For the literature on political consultants, see Blumenthal, *The Permanent Campaign*; Dulio, *For Better or For Worse*; Farrell, Kolodny, and Medvic, "Parties and Campaign Professionals in a Digital Age"; Gibson and Rommele, "Changing Campaign Communications"; Johnson, *No Place for Amateurs*; Mancini, "New Frontiers in Political Professionalism"; Medvic, "Professional Political Consultants"; Nimmo, *Political Persuaders*; Plasser, "Parties' Diminishing Relevance for Campaign Professionals"; Sabato, *The Rise of Political Consultants*; and Thurber and Nelson, *Campaign Warriors*. To date, there have been only a few works explicitly focused on new media campaign consultants and staffers. See Howard, *New Media Campaigns*; Johnson, *Campaigning in the 21st Century*; Karlson, "Fear the Political Consultant"; Sabato, *The Year of Obama*; and Tatarchevskiy, "The 'Popular' Culture of Internet Activism." Howard explicitly refers to the "e-politics" consultants as "professionals." However, as I extensively document below, the practitioner community that emerged after the 2004 elections differed significantly from this e-politics group with respect to its explicitly partisan orientation and new practices, technologies, and skill sets.

Throughout this book, I use the term "practitioners" instead of "professionals" to refer to the individuals who work with new media on political campaigns. (Following the literature cited above, I at times use the term "professional" when referring to other areas of campaign practice, such as fund-raising and communications, even though as Nielsen notes in *Ground Wars* there is at best uneven professionalism within campaigns.) I do so because most of the Internet staffers who worked in new media in 2004 on the Dean and Clark campaigns came from outside electoral politics. As the book shows, even as many of the staffers active during the 2004 cycle stayed in politics through subsequent electoral cycles, there was still a considerable number of new entrants in 2008. Staffers responsible for hiring, including veterans of campaign new media work, even stated that they looked explicitly for people outside politics in the hopes of being innovative. All of this suggests that new media campaign staffers are engaged in what Grossmann calls an ongoing "professionalizing project" across a host of

different organizations, from consultancies and training organizations to the Democratic Party; Grossmann, “Going Pro:.” However, there is still a marked openness to outsiders. This is in direct contrast to accounts that presume a static “profession” of new media campaign workers.

27. For a discussion of innovation arising from uncertainty, heterogeneous logics, and organizational arrangements that foster creative recombinations of ideas, practices, and technologies, see Stark, *The Sense of Dissonance*. Chadwick also had the insight that campaigns and parties will “develop subunits that exhibit social movement style digital network repertoires but such subunits are sealed off from the main campaign decision makers, or are strategically channeled toward specific societal groups perceived as receptive to looser forms of political engagement”; Chadwick, “Digital Network Repertoires,” 297.
28. For a discussion of the technological vision of the campaign as an inspiration for its staffers, see Streeker and Teachout, “Theories; Technology, the Grassroots, and Network Generativity.”
29. Kevin Thurman, personal communication, July 16, 2011.
30. Mele, personal communication, July 29, 2008.
31. Chen, *Enabling Creative Chaos*. For other work on Burning Man, see Turner, “Burning Man at Google.”
32. Chen, *Enabling Creative Chaos*, 21. For a discussion of hybridity in the political domain, see Chadwick, “Digital Network Repertoires and Organizational Hybridity.”
33. Campaigns have increasingly invested in canvassing and field operations over the last decade in the face of diminishing returns from mediated communication, although they are often reliant on civil society actors to compensate for diminished party infrastructures and attachments among the electorate; Nielsen, *Ground Wars*. The Internet offered a new vehicle for candidate-centric electoral mobilization in the wake of larger shifts away from party-based political forms. For works on changes in the nature of electoral participation, see Polsby, *The Consequences of Party Reform*; and Rosenstone and Hansen, *Mobilization, Participation, and Democracy in America*.
34. For an excellent overview of field campaigns and the “assemblages” that constitute them, see Nielsen, *Ground Wars*.
35. See Norman, *The Design of Everyday Things*. On delegation, see Latour, “Where Are the Missing Masses?”
36. For more on the limits of interactivity and the lack of policy participation on the Dean campaign, see Haas, “Subject to the System”; Hindman, “The Real Lessons of Howard Dean”; Hindman, *The Myth of Digital Democracy*; and Stromer-Galley and Baker, “Joy and Sorrow of Interactivity on the Campaign Trail.” This is not to say that the campaign did not create and adopt an extraordinary range of tools that supporters could use for their own ends, such as DeanSpace. For perspectives on how design structures social action, see Woolgar, “Configuring the User.”
37. Andrew Bleeker, personal communication, June 30, 2010.
38. A number of firms and staffers also came out of the various “Draft Clark” efforts and the retired general’s campaign, which were also technically innovative; see Feld and Wilcox, *Netroots Rising*. Brent Blackaby and Larry Huynh, former Silicon Valley executives who founded DraftClark2004.com, started Blackrock Associates, a digital political consulting firm now part of Trilogy Interactive, after the campaign. Lowell Feld was also active in the Draft Clark efforts and became a prominent political consultant. Matt Stoller worked on ClarkSphere and later went on to work as a political consultant for Connecticut U.S. Senate candidate Ned Lamont’s 2006 campaign and became the president of BlogPac, an organization that supports progressive political activists. For a review of the subsequent work of Dean staffers, see “On the Download,” *National Journal*.
39. Star, “The Ethnography of Infrastructure,” 377.
40. Lievrouw and Livingstone approach new media as a set of technologies, practices, and social organization in their edited volume; Lievrouw and Livingstone, *Handbook of New Media*.
41. For a rich historical discussion of parties as infrastructure for electoral politics, and the far greater success of Republicans in party-building, see Galvin, *Presidential Party Building*.

42. Shirky, *Here Comes Everybody*. See also, Harris, Moffitt, and Squires, *The Obama Effect*.
43. Polletta, *It Was Like a Fever*.
44. For an extensive discussion of the Dean campaign's complex deployment of the "open source" metaphor, see Kreiss, "Open Source."
45. For work on the cultural performances of the Obama campaign, see Brown, "Conjuring Unity"; and Ivie and Giner, "American Exceptionalism in a Democratic Idiom."
46. While there is a lack of works on the building of infrastructure, a number of scholars document its importance. Aldrich argues that parties have not declined, but have transformed into "parties-in-service" to political candidates since the nominating reforms of the 1960s. These services include fund-raising (particularly for down-ballot candidates), staffers, consultants, and technologies such as voter files and targeting practices; Aldrich, *Why Parties?*. Nielsen documents the importance and processes of building party infrastructure, such as voter files, and the limits of the parties' capacities to conduct coordinated and sustained field campaigns; Nielsen, *Ground Wars*.
47. For more details on the renewed importance of field campaigns, see Nielsen, *Ground Wars*.
48. In 2011, VAN merged with NGP, another Democratic political technology firm, to form NGP-VAN.
49. A "club good" is a good that many can enjoy but that can be excludable. In this sense, BSD, the private owners, managed its platform in a way that defined the "club" as Democratic-allied organizations and excluded non-ideologically aligned groups. Investments in the good benefited all members of the club; for an extensive discussion of club goods, see Cornes and Sandler, *The Theory of Externalities, Public Goods, and Club Goods*.
50. Joe Rospars, personal communication, May 19, 2010.
51. The New Organizing Institute was founded by Judith Freeman and two veterans of the Dean and Kerry campaigns, Amanda Michel and Zack Exley, whose work is detailed in later chapters.
52. For additional discussion of the role of organizations such as NOI in formalizing campaign practice and tools, see Karpf, *The MoveOn Effect*.
53. Jascha Franklin-Hodge, personal communication, December 22, 2008.
54. Thurman, personal communication, June 16, 2011.
55. John, *Spreading the News*, 11.
56. Nye, *American Technological Sublime*.
57. O'Reilly, "Google, WalMart, and My.BarackObama.com"; and Mumford, *Technics and Human Development*.
58. Talbot, "How Obama 'Really' Did It."
59. Foot and Schneider argue that there is a "mutual shaping" process whereby tools, online organizing practices, and the practices of larger campaign organizations shape one another; Foot and Schneider, *Web Campaigning*, 18.
60. Plouffe, *The Audacity to Win*.
61. Many scholars have documented the technologies of the Obama campaign, but in being bound by the election cycle have missed their historical origins. For example, see Burch, "Can the New Commander in Chief Sustain His All-Volunteer Standing Army?"; Carty, *Wired and Mobilizing*; Johnson, *Campaigning in the 21st Century*; and Levenshus, "Online Relationship Management in a Presidential Campaign."
62. Nielsen shows how formal, bureaucratic structures help organizations overcome many problems caused by the lowered information costs of political participation; Nielsen, "The Labors of Internet-Assisted Activism." As the following discussion suggests, the planning conducted by the campaign's senior leadership and Rospars helped staffers overcome the problems of "over-communication, mis-communication, and communication overload" that Nielsen identifies.
63. For a post-campaign retrospective of where this integration failed, see Romano, "Yes We Can (Can't We?)."
64. Chris Hughes, personal communication, July 20, 2010.

65. Ibid.
66. Obama “won” Iowa and South Carolina; Clinton “won” New Hampshire and Nevada. However, “won” is a problematic concept for understanding the primaries, as these campaigns ultimately competed for delegates, not the popular vote. Obama, for instance, lost the popular vote but netted more delegates than Clinton in Nevada.
67. Neil Sroka, personal communication, December 22, 2008. Sutton was Hughes’s deputy.
68. Slaby, personal communication, August 16, 2010.
69. Franklin-Hodge, personal communication, December 22, 2008.
70. A/B testing is a quintessential “control” technology in being probabilistic, not deterministic; Beniger, *The Control Revolution*.
71. Documentation of and concerns over targeting have long been a staple of the literature on new media campaigns. See Bennett, “Engineering Consent”; Carty, *Wired and Mobilizing*; Howard, *New Media Campaigns*; and Kreiss and Howard, “New Challenges to Political Privacy.”
72. For an analysis of the ways that computation has transformed the internal workings of organizations, see Kallinikos, *The Consequences of Information*.
73. Kenski, Hardy, and Jamieson show that the Obama campaign (like most campaigns) devoted the vast majority of its resources to television advertising; Kenski, Hardy, and Jamieson, *The Obama Victory*.
74. A number of scholars have looked at the rhetoric, narratives, and performances of the Obama campaign. See Ganz, “Organizing Obama”; and Alexander, *The Performance of Politics*.
75. Scholars of social movements have long noted that cultural processes help give rise to and shape collective action. See Benford and Snow, “Framing Processes and Social Movements”; and Gould, *Moving Politics*.
76. For a detailed argument about design, content, and the negotiation of meaning between users and designers online, see Livingstone, “The Challenge of Engaging Youth Online.” The most extensive statement on the symbolic affordances of design in the context of politics comes from Chadwick, “The Electronic Face of Government in the Internet Age.”
77. Scott Thomas, personal communication, August 3, 2010.
78. For an excellent history of design in electoral politics and an analysis of the Obama campaign’s design as well as the role of artists such as Shepard Fairey in framing the campaign as a cause, see Seidman, “Barack Obama’s 2008 Campaign for the Presidency and Visual Design.” For a collection of the campaign’s design work, see Thomas, *Designing Obama*.
79. For a rich discussion of political advertising that goes beyond content to include symbolic and production practices, see Kaid and Johnston, *Videostyle*.
80. Gould, *Moving Politics*.
81. Thomas, personal communication, August 3, 2010.
82. The targets were both supporters and the staffers themselves who have to “drink their own Kool-Aid” to get through working 20-hour days for over a year; Slaby, personal communication, August 18, 2010.
83. See Skocpol, *Diminished Democracy*; and “United States.”
84. Agre, “Real-time Politics.”
85. See Coleman, “The Lonely Citizen,” for arguments about the potential of new media to foster more robust political representation.
86. It is fundamentally an agonistic view of politics; see Mouffe, *Dimensions of Radical Democracy*.
87. Alexander, *The Performance of Politics*. See also Green, *The Eyes of the People*.
88. See Pateman, *Participation and Democratic Theory*.
89. I thank Richard John for this insight.
90. See Polsby, *The Consequences of Party Reform*; and Cohen, Karol, Noel, and Zaller, *The Party Decides*.
91. Howard, *New Media Campaigns*; and Kreiss and Howard, “New Challenges to Political Privacy.”
92. Goff, personal communication, July 6, 2010.
93. Ibid.
94. These tools served as what Turner describes as “network forums” in *From Counterculture to Cyberculture*. These forums allowed aggrieved supporters from multiple communities to

find and make themselves visible to one another, hone a sense of collective identity, plan and coordinate challenges to the campaign, and take the fund-raising and publicity actions that drew attention to the protest.

95. Hirschman, *Exit, Voice, and Loyalty*. Ultimately there are few opportunities to exit in American electoral politics by backing an alternative candidate, especially during a general election which lacks the alternatives of primaries—except, of course, by not voting.
96. For a detailed discussion of the interviews conducted with Dean campaign staffers, see Kreiss “Taking Our Country Back?”. For the Obama campaign, see Kreiss, “Acting in the Public Sphere.”
97. The GWU Democracy in Action database is available online at: <http://www.gwu.edu/~action>.

## Chapter 2

1. For campaign archives of this time period, see the Howard Dean 2004 weblog at: [http://dean2004.blogspot.com/2003\\_03\\_01\\_archive.html](http://dean2004.blogspot.com/2003_03_01_archive.html); and Dean Call to Action weblog at: [http://www.deancalltoaction.blogspot.com/2003\\_03\\_30\\_deancalltoaction\\_archive.html#91851410](http://www.deancalltoaction.blogspot.com/2003_03_30_deancalltoaction_archive.html#91851410). For records on the first quarter fund-raising in the presidential primaries of 2003, see the George Washington University’s Democracy in Action page at: <http://www.gwu.edu/~action/2004/money/1stq03summary.html>.
2. Kreiss, “Open Source as Practice and Ideology.”
3. Trippi, “The Perfect Storm.”
4. In a highly publicized series of studies, Heaney and Rojas show how the fortunes and strength of the anti-war movement over the last decade rose and fell with the dynamics of partisan mobilization. Democrats protested against the Iraq War to contest Republican leadership, but left the movement in droves once Obama was elected. Dean’s campaign served as an early vehicle for this electoral mobilization, which shifted to Kerry once he became the nominee. Heaney and Rojas, “Partisans, Nonpartisans, and the Antiwar Movement in the United States”; and “The Partisan Dynamics of Contention.” For a review of the interplay between elections and social movements, see McAdam and Tarrow, “Ballots and Barricades.” For a discussion of the netroots’s attraction to Dean, see Farrell, “Bloggers and Parties.”
5. Armstrong, “How a Blogger and the Dean Campaign Discovered Each Other,” 44.
6. For a more detailed account, see Trippi, *The Revolution Will Not Be Televised*.
7. Jerome Armstrong, personal communication, November 21, 2008.
8. For the dynamics of network forums, see Turner, *From Counterculture to Cyberculture*.
9. For an account, see Armstrong, “The Journey with Trippi, Dean, and DFA.”
10. Bobby Clark, personal communication, June 23, 2010.
11. Michael Silberman, personal communication, July 28, 2008.
12. Ibid.
13. Silberman argues that the Meetup organizers were demographically mixed in terms of age but not geography (as detailed below, this was because of the campaign’s lack of supporters in the Great Plains states); Ibid.
14. Ibid.
15. Zephyr Teachout, personal communication, July 10, 2008.
16. Video of the speech is archived at: <http://www.archive.org/details/dean-sacramento>.
17. This is often a self-perpetuating cycle: journalists look to fund-raising and poll numbers to determine where to allocate coverage, while candidates find it difficult to gain either without press coverage. For a discussion of the dynamics of primary campaigns, see Aldrich, “The Invisible Primary and its Effects on Democratic Choice.”
18. Mele, “A Web Activist Finds Dean,” 185.
19. Teachout, personal communication, July 10, 2008.