

Inside Elections

with

Nathan L. Gonzales

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Montana Senate: Brawl in Big Sky Country

By Jacob Rubashkin

Less than two weeks ago, the Montana Senate race was nearly as big of a national story as the coronavirus. But the world, and the news, has completely changed.

For nearly a year, Republicans figured they had dodged a Bullock when the popular two-term governor decided to pursue a longshot bid for president rather than run for Senate.

And for nearly as long, Steve Bullock denied any interest or intention for a Senate run, even as his presidential campaign fizzled out in the fall.

But following a full court press by the Democratic Party's top leadership, and on the heels of a whirlwind two weeks that saw Joe Biden overtake Bernie Sanders as the prohibitive frontrunner for the Democratic presidential nomination, Bullock reversed course and announced he *would* run for the seat, just before the filing deadline.

Bullock is the only Democrat who could give GOP Sen. Steve Daines a serious challenge. Up until last week, he was one of the national party's greatest recruitment disappointments, which also include Stacey Abrams in Georgia. Now that he's officially declared, this has become a real race, and one worth watching.

Democrats now have a slightly wider path to the Senate majority. They need to net at least three seats if a Democrat wins the White House, or four seats if President Donald Trump wins re-election. Competing in Montana gives them an additional opportunity to do so.

Crucially, a competitive Montana race puts Republicans, already stretched thin nationwide, even more on the defensive. The GOP is already facing competitive contests in nine other seats, and only has two real pickup opportunities: Alabama and Michigan. Montana will now suck away valuable resources from those other races.

The Lay of the Land

At the presidential level, Montana has been a reliably red state for 70 years. It has voted for a Democratic presidential candidate just twice since 1948: Lyndon B. Johnson in 1964, and Bill Clinton in 1992 (Clinton received 38 percent to President George H.W. Bush's 35 percent and independent Ross Perot's 26 percent). In 2008, Barack Obama came within three points of winning, but any Democratic resurgence was short lived. Obama lost the state by 14 points in 2012, and Hillary Clinton lost by 21 points in 2016.

In non-presidential races, Montana has been more comfortable voting for Democrats. In 2012, as Obama was losing by double digits, Bullock won his first race for governor by 2 points, Sen. Jon Tester won his second term in the Senate by 4 points, and Democratic candidates for

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2020 Senate Ratings

Toss-Up

Gardner (R-Colo.)

Tillis (R-N.C.)

McSally (R-Ariz.)

Tilt Democratic

Tilt Republican

Collins (R-Maine)

Lean Democratic

Lean Republican

Peters (D-Mich.)

KS Open (Roberts, R)

Daines (R-Mont.)

Ernst (R-Iowa)

Jones (D-Ala.)

Likely Democratic

Likely Republican

Shaheen (D-N.H.)

Cornyn (R-Texas)

Loeffler (R-Ga.)

Perdue (R-Ga.)

Solid Democratic

Solid Republican

NM Open (Udall, D)

TN Open (Alexander, R)

Booker (D-N.J.)

WY Open (Enzi, R)

Coons (D-Del.)

Cassidy (R-La.)

Durbin (D-Ill.)

Capito (R-W.Va.)

Markey (D-Mass.)

Cotton (R-Ark.)

Merkley (D-Ore.)

Graham (R-S.C.)

Reed (D-R.I.)

Hyde-Smith (R-Miss.)

Smith (D-Minn.)

Inhofe (R-Okla.)

Warner (D-Va.)

McConnell (R-Ky.)

Risch (R-Idaho)

Rounds (R-S.D.)

116th Congress

	GOP	DEM
116th Congress	53	47
Not up this cycle	30	35
Currently Solid	13	9
Competitive	10	3

Sasse (R-Neb.)

Sullivan (R-Alaska)

Takeovers in *Italics*, # moved benefiting Democrats, * moved benefiting Republicans

California House Races Shift to General Election

By Jacob Rubashkin

In 2018, the path to the Democratic House majority ran through California, where Democrats flipped seven long-time GOP districts. If Republicans want any chance of taking back control of the House, they'll have to win at least some of them back in November.

In 2020, California will play host to several marquee House contests featuring some of the best fundraisers from each party. But veteran California campaign operatives from both parties agree that as long as Trump is at the top of the ticket, it will be very difficult for Republican challengers to make the GOP case effectively. The president is historically unpopular; he lost the state by 30 points in 2016. And now that it's increasingly likely the Democratic nominee for president will be a more palatable Joe Biden, not democratic socialist Bernie Sanders, Republican House candidates could be facing an even steeper loss at the top of the ticket in 2020.

Republicans haven't flipped a California seat in two decades, and it's not clear if that will change this year.

California's elections are unique. Instead of each party holding its own primary, all candidates from all parties appear on the same ballot in a "top-two primary", and the top two vote getters, regardless of party or margin of victory, advance to the general election in November.

Here are nine races to watch in the Golden State, including the state's most competitive districts and open seats in solid districts that will elect new Members of Congress.

8th District (Northern San Bernardino County and the High Desert) Paul Cook, R, not seeking re-election. Trump 55%. This is a safely Republican seat — so safe, in fact, that in 2018 the top two House candidates were both Republicans, the only district in California where a Democrat failed to make the general election in November. And in 2018, even as Democrat Gavin Newsom was winning the gubernatorial election by a statewide margin of 23 percent, he lost the 8th District by 19 percent.

With four-term GOP Rep. Paul Cook retiring, the Republican field was more fractured than in 2018, so the 2020 general election will be a more traditional Republican vs. Democrat matchup. The Republican, and prohibitive favorite, is state Assemblyman Jay Obernolte, who represents the High Desert area in the state legislature and took 35 percent in the

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Candidate Conversation



Bill Clark/CO Roll Call

Lisa Song Sutton (R)

Nevada's 4th District — Rating: Solid Democratic

Interview Date: March 2, 2020

Date of Birth: March 11, 1985; Seoul, South Korea

Education: Univ. of Arizona (2006); Univ. of Miami (J.D. 2009)

Elected Office: None

Current Outlook: Song Sutton is headed toward a competitive June 9 primary against former state Assemblyman Jim Marchant, and veteran Sam Peters. The winner will face a steep climb against Democratic Rep. Steven Horsford, who had more than \$1 million on hand on Dec. 31 and represents a district that voted for Hillary Clinton by 5 points in 2016. Song Sutton, Marchant, and Peters all had around \$200,000 at the end of the year.

Evaluation: Song Sutton is in many ways emblematic of this northern Las Vegas district. A former Miss Nevada USA, Song Sutton grew up in a military home, modeled through college before getting her law degree, and has founded four successful businesses over the past decade that range from a Christie's luxury real estate affiliate to an alcohol-infused cupcake company. A lifelong Republican, Song Sutton is a political neophyte. She didn't cast a ballot in the 2016 primary or general, and was spurred to run for office by the poor conditions she saw in the community when she opened a shipping business near Nellis Air Force Base in 2018. But while she spoke passionately about local issues, she was less certain on national issues such as immigration reform, impeachment, and the then-brewing coronavirus outbreak.

There's a striking contrast between the way Song Sutton talked about her experience in the district, where she stressed her non-profit work and relationships with typically Democratic voting groups, and how she is styling herself on the national stage. Within the district, she pointed to Marchant's pledge to join the conservative/libertarian Freedom Caucus as a major difference between the two of them (she would not make that pledge), and she disagrees with the president's tweeting. But her website and social media tout Fox News appearances and Daily Wire clippings, and cast her as a conservative foil to Rep. Alexandria Ocasio-Cortez. She'll need to channel that branding into more national dollars and earned media if she wants to edge out Peters and the more established Marchant, and then hope she can fall back on her district ties and more apolitical disposition to have a chance in a district where President Donald Trump is likely to lose.



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primary. Obernolte, who scored a coveted endorsement from President Donald Trump last month, is a video game developer who spent \$650,000 of his own money in the primary.

He'll face Democrat Chris Bubser, an engineer-turned-biotech-adviser who came in second with 29 percent. Bubser, who hopes to take advantage of Republicans' declining voter registration edge in the district, as well as the significant Latino population, had just \$126,000 on hand heading into the general election, and she starts as a significant underdog. But, as *Inside Elections* noted in a recent Candidate Conversation, Bubser is a "credible candidate putting together a serious campaign ... in place to take advantage of an unexpected opportunity." With an increasingly volatile economy and spreading coronavirus pandemic, it's important for parties to have legitimate candidates in as many races as possible. For now, though, this race is Obernolte's to lose. Current rating: *Solid Republican*.

10th District (Modesto area) Josh Harder, D, elected 52%. Clinton 49%. In 2018, Republican Ted Howze ran an insurgent campaign against then-Rep. Jeff Denham, a four-term GOP incumbent. In a surprise, he almost won a spot in the general election, just barely falling short of second place to Democrat Josh Harder. Two years later, Howze is the Republican establishment and Denham-endorsed pick to take on Harder, who went on to defeat Denham in 2018. In the primary this month, Howze secured a spot in the general election with 35 percent, while Harder received 44 percent.

This race is not a top Republican priority in the state. Some Republicans are excited about Howze, who has an interesting backstory as a large animal veterinarian, and his ability to put personal money into his campaign. He has already contributed \$600,000 and could pour in up to \$2 million of his own wealth over the course of the cycle. But that still puts him at a steep financial disadvantage to Harder, who had \$2.8 million on hand on February 12 and is expected to raise several million more before November.

Democrats are skeptical that Howze will catch on among voters, pointing to his residency issues — he has a house in a gated community outside the district — and his hardline stance on immigration in a district that is 40 percent Hispanic. Harder, meanwhile, has won the confidence of Democrats previously skeptical about how he fit the district; several strategists point to his recent viral Congressional hearing moment featuring a taxidermied swamp rat (the scourge of the district), and the subsequent passage of Harder's legislation to eradicate the unpopular animal, as evidence that he has hit his Central Valley stride. Current rating: *Likely Democratic*.

21st District (Southern Central Valley and part of Bakersfield) TJ Cox, D, elected 50%. Clinton 55%. This was one of the unlikeliest flips of the 2018 midterms, and was even called for the Republican incumbent by the AP and others on election night. But when all the votes were counted, Democrat TJ Cox eked out a narrow victory over Rep. David Valadao, who is running again for his old seat.

Of all the seats Democrats flipped in 2018, the 21st District is the most vulnerable. Republicans are confident that the 2018 result was a fluke, and believe Valadao has the inside track in this 2020 rematch. Democrats are circumspect about Cox's standing in the district, with one veteran operative describing him as "the kind of representative you get in a wave year."

Cox has also come under fire recently for his financial history — two former business associates recently sued him for fraud (Cox points

out that Valadao has a similarly checkered financial past, also having been sued for failing to repay investors). Republicans are confident they will be able to sink Cox due to his financial issues, but in this low-information, low-turnout district where just 9 percent of residents have college degrees, it's going to take time and money to inform the electorate.

Valadao came in first in the all-party primary, with 51 percent of the vote. And Cox (38 percent) barely overperformed his 2018 primary total, despite being an incumbent.

But California primary electorates tend to be more friendly to Republicans than the general election. Case in point, in 2018 Valadao won almost 63 percent of the primary vote before losing to Cox by less than a percentage point in November.

This race looks neck and neck, but now that Valadao's ability to win blue districts has been shown to have its limits, Republicans won't be able to count on it as a sure pickup. This is a district that otherwise votes for Democrats across the board. Now it has a Democratic congressman to vote for as well, and Valadao will be facing strong headwinds from the top of the ticket, where Trump is likely to lose this district by double-digits.

This is Democrats' most vulnerable California seat. That Cox is still the slightest of favorites is a sign of just how tough the state is for the GOP. Current rating: *Tilt Democratic*.

25th District (Northern Los Angeles County suburbs) Vacant, D. Clinton 50%. Special Election: May 12 runoff. Voters in the 25th District actually voted in two congressional races on Super Tuesday: a regularly scheduled primary, from which the top two vote-getters will advance to November, and a special election caused by the resignation of freshman Democratic Rep. Katie Hill. If one candidate had received over 50 percent of the vote in the special election, they would have won outright and filled the rest of Hill's term.

This race featured numerous sideshows and a colorful cast of characters. In addition to the salacious origins of the race — Hill's "throuple" relationship that involved an employee of hers — there were fringe figures such as Russiagate bit player George Papadopolous and left-wing media personality Cenk Uygur, as well as an attempted comeback by former GOP Rep. Steve Knight, who lost re-election in 2018.

In the end, voters went with the establishment choices. Democratic state Assemblywoman Christy Smith took first place in both contests,

with 36 percent in the special and 32 in the primary, and Republican former fighter pilot Mike Garcia took second in both, with 25 and 24 percent, respectively.

But the similarities between the two upcoming elections end there. The May 12



Courtesy, Smith for Congress Campaign

Christy Smith

special is going to be a close contest that both California Democrats and Republicans acknowledge could go either way.

The big question mark is the makeup of the electorate that shows up in May. It is a standalone special election, so it will not have higher-profile races to drive turnout. And the ongoing COVID-19

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pandemic creates further uncertainty. If this race sees low-double-digit turnout rates, we could see the district revert to its more conservative fundamentals, benefitting Garcia. And in the Los Angeles media market, it's going to be incredibly expensive for either party to turn out significant numbers of voters for a May special, so the extent to which there is outside support for either candidate, especially given the upcoming election in November, is uncertain.

Hanging over the district is also the scandal that forced the special in the first place, in which then-Rep. Hill was discovered to have engaged in an inappropriate relationship with one of her staffers and was subsequently subject to a revenge porn attack. While it's unclear just how much the former congresswoman's scandal is resting on voters' minds, California Democrats expressed frustration at Hill for maintaining such a prominent presence in the media so soon after her resignation, with

Candidate Conversation



Bill Clark/CQ Roll Call

Sarah Riggs Amico (D)

Georgia Senate —
Rating: Likely Republican

Interview Date: Oct. 16, 2019

Date of Birth: June 21, 1979;
St. Louis, Missouri

Education: Washington & Lee
Univ. (2001); Harvard (MBA,
2003)

Elected Office: None; 2018 candidate for lieutenant governor.

Current Outlook: Amico is locked in a competitive Democratic primary with 6th District special election nominee Jon Ossoff and former Columbus Mayor Teresa Tomlinson that is currently scheduled for May 19. If no Democrat reaches 50 percent, there will be a July 21 runoff. Making that runoff is likely Amico's first goal. The winner will start as an underdog against GOP Sen. David Perdue in the general election.

Evaluation: Even before Georgia's other seat officially came online as a result of GOP Sen. Johnny Isakson's resignation, Amico had been committed to running against Perdue. She believes her business background with the family trucking company is a stark, good contrast to Perdue. Amico guided her company through a bankruptcy, which critics might attack but she'll embrace as the company protected union jobs and benefits. In our interview, Amico walked through her dreams of working for the CIA and FBI before landing at the famous William Morris talent agency, before entering the trucking business. Her star rose in 2018 as the lieutenant governor running mate with Georgia Democrat Stacey Abrams on the ticket that narrowly lost the gubernatorial race (although she doesn't consider 2018 a loss because of Republican Brian Kemp's action to purge old voter lists.) Amico, who is running on economic security and health care, has consistently trailed Ossoff in fundraising and could have to explain to primary voters why she used to be a Republican. In the general election, Amico will be challenging the GOP lean of the state. She's an unapologetic progressive who believes pandering to moderates is not the answer and Democratic values are not radical, even if Democrats haven't won a statewide race in Georgia in more than a decade.

Democratic operatives worrying that she hasn't given Smith's campaign enough room to message effectively.

Republicans, meanwhile, are incredibly excited about Garcia, a Hispanic first-generation American former Navy fighter pilot raised in Santa Clarita, and think his background gives him a leg up in this working class, 35 percent Hispanic district that is home to many firefighters and police officers.

In November, however, the picture shifts considerably. This district went for Hillary Clinton by 7 points in 2016, and has been trending more Democratic over the past decade. Since 2012, Democrats have seen a 10 point net swing in voter registration advantage, going from -4 to +6 in the district. Democrats expect to see much higher numbers of low-propensity voters, Latinos, and no-party-preference voters turn out in November for the presidential election, and expect Smith to overperform among those groups. Democrats further point to Hill's 9-point victory in 2018 to show that this district is fast becoming less than competitive in a normal election cycle.

Even if Garcia does win in May, it's not clear how much advantage he would be able to squeeze out of six months of incumbency, especially in such an expensive media market, and he may even be forced to take unpopular votes in his short time on Capitol Hill. So regardless of the outcome in May, Smith will enter November as the favorite. Current rating for November: *Likely Democratic*.

39th District (San Gabriel Valley and northern Orange County) Gil Cisneros, D, elected 52%. Clinton 52%. Two years after losing a close race to replace retiring GOP Rep. Ed Royce, former Assemblywoman Young Kim is back for a rematch against freshman Rep. Gil Cisneros. Republicans are more optimistic about flipping this San Gabriel Valley district even though Trump performed relatively poorly here, winning just 43 percent in 2016. In this year's primary, Kim took 48.4 percent to Cisneros' 46.8 percent.

Their optimism is largely born out of enthusiasm for Kim, who continues to excite and impress national and state Republican operatives despite her narrow 2018 loss. She's been a figure in local GOP politics for a long time, and California Republicans believe she has been able to develop a Republican brand that predates and is distinct from the president's, even though she lost re-election to the statehouse in 2016 when her opponent tied her to Trump.

Kim is a top fundraiser among Republicans nationwide, and in a rarity for GOP challengers she has outraised her Democratic opponent, though Cisneros, who won \$266 million in the lottery a decade ago, has the ability to spend significant personal money. In 2018, Cisneros spent almost \$10 million of his own money. California Democrats expect him to spend big again if necessary, but there is some consternation within the party that he is not doing enough to raise money from individual donors.

Kim is also a favorite of Republicans because she is a woman of color, and both nationally and in California the Republican Party is in danger of becoming the party of white men. In the House of Representatives this year, there are just thirteen Republican women, two of whom are retiring. There are just five Hispanic GOP House members, one of whom is retiring, and one black GOP House member, also retiring. There are no Asian-American Republicans in Congress. In California, Republicans lag behind Democrats and voters with no party affiliation in statewide voter registration as well as among key minority groups. Only 15 percent of Latinos in California are registered Republicans, and just 18 percent of Asians are.

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Kim, an immigrant from South Korea, would be the first Korean-American woman, Democrat or Republican, to serve in Congress if elected by this district, which is nearly one-third Asian. In 2018, Kim was often cited by national Republicans when confronted by the party's dismal diversity.

It's not clear what has changed significantly in this district from 2018, when Cisneros prevailed over Kim. Cisneros has largely kept his head down, steering clear of controversy or national prominence, and has stuck to the image he first ran on, as a former Republican Navy veteran. Republicans contend that his support for impeachment (Cisneros was one of the seven "national security Democrats" who wrote an op-ed credited with shifting the discourse toward impeachment) and his vote for Nancy Pelosi as Speaker are aspects of his record he did not have to defend in 2018, but will now.

But Trump is just as unpopular here as he was in 2016 and 2018, if not more so. Young Kim may be a good candidate for the GOP, but it's not evident that she's good enough to outrun the president enough to win this district. Current Rating: *Likely Democratic*.

45th District (Irvine area of Orange County) Katie Porter, D, elected 52%. Clinton 49.8%. California's 45th is one of Republicans' glaring recruitment holes this cycle, evidenced by freshman Rep. Katie Porter capturing over 50 percent of the vote in the primary against multiple Republican opponents. Porter is a protégé and former student of Elizabeth Warren who has become a favorite of progressives nationwide for her incisive questions at congressional hearings, and this district is located in traditionally Republican Orange County. One Republican strategist noted that on paper, Porter "couldn't be less of a fit for the district."

And yet Porter, whose 4-point victory over GOP Rep. Mimi Walters in 2018 took over a week to call, remains a heavy favorite to keep her seat. Democrats and Republicans alike say that Porter's authenticity and plainspokenness has earned her significant respect in the district despite the ideological mismatch. Republicans failed to coax any substantive challengers into the race, and this race is falling fast on national groups' priority lists.

Last year, some GOP strategists had high hopes for Yorba Linda City Councilwoman Peggy Huang, but she never raised much money and finished fourth in the primary with 11 percent. The top-fundraising Republican challenger, former Laguna Hills mayor Don Sedgwick, placed third and missed the general election in November. Instead, Porter will face Mission Viejo City Councilman Greg Raths, who received just 18 percent of the primary vote. Raths, a retired US Marine, is not thought of highly as a candidate by either Democratic or Republican insiders, and this race becomes less competitive by the day.

Orange County, the birthplace of former California Senator / President Richard Nixon and where Ronald Reagan once said "good Republicans go to die," was ground zero for the GOP's suburban wipeout in 2018. The 45th District was one of four Republican seats in the OC that flipped in the midterms, giving Democrats a 7-0 sweep of the county's congressional delegation. These are districts that swung hard for Clinton in 2016 — Clinton improved on Barack Obama's 2012 mark in California's 45th by almost 7 percent. With Trump at the top of the ticket, districts such as the 45th will be heavy lifts for California Republicans — especially now that they likely won't have Bernie Sanders to run against as the Democratic nominee.

Letting aside Republicans' recruitment woes, Porter has proven herself a phenomenal fundraiser, raising almost \$4 million this cycle, over \$3

million of which she had on hand as of February 12. That makes her the second-highest fundraiser among the freshman Democratic class, second only to Rep. Alexandria Ocasio-Cortez. Current rating: *Likely Democratic*.

48th District (Coastal Orange County) Harley Rouda, D, elected 54%. Clinton 48%. Michelle Steel, the Orange County supervisor

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2020 House Ratings

Toss-Up (2R, 7D)

GA 7 (Open; Woodall, R)	NY 11 (Rose, D)
IA 3 (Axne, D)	NY 22 (Brindisi, D)
IL 13 (Davis, R)	OK 5 (Horn, D)
IL 14 (Underwood, D)	SC 1 (Cunningham, D)
	UT 4 (McAdams, D)

Tilt Democratic (9D)

CA 21 (Cox, D)
GA 6 (McBath, D)
IA 1 (Finkenauer, D)
IA 2 (Open; Loebbeck, D)
ME 2 (Golden, D)
MN 7 (Peterson, DFL)
NJ 3 (Kim, D)
NM 2 (Torres Small, D)
VA 7 (Spanberger, D)

Tilt Republican (7R, 1I)

IA 4 (King, R)
MI 3 (Amash, I)
MN 1 (Hagedorn, R)
NJ 2 (Van Drew, R)
PA 1 (Fitzpatrick, R)
PA 10 (Perry, R)
TX 22 (Open; Olson, R)
TX 24 (Open; Marchant, R)

	GOP	DEM
116th Congress	200	234
Currently Solid	170	199
Competitive	30	35
Needed for majority	218	

Lean Democratic (7D, 1R)

CA 48 (Rouda, D)
KS 3 (Davids, D)
NJ 7 (Malinowski, D)
NV 3 (Lee, D)
TX 7 (Fletcher, D)
TX 23 (Open; Hurd, R)
TX 32 (Allred, D)
VA 2 (Luria, D)

Lean Republican (5R)

MO 2 (Wagner, R)
NE 2 (Bacon, R)
NY 2 (Open; King, R)
NY 24 (Katko, R)
OH 1 (Chabot, R)

Likely Democratic (12D, 2R)

AZ 1 (O'Halleran, D)	PA 17 (Lamb, D)
CA 10 (Harder, D)	
CA 25 (Vacant, D)	
CA 39 (Cisneros, D)	
CA 45 (Porter, D)	
FL 26 (Mucarsel-Powell, D)	
NH 1 (Pappas, D)	
MI 8 (Slotkin, D)	
MI 11 (Stevens, D)	
NC 2 (Open; Holding, R)	
NC 6 (Open; Walker, R)	
NY 19 (Delgado, D)	
PA 8 (Cartwright, D)	

Likely Republican (13R)

AZ 6 (Schweikert, R)
FL 15 (Spano, R)
IN 5 (Open; Brooks, R)
MI 6 (Upton, R)
NC 8 (Hudson, R)
NC 9 (Bishop, R)
NY 1 (Zeldin, R)
OH 12 (Balderson, R)
TX2 (Crenshaw, R)
TX 10 (McCaul, R)
TX 21 (Roy, R)
TX 31 (Carter, R)
WA 3 (Herrera-Beutler, R)

moved benefiting Democrats, * moved benefiting Republicans Takeovers in Italics

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who took 35 percent of the primary vote, is one of the most heralded GOP recruits in the country, exciting Republicans in Washington and impressing operatives on the ground in California. Her connections within the party go back for decades, and between her and her husband — the former chairman of the California GOP — she has the network and resources to mount a strong challenge to freshman Rep. Harley Rouda, who received 47 percent in the primary.

Like Young Kim in the 39th District, Steel is an immigrant from South Korea, and is mentioned often by Republicans as a recruiting coup for a party struggling with demographic trends. If the California and national GOP want to reverse their alarming slide among Latino and Asian voters and women, they'll need to seek out and support more candidates like Steel.

Rouda, who came into office with a reputation as a moderate, has kept a lower national profile than some of his fellow House freshmen. Democrats think this is to his advantage, because this is still a conservative-leaning district. They believe that Rouda's image as a "boring former Republican businessman," to quote one California Democrat, makes him a perfect fit for the district. Republicans argue the opposite, saying that he's been so low-profile that voters don't know who he is or feel any loyalty to him, and that his past support for "Medicare-for-All" will be a serious liability for him (though Rouda has been on record supporting a version of Medicare-for-All since before he won election in 2018).

The 48th District was the closest Orange County district in 2016, with Clinton barely edging out Trump by just 1 point, and it is one of Republicans' best pickup opportunities in Southern California. But as is the story with so many suburban districts, a fundraising advantage and the ability to run against the unpopular Trump keeps this in the Democratic column for now. Current rating: *Lean Democratic*.

50th District (Inland San Diego County) Vacant, R. Trump 55%. With former congressman and current felon Duncan Hunter, Jr. having resigned and not seeking re-election, and 2018 Democratic nominee Ammar Campa-Najjar as the only serious candidate from his party, the real contest in this race was the fight for 2nd place and a GOP spot in the November general election. (This week, Hunter was sentenced to 11 months in prison.)

Former 49th District Rep. Darrell Issa, who retired in 2018 rather than face a difficult re-election, edged out radio host and former San Diego city councilman Carl DeMaio — Issa took 23 percent to DeMaio's 20 percent. This was an ugly race, and Issa took serious flack, even from some Republican allies, for attack ads that harped on DeMaio's sexuality (DeMaio is openly gay).

Democrats know this district is a much heavier lift now that they can't run against the scandal-plagued Hunter. Some strategists watching the race still see a path for Campa-Najjar, who they argue will have the resources to tell his compelling life story. But most Democratic observers are more skeptical, noting that this is a deeply Republican district and that Issa, once the richest member of Congress, will have virtually unlimited funds to spend.

On Super Tuesday, two Democratic candidates combined for 42 percent of the vote. But the clearest indicator of the near-vertical climb Democrats face in the 50th comes from the midterms. In 2018, running against the indicted, scandal-plagued Hunter in a Democratic wave year, Campa-Najjar still fell short. Current Rating: *Solid Republican*.

53rd District (Eastern San Diego) Susan Davis, D, not seeking re-election. Clinton 65%. This safe Democratic open seat is already

home to one of the most expensive House races in the country — and it's all on account of one candidate. Sara Jacobs, a 31-year-old former adviser to the Hillary Clinton campaign who came in third place in the 2018 primary for the southern Orange County 49th District, has already spent almost \$2 million on the race, \$1.5 million of which she personally contributed.

Jacobs, who came in first with 29 percent of the primary vote, also has the backing of the super PAC Forward California, which has spent an additional \$1 million in advertising on the race. Forward California is entirely funded by Jacobs' grandparents, billionaire Qualcomm founder Irwin Jacobs and his wife Joan. It's a financial arrangement that has drawn scrutiny from Jacobs' opponents and progressive groups that advocate for less money in politics.

Jacobs will compete in the November general against San Diego City Council President Georgette Gómez, a Democrat who finished in second with 20 percent.

Gómez, a San Diego native who has served on the council for four years, has been endorsed by a slew of national progressive figures, including DSCC Chairwoman/Nevada Sen. Catherine Cortez Masto, Sen. Bernie Sanders, and Rep. Alexandria Ocasio-Cortez. She also has significant labor support, including the California AFT and SEIU.

Jacobs begins this race as the favorite — her nearly endless financial resources are a boon in this expensive media market. But Gómez shouldn't be counted out. She has the potential to consolidate progressive support from other candidates, and she's running to be the first LGBTQ Latina in Congress in a district that is almost one-third Hispanic. Her ties to organized labor and her roots in the San Diego political community are a strong asset, as is the national network of donors and activists she is linked to through the likes of Sanders and AOC, so this race has potential to attract greater interest from the left wing of the Democratic Party.

There's also the question of the district's Republican voters — Trump won 35 percent of the vote in 2016 — who now have two Democratic choices. This could result in a significant undervote, where Republicans simply leave this race blank on the ballot. Most observers say the candidate more likely to make a play for Republican votes is Jacobs, who by virtue of her wealth is seen as the more "establishment" option.

Jacobs is no centrist; she supports Medicare for All, the Green New Deal, and other progressive priorities. But unlike Gómez, Jacobs would have the additional resources to specifically target Republican and right-leaning independents with tailor-made appeals. For Gómez's part, Democrats involved in the race say she has a good working relationship with the city council's GOP members — she was elected president unanimously — which could help her win some support from the district's Republicans. Current Rating: *Solid Democratic*. **IE**

CALENDAR

July 13-16	Democratic National Convention (Milwaukee)
Aug. 24-27	Republican National Convention (Charlotte)
Sept. 29	First Presidential Debate (Indiana)
Oct. 7	Lone Vice Presidential Debate (Utah)
Oct. 15	Second Presidential Debate (Michigan)
Oct. 22	Third Presidential Debate (Tennessee)

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secretary of state, auditor, and superintendent of public education were all victorious.

In 2016, the Trump wave hit Montana Democrats hard. They lost every statewide election — except for the governor’s race, in which Bullock actually improved on his 2012 margin, beating now-Rep. Greg Gianforte by 4 points.

In 2017, Gianforte beat musician and sub-par candidate Rob Quist by just 5 points in a House special election (Gianforte made national headlines for assaulting a reporter on the eve of that election).

A year later, Gianforte won a closer election against a stronger candidate, winning 50.9 percent against Kathleen Williams’ 46.2 percent. Democrats did score a key Senate victory in the state, with Tester beating back a challenge from state auditor Matt Rosendale by 3.5 points.

The state features a stark geographic divide: the eastern half of the state, bordering the Dakotas, is reliably conservative territory, while the western half, home to the Bozeman and Missoula metro areas, is friendlier to Democrats. Demographically, Montana is overwhelmingly white (89 percent) and has the fifth-highest percentage of Native Americans (6.6 percent) of any state.

The Republican Incumbent

This is the most competitive race first-term Sen. Steve Daines has faced in his career. The 57-year-old Daines, who grew up in Bozeman, has never been in a race decided by fewer than 10 points.

Though born in Van Nuys, California, Daines traces his Montana roots back five generations to his great-great-grandmother. After moving



Steve Daines

Caroline Brehman/CQ Roll Call

with his parents — both of whom grew up in Montana — to Bozeman, Daines graduated from Bozeman High School in 1980, and from Montana State University in 1984, with a Bachelor of Science in engineering.

Following college, Daines worked in management for Procter & Gamble, first for six years in Iowa and then for seven years in Hong Kong and mainland China. In 1997, he moved back to Bozeman to work for his family’s construction business.

In 1999, Daines’ company took a job building a new Bozeman headquarters for the tech firm RightNow Technologies. And in 2000, RightNow founder now-Rep. Greg Gianforte offered him a job as a customer care executive at the firm. Daines eventually became a vice president for sales in North America and then Asia. In 2012, RightNow sold to Oracle for \$1.5 billion and Daines left the company to campaign for the House.

Daines’ first foray in electoral politics came in 2008, when he was selected by GOP gubernatorial candidate Roy Brown as a running mate in the race against Democratic Gov. Brian Schweitzer. Brown and Daines lost that election handily, as Schweitzer won re-election by 30 points.

In 2012, Daines launched a campaign for the open at-large House seat being vacated by Denny Rehberg. In that election, he easily beat Billings state Sen. Kim Gillan by more than 10 points.

After just one term in the House, Daines ran in 2014 for the Senate seat left behind by Democrat Max Baucus, who had been appointed Ambassador to China. Initially, it seemed his Democratic opponent would be John Walsh, the former lieutenant governor who had been appointed to serve out the rest of Baucus’s term. However, a plagiarism scandal derailed Walsh’s candidacy, and he withdrew from the race. Instead, Daines faced little-known 32-year-old state legislator Amanda Curtis. Daines defeated Curtis by almost 18 points, becoming the first Republican to win that Senate seat since 1913.

In the Senate, Daines has generally kept a low profile. He sits on four committees — Finance, Appropriations, Indian Affairs, and Energy and Natural Resources — and is the chairman of the subcommittee on National Parks. According to FiveThirtyEight, he has voted with the president 86 percent of the time since 2017, breaking mainly on issues of sanctions, US military actions in the Middle East, and spending.

Montana Republicans point to Daines’ work on the Conservation, Management, and Recreation Act of 2019, which permanently reauthorized funding for the Land and Water Conservation Fund, a government program which has put hundreds of millions of dollars into Montana since its inception four decades ago. Republicans also note his successful effort to convince the Trump administration to reverse its decision to close the Anaconda, Mont., Job Corps training center in 2019.

MorningConsult found Daines’ approval rating in Montana in the last three months of 2019 to be 47 percent, versus 31 percent disapproval. A February 2020 University of Montana/Big Sky poll found that 43 percent of Montanans rated his performance “excellent” or “good,” while 37 percent rated it “fair” and 20 percent rated it “poor.” And a PPP poll for End Citizens United taken in March pegged Daines’ personal rating at a narrower 45 percent favorable/42 percent unfavorable.

Daines’ campaign is managed by veteran Montana operative Shane Scanlon, who previously served as a spokesman for Gianforte and Rosendale. The campaign team also includes FPI Strategies for media, Campaign Solutions for digital, Arena for direct mail, and Moore Information for polling.

On Dec. 31, Daines reported just over \$5 million cash on hand — for comparison Matt Rosendale raised \$6 million for the entire 2018 cycle.

The Democratic Challenger

Fifty-three year old Gov. Steve Bullock, now serving his second and final term as Montana’s 24th chief executive, was born in Missoula and moved to Helena at the age of four. He graduated Helena High School in 1984, and went on to attend Claremont McKenna College in Claremont, Calif., where he graduated with a Politics, Philosophy, and Economics degree in 1988.

Following a brief stint at a financial firm in Philadelphia, Bullock returned to Montana where he began working for the state Democratic Party, and in 1991 decamped to Columbia Law School in New York, graduating in 1994. After two years at law firms in DC and New York, Bullock returned to Helena in 1996, taking a job with Secretary of State Mike Cooney, who would later serve as Bullock’s lieutenant governor. In 1997, he moved to the office of Attorney General Joe Mazurek, whose campaign Bullock had managed in 1992.

In 2000, Bullock, in his first run for office, sought the Democratic nod for attorney general to succeed Mazurek, and lost in a 40-point landslide to county attorney Mike McGrath.

Following that loss, Bullock moved to Washington, DC, where he

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practiced law at Steptoe and Johnson and taught at George Washington University Law School. In 2004, Bullock moved back to Helena and began his own law practice.

In 2008, Bullock ran again for attorney general. This time, he won a three-way primary with 42 percent of the vote, and received 52 percent of the vote in the general election over Republican Tim Fox.

While attorney general, Bullock made national headlines for defending Montana's hundred-year-old campaign finance law in the wake of the *Citizens United* decision. Bullock took his case, *American Tradition Partnership, Inc. v. Bullock*, all the way to the Supreme Court in 2011, but was dealt a 5-4 defeat by the court's conservative majority.

In 2012, with Gov. Brian Schweitzer term-limited, Bullock ran for governor, winning the Democratic nomination with ease and eking out a narrow, 1.6-point victory over former Rep. Rick Hill.

Bullock fared better in his 2016 re-election campaign against businessman Greg Gianforte, beating Daines' old boss by 4 points even as Republicans swept every other statewide office and the presidency.

In May of 2019, Bullock announced he would compete in the 2020 Democratic presidential primary. Pitching himself as a moderate populist progressive who could win over red state voters, Bullock qualified for just one debate. After failing to exceed 1 percent in national polls, Bullock dropped out of the race in December. He then resisted calls to run for the Senate for another three months before changing his mind and entering the race.

Throughout his time as governor, Bullock has maintained high approval ratings, often ranking among the most popular governors in America. In MorningConsult's fourth-quarter 2019 polling, Bullock had a 52 percent approval rating, paired with a 31 percent disapproval rating. A February University of Montana/Big Sky poll found that 46 percent of Montanans graded his performance as "excellent" or "good," while 33 percent rated it "fair" and 21 percent said "poor." And PPP's mid-March poll for End Citizens United showed Bullock with a 49 percent favorable/40 percent unfavorable rating.

Though Bullock entered the Senate race too late to file a 2019 fourth quarter FEC report, his campaign announced that it had raised \$1.2 million in its first 24 hours.

How it Plays Out

For Republicans, the focus of the campaign will not be Bullock's four years as Montana's attorney general or his eight years as governor. Instead, it will be the six-and-a-half months that Bullock was a candidate for the Democratic nomination for president. Over the course of his campaign, Republicans believe that Bullock showed for the first time his "true" political beliefs, staking out more liberal positions on controversial issues in an attempt to win over national Democratic primary voters.

The number one campaign issue Republicans bring up is guns. Montana is a vast, rural state with high rates of gun ownership — one



Steve Bullock

Tom Williams/CQ Roll Call

2015 study estimated that more than 52 percent of Montanans own a firearm, good for sixth highest among all states. Democrats in Montana tend to tack to the right of their party on firearm issues; Sen. Tester has long opposed increased gun control measures, most recently voting with Republicans against Connecticut Sen. Chris Murphy's 2016 bill to increase background checks.

Bullock initially shared similar positions to Tester on guns, releasing a statement opposing both background checks and an assault weapons ban when he ran for re-election as governor in 2016, after being attacked on the issue by his opponent.

But following the mass shooting at Marjory Stoneman Douglas High School in 2018, which left 17 Florida teenagers dead, and in the lead up to his presidential run, Bullock shifted his position, endorsing universal background checks and a ban on the sale of assault weapons, which he defined as "military, semiautomatic, typically removable clips, a magazine of 10 or more — it's like the AR-15s." In explaining his shift, Bullock drew on both his identity as a gun-owning hunter, and on his experience losing his 11-year-old nephew in a school shooting in 1994.

Bullock's stance is more tempered than some of his Democratic colleagues: he does not support a gun registry or the idea of seizing assault weapons already in private hands. But both national and state Republican strategists are skeptical that any candidate can win Montana with such restrictive positions on guns. Expect to see lots of ads featuring the CNN interview in which Bullock comes out in support of an assault weapons ban, perhaps paired with Beto O'Rourke's, "Hell yes, we're going to take your AR-15," for effect.

The second issue Republicans plan to attack Bullock on is Trump himself. Before and during his presidential run, Bullock trumpeted his ability to win Republican voters, often noting that 25 to 30 percent of his supporters in 2016 were crossover Trump voters. But he also supported the president's impeachment and removal, and as a presidential candidate said in an August 2019 speech at the National Press Club that he wanted to see the end of the Trump presidency "more than anything in the world." Montana is a solid Trump state, voting for the president by 20 points in 2016. In 2018, Jon Tester emphasized his relationship with Trump on the campaign trail, using his first TV ad to highlight "13 bills" he'd worked on that the president had signed. But Bullock does not have a working relationship with the president with which he can appeal to Trump voters.

Beyond guns and Trump, Republicans are eager to dig into Bullock's stances on immigration and the fossil fuel industry, which is a big player in the Montana economy, particularly in the eastern part of the state.

Some Republicans are also angling to attack Bullock over women's issues. An initial statement from the NRSC signaled that they would make Bullock's handling of a top aide who was accused of sexual harassment a campaign issue (Bullock later called his own actions "wrong and naive"). But several other Republican operatives in and around the race demurred about whether that messaging would see any significant play, with one describing it as a "clear second-bucket set of issues" behind the governor's policy stances.

Though Bullock's presidential run was front-page news in Montana, it's not clear the extent to which rank-and-file voters are aware of the various positions the governor took on the trail. In MorningConsult's quarterly gubernatorial poll, conducted over the last three months of 2019 (well after Bullock had faded from the campaign trail), found Bullock's net approval in the state to be +21 points, including +14 among

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independents. Republicans will have to spend significantly to introduce voters to Bullock's more controversial positions.

Bullock will run an "outsider vs. insider" campaign against Daines, aiming to contrast his successes as governor with the continued dysfunction of Washington, DC (Democrats call this strategy "tried-and-true," Republicans call it "cookie cutter"). More broadly, Bullock will be drawing on the reservoir of goodwill he has built up in the state over 12 years of public service, and will aim to recapture some of the magic of his national-trend-defying 2016 victory.

Bullock will make campaign finance reform, which he's backed since his days as attorney general, a central part of his Senate campaign. His website highlights the (ultimately unsuccessful) suit he brought as attorney general to defend Montana's campaign finance law against the *Citizens United* decision, and his announcement video makes further note of the subsequent 2015 campaign finance law he championed, saying that he "banned dark money" in the state and promoted "clean elections."

Bullock will also look to make health care a key point of differentiation in the race. In 2019, Bullock worked with Republicans in the legislature to secure passage of a bill to continue Montana's Medicaid expansion, first enacted in 2016, for another six years. The expansion, which occurred under the auspices of the Affordable Care Act, provides health insurance to an additional 95,000 Montanans and features prominently in the Bullock Senate campaign's early messaging.

Democrats will look to contrast Bullock's record on health care with that of Daines, who they say has failed to take the issue seriously.

Democratic strategists point to Daines' repeated votes to repeal Obamacare over the past three years, including votes for "repeal and replace" and "skinny repeal," and his support for repeal without an immediate replacement. None of those proposals became law, but the votes Republicans took on them in 2017 and 2018 were toxic for many House Members during the midterms, and Democrats hope they exact a similar toll on Daines.

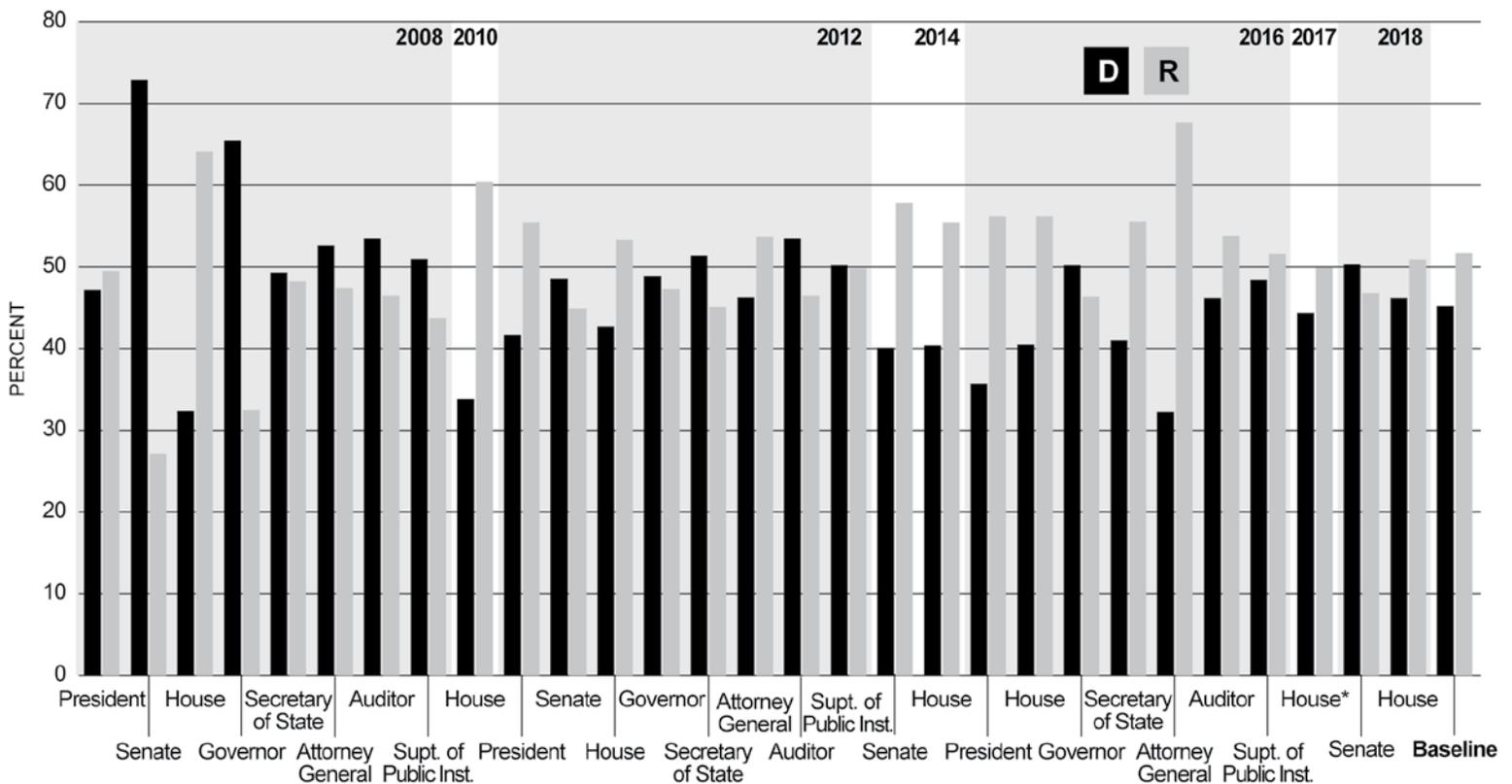
In particular, Democratic strategists think the most salient health care messages will be that by voting to repeal Obamacare, Daines was voting against the Montana Medicaid expansion that covered almost 100,000 Montanans, and removing protections for people with pre-existing conditions. According to the Kaiser Family Foundation, an estimated 24 percent of non-elderly Montanans have pre-existing conditions that would have been non-coverable under pre-ACA practices.

Democrats will also seize on Daines' vote for the 2017 Republican tax cut bill, which they say disproportionately benefited the wealthiest Americans, a group that includes Daines himself. Daines, who worked in business for many years before entering politics, disclosed a net worth of between \$8.9 million and \$32.7 million when he began his Senate campaign in 2014. While Americans in all tax brackets received a cut, the wealthiest slice of Americans saw a greater proportional benefit; the challenge for Democrats will be to convince voters that even though they saw their taxes go down, Daines' motivation was more self-interested as a multimillionaire.

Democrats will also not shy away from going after Daines over his record on public lands. Despite Daines' role in securing permanent

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Statewide Election Results in Montana



* Special Election

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funding for the Land and Water Conservation Fund in 2019, Democrats say he subsequently undermined that progress by only requesting \$600 million for the LWCF, \$300 million short of what the new law authorizes Congress to spend on the fund.

The Path to Victory

If Bullock is going to win, he'll likely need to recreate the path Tester took to victory, and he'll have to do it without having a 4-to-1 financial advantage.

The Democratic vote is concentrated in western Montana, particularly around the state's six major metro areas. Bullock will have to generate large margins out of the Democratic strongholds of Missoula County, Butte and Helena, while holding Daines to a draw in the more moderate Cascade and Yellowstone counties, which encompass Great Falls and Billings, respectively.

He'll also need to overperform in Gallatin County, home to Bozeman and Montana State University. In 2018, Tester improved on Bullock's 2016 margin in Gallatin by more than 4 points, a sign that the county has continued to shift leftward due to an increase in tech jobs and California transplants. For Bullock to offset steep losses in the eastern part of the state, he will have to continue to build on the last two cycles of Democratic performance and top 60 percent of the vote in this county.

Montana's geographic polarization is such that there is a dearth of "swing counties," but look to Lewis and Clark County, home of Missoula, as a benchmark for how the night is going. This is a county that voted for Trump in 2016 by a relatively narrow margin, but was won in 2018 by Kathleen Williams by 9 points while she lost by 4 points statewide, and by Tester by 18 points en route to a 4-point statewide victory. Bullock will need to win this one with a margin in the mid-teens to be competitive statewide.

A wildcard in this race is the effect of the ongoing COVID-19 pandemic that has consumed the public consciousness like few other events. As governor (the only sitting governor running for Senate this cycle), Bullock will be the face of the state's response to the virus. If, like Govs. Andrew Cuomo (N.Y.), Mike DeWine (Ohio), and Larry Hogan (Md.), Bullock acquits himself to a broad, bipartisan swath of voters over the course of the pandemic, he could fold that success into his broader narrative about restoring order to a dysfunctional Washington, parlaying it into crossover appeal. The increased demands of the governor's office could also keep him off the campaign trail, but a strong performance as governor is arguably better for his chances than traditional campaigning.

Likewise, if Republicans in Washington push a stimulus plan that puts money in the pockets of Montana workers, Daines could take credit for that and other successful Trump administration actions, though he will also have to balance campaigning with an increased workload in the capital.

But if the pandemic results in a lasting recession and voters blame the president, it could result in an anti-Trump wave in November, which could drag GOP candidates such as Daines down, to Bullock's advantage.

Early Ads

In what is most certainly not a coincidence, the Daines campaign began airing its first TV ad of the cycle the same week Bullock announced his entry into the race. So far, Daines has placed over \$115,000 on cable and broadcast spots. In the ad, a casually dressed Daines stands in front of a picturesque mountain range and contrasts "Montana

values" with the "socialism" of "Washington liberals," as images of Bernie Sanders, Alexandria Ocasio-Cortez, and Nancy Pelosi flash on the screen. Bullock is not mentioned. Republican strategists say that even if Sanders isn't the nominee, Daines and outside groups will work hard to tie Bullock to left-wing nationally prominent politicians.

The Bullock campaign, still in its infancy, has not yet gone up on air. But the governor is already spending tens of thousands of dollars on digital ads on Facebook highlighting his record as governor, with an emphasis on his expansion of Medicaid and support for public lands. The ad, which doesn't mention Daines, ends with a call to "Make Washington Work Like Montana."

The only Democratic group currently airing TV ads is the pro-ACA group Protect Our Care, a liberal dark money group which placed a \$250,000 buy the week Bullock entered. The Protect Our Care ad attacks Daines' votes on health care, focusing on the attempted repeal of the ACA, coverage for people with preexisting conditions, and the Medicaid expansion — issues on which Democrats say Daines is vulnerable. The ad also mentions the burgeoning coronavirus pandemic, previewing what may become a significant issue in the 2020 elections.

Montana is notoriously difficult to poll well due to its small population and vast geography, and there has been no high quality public polling in the race since Bullock announced his entry. However, public and private polling shows the initial race to be highly competitive; a PPP poll conducted March 12-13 for End Citizens United showed the race tied at 47 percent. Democratic and Republican operatives involved in the race agree that as it stands today, Daines and Bullock are likely in a dead heat.

The Bottom Line

This has potential to become a marquee race. Republicans are eager to plumb Bullock's brief presidential run for signs of hypocrisy and crypto-progressivism, but they also shoulder the burden of bringing that information to Montana voters and convincing them of its relevance. That will take significant resources that could have been spent in other vulnerable seats had Bullock not entered the race, which Democrats and Republicans alike agree is the biggest impact this race has had on 2020 so far.

And there's no guarantee Bullock's flirtation with the Democratic nomination will be as damaging as Republicans hope. The governor has spent the last 12 years of his life in Montana's public eye building up a reputation as a bipartisan problem-solver; will seven months on the presidential trail be his undoing?

It's clear that Daines and outside GOP groups have heavy lifting to do. Bullock had a +21 percent net job approval at the end of 2019, after he ended his run. But the state has seen practically no paid advertising yet, though that's going to change quickly as outside groups get involved.

This is a Trump state in a presidential election year with Trump on the ballot, and Bullock will have to outrun the president by double digits. And unlike 2016, when he did just that, he's not an incumbent. And now he's running in the hyperpartisan world of the Senate, where voters are less likely to split tickets and issues of Senate control and lifetime judicial appointments are on the line.

Bullock's entry into the race was a legitimate game-changer. It took an otherwise solid seat and made it competitive. But until voters begin to really tune in — and given the ongoing pandemic, that could be a while — and some high-quality polling is released, it's not clear whether this ends up being a toss-up race.

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