

THE BROOKINGS INSTITUTION

FALK AUDITORIUM

WHAT TO EXPECT FROM THE 2020 STATE OF THE UNION

Washington, D.C.

Tuesday, February 4, 2020

PARTICIPANTS:

ELAINE KAMARCK, Moderator
Senior Fellow and Founding Director, Center for Effective Public Management
The Brookings Institution

SCOTT R. ANDERSON
David M. Rubenstein Fellow, Governance Studies
Senior Editor, Lawfare
The Brookings Institution

RASHAWN RAY
David M. Rubenstein Fellow, Governance Studies
The Brookings Institution

NICOL TURNER LEE
Fellow, Governance Studies
The Brookings Institution

JON VALANT
Fellow, Governance Studies
The Brookings Institution

* * * * *

P R O C E E D I N G S

MS. KAMARCK: Good morning, everyone. Welcome to Brookings. And to our online audience, welcome to Brookings and to our panel on "What to Expect From the 2020 State of the Union". This was always going to be a big news day because the Iowa caucuses were last night. I hope many of you gave up and went to bed (laughter) because there was just no point in staying up. The Iowa caucuses are probably going to be the most accurate results ever, but that's because they're going to have to take a long time to actually count them. And it's quite an amazing thing to happen when they couldn't have a count, but frankly I think they made the right call. They decided in favor of accuracy instead of quickly feeding the beast.

For those of you not familiar with the long history of the Iowa caucuses, there have been years, 2012 for instance, on the Republican side, when the winner the night of the caucuses was two weeks later declared not the winner. That was Romney and Santorum. So this happened. It's very frustrating. It was obviously frustrating for the campaigns and everybody watching television to try to get a preview of 2020, but in the end I think they've probably done the right thing, as frustrating as it is. And I'm glad people gave up and went to bed. So did I.

This morning we want to focus on the State of the Union, which is tonight. And it will be - - my prediction is -- watched by very many people for, among other things, how President Trump reacts to the impeachment trial that he's going through, whether or not he stays on teleprompter. I'm sure his speechwriters will write a presidential and gracious speech and, of course, the question is will he go off the teleprompter and do some vintage Trump rally rhetoric. And so we'll see that tonight. We will see it probably against the backdrop of the Iowa Caucus winners being announced. My guess is it will come later this afternoon. So it's going to be a very fraught day and evening.

And here to help us think through the implications of all of these things, we have four scholars from Governance Studies. To my immediate left is Scott Anderson, a Rubenstein fellow with us at Governance Studies. He's also a Senior Editor at Lawfare and a former diplomat and lawyer.

To his left is Rashawn Ray. He too is a Rubenstein fellow with us at Governance Studies. He is the executive director for Applied Social Sciences at the University of Maryland Laboratory for Applied Social Sciences. His work is on race and social inequality.

To his left is Nicol Turner Lee. She is also a fellow with us here at Governance Studies in the Center for Technology Innovation. She works on broadband and internet governance issues. She came to us from the Multicultural Media, Telecom and Internet Council.

And last, but not least, is Jon Valant. He is a fellow at the Brown Center for Education Policy. He works on urban school choice issues, especially issues in New Orleans, where he is from and goes back to frequently. And he is here to talk to us about what might be happening in the field of education.

So I think we're going to start with Scott, and I want to start with foreign relations. As you know, that a lot of the news Trump has made in the last six months has been in the area of foreign relations, most recent being the killing of Soleimani and Baghdadi as major successes, trumpeted as major successes in the U.S. war on terrorism. What do you expect to hear from him tonight, and how will he position his leadership in international affairs?

MR. ANDERSON: Yeah, absolutely

You know, foreign relations is always a tricky thing for the State of the Union in my experience as an observer of these for a long time. You have to talk about it. You can't avoid talking about it because you're the president of the United States, national security is a big part of your job. But rarely the thing you want to spend a lot of time talking about because not the thing that mobilizes voters, it's not the thing that you necessarily want to focus in on your major triumph, which tends to be things that are more domestic policy oriented, economic policy oriented. So you tend to locate it about halfway or two-thirds of the way through your speech and spend a concentrated block on foreign relations, national security. Sometimes there's a little hint at it earlier.

I think the few things we're going to see them really focus on are this -- we've seen previews of two of them at least already. The first one actually is probably not even the Soleimani strike and the Baghdadi strike, although as I'll get into that as second one, the first one is going to be trade deals, right. We saw the signing of the USMCA last week. That's now a done deal. Prior to that we've seen the China deal, as the White House has described it, although it's less of a deal and more of kind of an informal understanding about the next steps to be taken, but nonetheless some signs of progress on those talks.

I think that's going to be one of the major focuses because it plays into the domestic concerns and these economic issues that tend to be the real thing they want to emphasize, particularly in this State of the Union, which is before the 2020 elections.

The next one will be the Soleimani and Baghdadi strikes. And I suspect that they're going to try and tie these into a broader narrative about being tough on terrorism and tough on threats against the United States. Now, Soleimani is not your father's terrorism threat, right. Soleimani was an Iranian government official involved in terrorism-like activities, but very different from the al-Qaida associated groups that we've seen the Obama administration and the Bush administration before it focus on. But I suspect the Trump administration is going to try to blend them together, pull them in and say, look, this is -- both killings of Baghdadi, who is the head of ISIS was killed earlier this year, and Soleimani were major strikes against threats against the United States, particularly of a terrorism sort of nature, and play them up in the same way that the Obama administration emphasized the killing of Osama bin Laden as a major victory. They see that as a model they could emulate.

I think they're going to tie it into a little bit of a broader narrative on defense, which is that we've seen a comeback in defense spending and we've seen a focus on addressing national security threats, strengthen the United States' national security position, even as we've seen drawdowns in ships and posture in Syria, potentially in Iraq, potentially in Afghanistan, which are some of the campaign promises we think they're going to come back to.

Two other short things I'll mention that I think we'll see -- and I'm happy to elaborate a little bit further -- that are a little less expected, but I think they're hard to avoid because of recent events. One is the Israeli-Palestinian peace deal we saw the administration roll out last week. Don't expect to get a lot of shrift or substantive dealing. It's just not something we know what the outcome is going to be enough for them to put a lot of emphasis. But the president is going to emphasize this was a historic step by his administration putting this plan out there. He is going to portray it as having a real path to the two-state solution that's been lacking for a long time. And I suspect you're going to see a line or two on it, on that effect, just because it's in the news, you can't avoid talking about it because it's so close to the State of the Union.

The last thing is going to be Ukraine assistance. We've seen the administration come out

and say we want to keep Ukraine assistance static. And that's of course been a major point of criticism in light of the impeachment proceedings, which are still ongoing and won't wind up most likely until the day after the State of the Union tomorrow. So I think you're going to see him come out and confirm, which we've seen administration officials already say, which is that we are going to toe the line, stay on track with Ukraine assistance, keep current levels for at least another year to counter back assertions that somehow this administration has been hostile to Ukraine or compromising national security interests there.

MS. KAMARCK: Great. Thank you. I was hoping you would talk about the Middle East peace process. It looked to a lot of people like it was a thrown together package to distract from impeachment.

MR. ANDERSON: I don't know if that's quite true. You know, it really -- the timing I think is probably best explained by Israeli elections. We've seen this administration take a major action in regards to Israeli-Palestinian relations before every major Israeli election recently. In this case, while they did invite Benny Gantz, who is kind of the opposition leader who is running against Benjamin Netanyahu in the Israeli elections, to the White House as part of this roll out for this plan, we still saw President Trump walk out on stage with Benjamin Netanyahu, unveiled this plan that Netanyahu hailed as historical. So clearly there was an effort to play up their relationship, which is something which is very popular and which is something that Netanyahu really emphasizes domestically.

So I don't think it's too much to distract from impeachment, at least in part also because it didn't really get the domestic roll out that one might have expected. It got a lot of attention for a day or two, but it's not something you see a lot of people coming back to as much in the domestic sphere. International media, you see Jared Kushner and other people really out there pushing it. But I think it has much more of an outward looking intent than an inward looking intent.

MS. KAMARCK: Good. Rashawn, I've been dying to ask you this since Sunday night, so we all saw this Super Bowl ad by Trump where a black woman was thanking the President for helping her get freed. And I want to know, what was that about and what is your reaction to it?

MR. RAY: Yeah, I had a lot of thoughts to the Super Bowl ad that you're talking about the Trump really touted during the Super Bowl. My initial thought was that Super Bowl parties, similar to

weddings and, unfortunately, funerals really show us how segregated our lives are. So what Trump aimed to do with that ad was to really continue to kind of polarize America. So, for me, and potentially more of a racially diverse area where I was for the Super Bowl, or predominantly black area, we were probably having drastically different conversations than some of you might have been having about the ad. And that was purposeful.

So I think really what he was trying to do was he was really trying to signal to African Americans that this is an issue that you're concerned about and it's something that I've actually done something about, and here's an African American woman talking about this. I think deliberately choosing a woman was also something that was strategic because we know that black women relative to black men are more likely to come out. Now, black men are also more likely to come out, but this is what's interesting, and this is I'm pretty sure what Trump knows, when it comes to black men, college-educated black men were more likely to vote for Trump than any other demographic of African Americans. And so the conversation that I was having at the Super Bowl was with a lot of college-educated black men who had a lot of thoughts about Trump. And so what it led to was for the next five-ten and in some cases twenty minutes of the game, it led to a conversation about Trump, which otherwise if he hadn't had that ad would not have happened where I was located at watching the game.

I think the other thing that I think people need to realize is really what Trump is talking about is the First Step Act, which this act really aimed to reintegrate and really reduce recidivism for returning citizens. And part of what that means is to funnel resources for programming, for vocational training, and to also help them be able to restore voting rights. That was a bipartisan effort that, at the end of the day, Trump being a master marketer -- I think people can call him a lot of names, but that is one thing that we really have to be truthful about if we're being objective. What he did at the White House, even bringing in Kim Kardashian, even bringing in some of the colleagues who I worked with, for example, Marcus Bullock with Flickshop, and really saying that we are really trying to do something about this.

The other thing that that led to was a juxtaposition with the Democratic Party. So one of the things that the Democrats have not been able to overcome in this election is the fact that they have taken a hard hit for criminal justice legislation in the '90s. Now, a lot of this actually started in the '80s

under Reagan, but in the '90s was really where it was doubled down -- stop and frisk, the Three Strikes Act. And this is where we really started to see an expansion of racial disparities in policing and in criminal justice.

And so I think part of really what Trump was aiming to do was to allow people to have these segregated conversations. Because that's what was happening. So if you talked about that Super Bowl commercial, if you were watching the Super Bowl, it was probably different from other people's households, wherever they might have been for the party.

And I think the other that is interesting that is a backdrop to this, Darrell Scott, who is of course one of Trump's surrogates and allies, if you look at Cleveland, for example, in Ohio, I mean they've essentially just been going through throwing out envelopes of cash to mostly poor black people. And I think the reason why that's significant is, first, I think it's insulting to think that African Americans will simply get thrown at them and then all of the sudden either they're going to vote for Trump or, potentially more importantly for Trump, not vote. But I think the other thing that that's doing is continuing to draw attention that, hey, I'm in the black community, I'm doing things the Democrats aren't exactly doing.

So I think that that advertisement was something that, if I'm objectively thinking about it from a researcher and putting my policy lens on, was extremely crafty and creative, the timing of it, knowing that people were going to be having these particular conversations. But I really think what people should focus on is the First Step Act. And part of the limitation of the First Step Act is that the vocational training and then linking that vocational training to jobs is something that is limited in the Act. So the point is to reduce recidivism so that people don't return to prison. Part of that is not only about the vocational training, which does show that recidivism is significantly reduced, but it's also about linking people who were formerly incarcerated and returning citizens to jobs and employers to who are interested in helping them to restart their lives.

MS. KAMARCK: Great. Thank you. Say a little bit on black unemployment -- don't you think that that will be a focus of his speech tonight?

MR. RAY: I definitely think so. I mean, you know, similar to what he said in 2016 when he said what do you have to lose. I think now what he's going to say is look what happened, right, you bet on me or you didn't bet on me, but still I significantly reduced unemployment for African Americans,

and as well as Latinos and poor people. But there are a few caveats that are extremely important there. The first thing is that how we think about how the employment rate is actually calculated. We know that the unemployment rate is calculated based on people who are actively seeking a job. So in a lot of low-income communities and a lot of African American communities, predominantly Latino communities, a lot of people have simply opted out of the labor market, and a lot of these individuals are men. So when we think about traditional jobs for men versus women, when we think about kind of clerical work versus say construction and manufacturing work, those jobs that we primarily have viewed as being reserved -- whether or not that should be the case or not -- but primarily where men have desired jobs, simply aren't there in these communities. So I think that's the first thing, that's part of the reason for the dip.

The second thing we have to look at is the quality of jobs. And of course some of our colleagues here at Brookings have done amazing work around looking at the quality of these jobs. And when you look at the quality of these jobs, people are working two and three jobs without healthcare and still cannot put food on the table. So when we talk about jobs, it's not simply that the unemployment rate is low, what I challenge you to do is to look at the quality of those jobs because if those jobs don't allow people to actually be able to put food on the table, keep lights on, provide healthcare for their children, then not only are they going to be working multiple jobs, but some of these individuals who we were just talking about as it relates to returning citizens, might find alternative ways to try to put food on the table.

So the unemployment rate is something that Trump will definitely hold up, but as most people in this room know, the unemployment rate isn't simply because of what Trump has done in the past few years. A lot of that was work that Obama did when he was actively trying to make sure that we didn't enter into another Great Depression, and instead some of the policies that were put in place under the Obama Administration have carried over.

Now, of course, Trump is going to take full credit for it, but I fully expect for him to talk about unemployment a lot tonight.

MS. KAMARCK: Nicol, it seems to me that in every State of the Union we have heard him talk about infrastructure. In fact, not just Trump, Obama. It seems that everybody talks about infrastructure in the State of the Union and we don't ever see it.

What's going on here? And what will happen tonight.

MS. LEE: Thank you, Elaine, for that. Now, Elaine, you know I can't go after Rashawn and not say something about my Super Bowl party, because I wasn't paying attention to that. (Laughter) I've just got to be real clear about that. While he was actually dissecting the Trump commercial, I turned my head and I was waiting for Kansas City to come back with the third quarter and win. Honestly.

You know, I have to, before I go into infrastructure, talk about the issue in terms of the state of black America and how this President has really found these entryways to have these wins. And I think along the lines of what he's actually going to talk about tonight in terms of his goal to strengthen the efficacy of blue collar workers, to promote families and households, has nothing to do with African Americans whatsoever. It has to do with this general premise of having I think this utopian society where people are doing better from where they were. But as we all know, a lot of his election was based on the fear of folks that voted for him. It was the fear that people had under Obama in terms of African Americans, that fear of loss. We're seeing the same thing translated and he's playing off of those messages of fear to let people think that they're doing better.

Let me go back to real quickly on the black -- my colleague has spoken so well about the First Step Act and he's actually laid the ground work for black unemployment, if you don't mind. But let's talk about what this President has done in the midst of actually saying that he's reduced black unemployment. He's pulled the social safety nets that Obama put in place to actually lay the foundation for economic viability. What we've actually seen in the last couple of years has been a reduction in tack on food stamps and any other social safety nets that actually help people when they're in between jobs, on the cusp of having jobs. Under his new proposal that came out just a couple of months ago, 8,000 people will be taken from the rolls, there will be tighter worker restrictions in terms of requalification. We're essentially going to see about a reduction in about \$100 worth of benefits, and for a family that is working class and disproportionately minority, that's not good.

We've seen him attack worker protections, because people of color tend to be last hired, first fired. The lack of worker protections is actually going to place extra burden in maintaining, I think, the stability among African American families when it comes to low unemployment.

And I want to echo what Rashawn said, when we look at black unemployment within the community, it may look well, but compared to whites it does not really fair that well.

I think the other thing that we actually are seeing in this administration to sort of dismantle that is also the lack of enforcement of anti discrimination laws. Just recently HUD passed a caveat making it harder for people to sue when there are civil rights violations. All of these matter in terms of the economic sustainability of communities, particularly communities of color. And let me not go down the pathway for Latinos in terms of what he's doing in terms of immigration affronts. All of that matters in terms of stability and the efficacy of families.

So when I think about what he's going to talk about tonight, just like that Super Bowl wasn't talking to me, his State of the Union is not going to be talking to me. I'm not going to turn my head because it's really important as a policy maker to see everything that he's saying, but at the same token I think we need to go in there -- really what he's telling tonight is I'm innocent and if you believe the hype, keep following me because I'm going to make your life better, but it's not going to be directed to those of us that sit and feel that daily we're being attacked or our rights are being taken away.

That's what we're going to hear tonight, it's this plea in this campaign to prove innocence in light, I think, of all this egregious action sort of dismantle American democracy and the American household.

On infrastructure, it's the same thing. Now, a few years ago, Elaine, I'll just tell you this, when I sit around my broadband friends, we used to play not the drinking game, because I don't drink, the cranberry juice game. Every time you said broadband or internet we took a drink. (Laughter) We did really well last year because he actually said it a couple of times. I'm not sure what he's going to do this year with the infrastructure bill. What started out as \$2 trillion, focus on America's crumbling infrastructure system, the inclusion of broadband as one of those areas because rural voters do not have access to high speed broadband, has become a debacle. Just the other day the Democrats put out a \$760 million proposal to actually bring back life to this conversation around infrastructure. I think because Democrats actually put it out that we probably won't hear anything about infrastructure tonight (laughing), just because he won't do it based on the polarization. But if we do, I'll be happy because we know we actually have to do something.

What's interesting about the conversation on infrastructure, particularly in broadband, we're seeing Federal agencies take action. Just a couple of days ago the FCC put out a rural digital

opportunity fund that's actually going to put more money into investments, into rural connectivity, while at the same time reducing duplication of subsidies. So I would think there it might be interesting.

I think we also might hear on the technology side, just on the infrastructure side, sort of related, is his attention to AI. When I think about -- and here when I think about what he's actually going to talk about in those spaces, is how we're doing a better job beating China. And so, you know, I'm the scholar that kind of keeps it real up here. I don't think we're really going to see this like grandiose, you know, unpacking of how the U.S. has really tried to become a force of nature and beat the 5G race and beat the AI race and ensure we have the infrastructure needed for new jobs in industry. I think we're going to see a lot of peddling around that we need to do this stuff in order to be globally efficient and to have a marker that says we're doing it.

I mean the White House and the Federal agencies -- no offense to them, they're doing a fantastic job in these limited circumstances of putting out principles and plans and 5G models and what we need to look at in terms of 21 century infrastructure. The extent to which that will show up in the SOTU tonight, I don't know.

MS. KAMARCK: Okay.

MS. LEE: Primarily because it's not become an issue, a political issue, right at this moment. And the extent to which it's not a political issue as we know, make sure it's not necessarily prominent in those talking points, because I think right now what he's appealing to is look at me, I'm Sandra Dee and what I've done, as opposed to look at what I've done in terms of my campaign promises that I actually sold the ballot on.

MS. KAMARCK: It's interesting that you bring up rural broadband, because one of the issues last night in Iowa was that in many rural counties they didn't have the broadband capacity to download the app that would allow them to send in the results.

MS. LEE: That's right.

MS. KAMARCK: So, you know, we saw it in reality last night.

MS. LEE: And I mean, if I can say on that, I mean that is a big issue in America right now. It's a bipartisan issue that's actually happening. We're seeing Congress respond to this. A lot of Republicans and Democrats are realizing the lack of access to broadband ensures that most of their

constituents will stay in an analog existence, which will place them behind any type of modernization of new systems. Even when it comes to the future re-skilling and the future of work, there will be communities that will be left behind.

Iowa was a great example. I tried to stay up and then when I woke up to all that news, you know, it clearly should be in the center of any political issue that's part of this upcoming election. It's a complicated issue to solve, but the question is it has to be bipartisan. And the extent to which we'll actually see the State of the Union, this conversation about a bipartisan approach to infrastructure and broadband will be really curious to me given that, as Rashawn has mentioned, and Scott, everything has been so polarized during this election period.

MS. KAMARCK: Jon, that's a great segue, talking about broadband and the importance of broadband to education. Do you think the President will talk about education tonight? Do you think he will make the case for more privatization? And what do you think his overall effect has been in reality on public education? And what do you think he'll say about that?

MR. VALANT: Sure. Thank you. Thanks for the question.

So it's been a sort of strange few years for us in education. When you think back to the very early days of the Trump Presidency you might remember the confirmation hearing for Betsy DeVos. There was something about teachers needing guns and bears roaming around, and lots of sort of strange things. And that is not common. We typically don't have figures sitting in the U.S. Department of Education who are that well-known publicly. And there was apolitical poll that came out in the very early days of the Trump presidency and DeVos was the most unpopular cabinet secretary at the time. And she's sort of been in the news. She's been showing up in Democratic fundraising efforts. And we're not used to that, right. So education is not primarily a fundamental role, it really falls to states and localities to handle education issues.

And so there was a lot of concern early on about where exactly Betsy DeVos and Donald Trump were going to take public education in the United States, and a lot of that for good reason. Betsy DeVos is not at her core a public schools person. She has almost no background in public schools, she comes out of advocacy groups for private schools. And there was a lot of curiosity about where is this going to take us and a lot of concern.

And what has happened over the last few years is from very early on they had some big ambitious policy priorities that really didn't go anywhere. And the biggest most notable one was this sort of big -- it's called a tax credit scholarship program. It is more or less a private school voucher program. And what they ran into is a conflict within the Republican Party when it comes to education priorities, which is on one hand they have some priorities. The Republicans in Congress have some things that they like. They like the idea of school choice and that families get to go and choose the schools they want, even if those schools are private schools. On the other hand, they don't like the idea that the Federal Government is going to have a big role in education. They like deferring to states and localities. And really it was that other hand that won out. So the sort of attempts to really remake public education from here in Washington didn't really go anywhere.

And so what we've seen as far as their actual impact so far in the last couple of years has been important, but it's more of the type that's sort of a short-term effect that I think will be undone in the long-term. So they have been doing a lot of deregulation, they've undone some guidance that the Obama administration had issued, so on important issues like student discipline and preventing discrimination in how kids of different backgrounds are punished, protections for transgender students. They rolled back some protections there.

But those are the types of things that a Democratic successor could undo with the stroke of a pen. And so my view of the impact here from D.C. of the Trump-DeVos administration is the actual policy impact, the long-term policy impact is going to be pretty modest directly. Where I think they will have real impact is they have become such divisive figures and have sort of drawn education to the center of so many of these conversations, that they are polarizing the politics of education in ways that we haven't seen before. And I think it's come out most clearly in attitudes toward charter schools, which look really different now from how they did a couple of years ago. For a long time there's been kind of bipartisan support for charter schools, which are public schools that are sort of privately run, and that is changing and we're seeing now a lot more Democratic opposition. And it's come in part in response to seeing Betsy DeVos and Donald Trump embrace those kinds of ideas.

So I think there will be big long-term effects from this administration. Sort of ironically it's going to go in the exact opposition direction that they pushed in, and it's coming from the politics not the

policy.

What I think we're going to see tonight, I think they still have this sort of hope for a tax credit scholarship program. We may see a line or two on that. I think we'll see some sort of credit taking for a couple of things that have happened in the past few years, but education has not featured prominently in past State of Union addresses and I don't think it will tonight.

MS. KAMARCK: Go for a minute a little bit deeper on this question of the split within the Republican Party on education. Is this a split driven primarily by attitudes towards Federal control?

MR. VALANT: So it's not even so much a split in that different parts of the Republican Party have different ideas. They have two ideas that sort of fundamentally conflict. One is believing that the Federal Government ought not do much when it comes to education policy, and the other is having things that they want to see done. And so typically the way it plays out is those efforts get funneled down to state and local levels. And we have seen more of that. We've seen sort of some states following the lead of what it is that the Trump administration is sort of calling out as priorities, but when it comes to actual legislation from here in Washington, they tend to struggle when it comes to getting big priorities through. And even in the early days, there was talk of sort of severely reshaping the Department of Education. That went nowhere with congressional Republicans, let alone with congressional Democrats. The private school tax credit stuff, that also went nowhere with congressional Republicans. They just are not set up to do a lot from the Federal level.

MS. KAMARCK: Okay, good.

Okay, I want to go to the panel one more time before we come to the audience and ask a broader question, which is what elements of the president's speech tonight do you think will signal his 2020 campaign? Key elements of his campaign?

Why don't we go Rashawn and Jon and I'll do -- I'll mix it up a little bit. Rashawn, why don't you start?

MR. RAY: What do I think he's going to say that's going to signal his campaign? I mean I think he's going to continue to double down on what he's been saying as it relates to most of America is better because I'm here. And the issues that you've had -- so I say all this to say I think he's going to take a very broad view and I think what he's going to say is you have two choices, you have me or you have

the Democratic Party. They can't even figure out Iowa. (Laughter) I mean, you know, they can't even figure out Iowa. So, yeah, like I remember last night at like 1:00 o'clock I'm trying to wait so I can see what's going to happen because I'm thinking that's going to inform -- because, you know, Trump always attacks people. So I was like he's going to attack whoever he thinks is his biggest competition. Right now we don't exactly know. I mean, of course, it might come in later today, but I think he's going to frame the entire Democratic Party, so that signaling that he was giving to black voters in the previous election, which is what do you have to lose, I think he's going to say that to America, what do you have to lose and, in fact, what do you have to gain with me being here.

Now, I think we can poke holes in that from a policy standpoint and even from the fact of people's everyday lives, but I think that's one of the things that he's going to really, really talk about.

And to Nicol's point, I think this is important because what Trump says at the State of the Union tonight, or even putting together a Super Bowl ad or the other ads we've seen, that doesn't diminish people's everyday experiences that are drastically different from some of the things we hear coming out of the White House.

So there's one big stat from the 2016 election that I think has carried over over the past 4 years, which is in places where Trump campaigned in 2016 hate crimes increased over 200 percent. Now, this is something that he won't necessarily bring up in this way, and if he does bring up domestic terrorism it won't be in a way that's really impacting a large number of people in the United States, whether that be people who are Jewish, whether that be people who are black, immigrant, Latino, et cetera. And so those are things he won't necessarily bring up in that way, but that's something that I really want people to pay attention to because even in this area, for example, so one new group that's really popped up is called The Base, which was attempting to have some big event in Prince Georges County and then the other place where -- of course they were going to Virginia -- but the other big place was in Georgia. It's not an accident that these are the two most affluent African American areas in the United States, it's not on accident. But what Trump has done from a policy standpoint is actually removed a lot of white nationalist organizations from the hate group registry. So he's been allowing this to proliferate.

But, yeah, I think he's going to say look, unemployment is down, I caught this person in

Iran, you know, I did all of these things and the world is better because of me and, more importantly, the United States is better because of me. And I think what's key, and this is I think the group he's really talking to, we have to remember that if we go from 2012 to 2016 there were about 11 percent of whites who voted for Obama in 2012 that then voted for Trump in 2016. And I think if Bernie Sanders had of been the candidate, many of them probably would have voted for him, but they became so dismayed with the Democratic Party that they switched to Trump because they wanted something different. And that group -- the same way he was signaling with that Super Bowl commercial to African Americans, he was also signaling to that group. It's not just simply that these individuals are Independents, some of these individuals are new voters, some of these who are people who have sat out. And so that 11 percent is really who he's talking about, because if he gets that 11 percent he's going to probably win again.

MS. KAMARCK: Good. Hey, Jon, what are your thoughts? What are your thoughts on this?

MR. VALANT: So I mean this is an election year State of the Union Address, so I think he's going to look back at least as much as he looks forward. And I'm sure he's being advised now to talk about some of the more unifying things that he can come up with. So I think we'll hear a lot about the economy and how the economy is doing well for everyone. And I think there is going to be sort of a lot claims of progress that are attributable directly to him.

I would imagine in his head is a desire to stick some figures in eyes when it comes to Iowa, when it comes to impeachment, and to lots of other things. So I will be curious to see if any of that actually comes through. But I think we will see him at his sort of most willing to claim credit for all kinds of things and most people who are watching will either sort of be on his side already and be inclined to buy that or to see through that and not buy it at all.

I'm not expecting sort of major 2020 initiatives coming, at least on the education side. I think he will talk about paid family leave and maybe he might mention career and technical education, some things that were sort of popular with Democrats and Republicans that have happened over the past couple of years, but I'm not expecting to hear of many big priorities going forward.

MS. KAMARCK: Nicol?

MS. LEE: It's hard. So what do I expect to hear? So I expect to hear, again going back

to what I said earlier, this theme of fear, I expect to hear him frame something around feeding off of America's fear of loss of national security, of healthcare, of jobs, of sense of self, right. And I think what is actually interesting about the placement of the State of Union is, you know, just last week we shut down six countries of immigrating legally to the United States. We have the Coronavirus that has now, you know, sort of justified the locking down of the Chinese border. And I think he's going to play off of that in this theme of look what I've done because of X, right, and sort of drive into all of these factors -- what we've done with the Iranian war -- all of that leads to what I promised you four years ago, which is to regain the sense of pride in "America first", as Rashawn said, but to allow his -- speak to his voters to say look what I've done to give you back a sense of community and a sense of self.

And I think as it's been previous -- it's a very dangerous pathway to go because as many of my colleagues have said and we've written about, it's polarizing for one, and it doesn't lead this pathway towards some kind of success in our democracy. So a lot of what we saw in Iowa, for example, yesterday was not about the party, it was about the people. And so we're back to this conversation of who do we beat Trump with versus what are the values and principles of America that we need to adhere to, what are the programs and policies that work.

You know, I think going forward we're going to leave the State of the Union the very way we watch it. For those of us that are supportive of the agenda of this administration, we're going to feel good that, you know, not too many more foreigners are coming into this country and more jobs are staying in America and the private sector has been locked down to be "America first" and my job is going to come back in the next 10 years because he said so. But those of us on the other side and those of us who may be independent and those of who just may be really confused because it's been a mess, we're going to leave there and say yeah, and then we're going to look at the Democratic Party and say yeah, and not know what to do next, right? (laughter) It's kind of how I left yesterday. Like I went to bed at one o'clock a little nervous, like oh lord. (Laughter) What happens after this, right?

And so, you know, I think that's going to be wrapped up in -- and I think, Elaine, you sort of hit it on the nose, the extent to which he stays on talking points versus the extent to which he sees this as a campaign podium to basically suggest look what I've done, my voter. It's going to be interesting. So I think anybody who's watching it tonight, you need to watch it to see what the policies are. And, again, I

want to go back and say even though he is the president, there are federal agencies that are working, you know, well aligned with some really good policy agendas, but I don't think that's what we're going to hear tonight. I think we're just going to hear this call for this preservation of the type of hysteria that was sort of fueled by him in this election.

And I want to -- if you don't mind -- go back to, this is what we're seeing with Bernie is very similar. I said to people a few years ago, I'm a sociologist, I said, you know, in 2016 the Bernie Sanders people were the children of upper middle class kids sitting at the dining room table trying to figure out how to break through, you know, what has created high student debt, making them stay home with their parents, just general dissatisfaction with the economy. The Trump people were the people who were sitting at the table saying, you know, we've been left behind, we've had this president that hasn't cared about us and, you know, they're having similar types of conversations but at different dinner tables. I'm looking at Darrell -- his book about the polarized America speaks a lot to that tribalism, right, that's happened.

In 2012 with Obama it was people having conversations around, you know, this ideal of being like, you know, African American voters, women voters, millennium voters, being stuck. And so again, I think what we saw yesterday, to which he's going to appeal to tonight, is that stuck voter who wants to be at the dinner table and wants their serving of whatever is available in this democracy. And the degree to which he's able to convince people that he's done that is actually going to be I think a heads up on his campaign.

MS. KAMARCK: You know, it's interesting, nobody yet has mentioned immigration.

MS. LEE: Yeah, I said it.

MS. KAMARCK: And you just alluded to it and I said, oh, that was interesting that it was absent. So one of the things that I'll be looking for is does he dwell on this theme of the other coming to the United States.

MS. LEE: Oh, yeah.

MS. KAMARCK: You know, they did it in 2018. He, against the advice of his advisors who wanted him to talk about the economy, he turned 2018 into an election about immigration and it didn't work so well. So I'm curious to see if immigration becomes a centerpiece tonight as it has been in

so many of his other appearances. Scott?

MR. ANDERSON: Yeah, so, you know, when it comes to foreign relations and national security again, it is a little bit of a different pitch, but we saw President Trump run on a particular vision of that. And that is the "America First" vision in 2016. It was about taking American power, American influence, and using it in a much more targeted way to advance more myopic, if you're critical of it, a more focused, if you're more generous to a view of what American national interests are.

And I think what we're going to see is an effort to take what has happened over the last three years -- not just last year, the last three years -- and put it in that framework and re-describe it, frame it, put it in a narrative, because it's been a little all over the place. I think there's been a lot of people who came in supportive of that vision who are a little dissatisfied with some ways the president is taking it. And he's going to try and both address their concerns and frame what he's done in that light.

In that light you have the trade agreements. That fits reasonably well. He's got two happy stories to talk about there. Soleimani, the Baghdadi killings, as we mentioned already, fit in there a little bit as well. You're going to see probably a little bit of a new focus on this idea of I'm using force, a little more limited fashion. This is where Syria comes into play, where he's going to try and say, you know, we're still fighting the war on ISIS, but we've gotten some troops out of Syria. He may not mention Syria specifically, but I suspect it's going to fit into the broader image of we're reducing our troop commitments.

Not it's a bit of a feint, right. U.S. overall troop commitments to the Middle East is actually still substantial and growing because of new troops that have been placed in regards to Iran and Saudi Arabia, other parts of the region, but actual troop presence in the major theaters of combat has been a little bit on decline and seems to be on the precipice of possible major decline in Afghanistan, possibly Iraq, although a little less voluntarily there, a few other places. So they may fit into that narrative there.

And he's going to really hit that -- again, the military spending point to say we're stronger, we're using our resources. On the kind of -- oh, and I should say another point that I think he's really going to emphasize here on that front is foreign contributions. This is President Trump's pet peeve in foreign relations, is that both in foreign assistance and security assistance, every measure, all these foreign allies are taking advantage of the United States. And I strongly expect him to talk about the fact

that he's gotten NATO contributions up, that they're pushing for new contributions from South Korea, although that causes some problems, so they may not focus on that particular case, they're trying to get more contributions to a variety of foreign assistance programs, and that they've cut assistance in a lot of different areas where they argue are ineffective. Query whether that's true or not. There are a lot of different views, but that's certainly the frame that they're going to adopt and say that we're taking our resources and using them more effectively for the American people.

The flip side of that is he's got to hedge some of the missteps he's made. And I will say, President Trump, I think, in prior States of the Union, prior major addresses, he's actually a pretty disciplined guy when it comes to message on these things. He ad hocs in a lot of other contexts, rarely for these major addresses. So I suspect we're going to see a pretty disciplined framing of these sort of points. He's not going to try and play up any discord with NATO. In fact I suspect you may see a note of appreciation for NATO support on a few different measures. Again, he's going to talk about Ukraine continuity and security assistance as a sign that he's maintaining a line against Russia to reduce concerns that somehow he's giving away the game on Russia. Instead he's saying, nope, I'm supporting Ukraine, that's the front line of the Russia tensions that we have and I'm keeping the ball in play there, I'm keeping the status quo.

I also think you're going to see an effort to address, you know, other more specific issue areas, potentially where there have been some concerns. So you have the INF treaty that he withdrew from regarding nuclear weapons, we have the New Start Treaty that's up for renewal in February 2021. You're going to see some messaging, not necessarily in this address, but I think moving forward at least from this point, trying to say we're maintaining some openness. We want to see restrictions on nuclear weapons. Not committing, playing down some rhetoric we saw earlier criticizing some of these agreements because people get nervous about that sort of disruption.

In other words, I think we know what the foreign relations policy of this administration looks like, the frame. We're going to see a lot less kind of chaos and static, to the extent they can control it, messaging wise and elsewhere leading up to the election and more focus on these sort of "America first" themes.

Again, foreign relations, unpredictable, a lot of it is out of U.S. control, there is going to be

things that happen that may not be able to stay this line, but we're going to see that be the frame that they're going to try to use the State of the Union to launch, particularly as we kind of come back to the end of this impeachment, that's going to be the kick off of the real election season. And I think you're going to really see those themes hit and then built on, which is a continuity with the themes that he ran on in 2016.

MS. KAMARCK: You know, it's interesting the way you talked about that because if he can in fact turn "Make America Great Again" or "America first" into a coherent foreign policy, which so far it's been more of an ad hoc foreign policy, I think that would probably go a long way towards burnishing his credentials as a ruler and as a competent president. That part of what has so upset people about his foreign policy is the fact that he seems to pull it out of a hat --

MR. ANDERSON: Exactly.

MS. KAMARCK: -- every day at his whim, whereas if he uses this State of the Union to sort of craft it into something that looks like he intended to do it all along and made sense.

MR. ANDERSON: Ex post rationalization is the name of the game.

MS. KAMARCK: Ex post -- yeah, might be that. And, of course, I agree, I think he'll probably stick to the script. The question is, what does he do when he gets in bed that night and starts texting? (Laughing)

SPEAKER: Exactly.

MS. LEE: Well, he's going to tell us everything he wanted to say.

SPEAKER: Right.

MS. KAMARCK: He's going to say everything he really wanted to say.

Okay, let's have some questions from the audience. And I think we have people with microphones. Please pass them around. Why don't we start with the gentleman in the back right there? Yes.

SPEAKER: Hi, my name is Justin. I have a question about healthcare. Healthcare was not brought up and the cost of drugs and the importation plan from Canada, the international drug price fixing plan. Do you expect healthcare to play a large role in this speech considering the debacle that it was for the president in his first year, or do you expect him to ignore it or what? Because it is a priority for

the voters.

MS. KAMARCK: Anybody want to take that?

MS. LEE: I mean I think actually healthcare is going to be one of the points that he's actually going to bring up, particularly since he feels that they've not been able to come to any type of bipartisan consensus on this. And I think he is actually going to try to push tonight -- I think in addition to the foreign policy, healthcare is one of the central pillars. I meant to say that in my opening, because in his umbrella, you know, campaign to ensure the promotion of families, healthcare is at the center of that and the rising healthcare costs, in addition to the opioid addiction crisis, et cetera. It's going to mean a lot. I think in many respects it does go back to this "America First" framework in terms of how we even look at prescription drugs, et cetera.

MS. KAMARCK: Okay. Any other comments on healthcare?

Let me just add to that. I would think that as with immigration, which -- that he's going to take some lessons from 2018 and try to not appear as hostile --

SPEAKER: Yeah.

MS. LEE: Right.

MS. KAMARCK: -- to healthcare and the healthcare concerns of Americans. If you remember, in 2018 Nancy Pelosi credited the Democratic takeover of the House to Mr. Healthcare. And so I think at least he's got to try and neutralize that issue. I'm not sure he has -- I'm not as sure as you are, Nicol, that he has a lot of good to say about anything.

MS. LEE: No, no. I think he's just going to use it as a pivot point to sort of recalibrate his message.

MS. KAMARCK: That's right, that's right.

MS. LEE: Because I do think that's going to be a major campaign issue.

MS. KAMARCK: Good. The gentleman over here, and then we'll come to this side.

MR. GOLASH: Hi, my name is Mike Golash.

You didn't address the issue of social inequality and I was wondering whether any of you think that will be a significant point. It's really something that he can't really address very successfully because he's caused more of it, but I think it's something that has to be addressed.

MS. KAMARCK: Yeah, anybody?

MR. RAY: Yeah. I mean I think when it come social inequality I think, again, the way he's going to really try to frame it is about low unemployment, is about the fact that I'm helping people get out of prison.

MS. LEE: Right.

MR. RAY: And part of both of those frames is to frame him as being drastically different from the Democratic Party. So part of what he's trying to do right now, particularly because we don't have a Democratic frontrunner, he's going to try to frame the entire Democratic Party as being opposite and not as good as him on these fronts.

So he's going to play up unemployment, he's going to say that in local communities we actually are seeing people thriving. I can even see him having the woman from the commercial there --

MS. LEE: He will.

MR. RAY: -- from the Super Bowl ad and tell her to stand up in the audience.

MS. LEE: He will. (Laughter)

MR. RAY: And so part of what he's aiming to do --

MS. LEE: The Kardashians will be there too. (Laughter)

MR. RAY: Oh, yeah, I mean Kim might be there as well. Definitely Kanye. But it's one of those things where what he's trying to do there is to not talk about the real issues as it relates to social inequality. Like he's not really going to talk about the fact that when it comes to overt forms of racism, that's increased. He's not going to talk some of the overt forms as we know it as it relates to immigration and xenophobia and the like. And so instead what he's going to try to do is not talk about social inequality, instead he's going to try to talk about how things are getting more equitable for certain groups of people.

And this is what's key, he's signaling to certain groups of people -- as I said before, that 11 percent that switched. When it comes to African Americans, one out of five college educated black men voted for him in 2016. He's trying to increase that number. So we have to be very clear, like he's not signaling to all of us when he says these things. When you look at a lot of college educated African Americans relative to those who aren't, even though of course race mutes a lot of people's ability to be

upwardly mobile, college educated African American's lives are different from people who don't have a college degree and people who are living in poverty. And he's going to try to play that up, he's going to say, look, I can help you with your investments, I can help you with these sort of things.

So I say all of that to say Trump isn't a president who is going to get up and talk social inequality and how he needs to fix that. He's never cared about that. Instead, what he's trying to do is he's trying to take a group and kind of align with him.

MS. LEE: Right. And if I could actually -- I want to sort of take on what Rashawn was talking about to your question. I think he's going to frame social inequality as again this signaling to his voter that he's reduced that in comparison to where we stand globally. And I think what we're missing is a lot of -- I mean the recent -- and I want to go back again because I think we keep missing these policy changes -- the recent immigration bans on, you know, the Eritreans and other countries is really about, you know, sort of cancelling out this competition of American workers with other workers and, again, re-empowering blue collar workers in fields that perceived immigrants have taken. I mean there is no political threat of these folks, there's no, you know, economic threat. I mean they are in low wage jobs.

And so I think he's really going to be looking at how do I talk about reduction of social inequalities from the U.S. compared to other places that we're comparing ourselves against. I think we kind of miss that sometimes when we think about who he's talking to.

When he talks about social inequality he's going to look at that between the farmer and the person that may have worked on the coal mine. You know, reducing what people have perceived as inequalities that exist within the working class and sort of, you know, saying I've taken steps to do X to make sure that you're not left behind.

I think Rashawn is right on; he's never going to get up and say -- I mean in the black unemployment thing, the only way I've heard him talk about it is look, black people, you're doing well, you're working, right. It's because of me that you are -- you got full-time employment. I'm like, yeah, slavery had me full-time employed, but wasn't good. (Laughter) So part of it is he's never going to like admit that he's actually creating these new set of inequalities or perpetuating them.

I mean we haven't had a real solid conversation about the inequalities against transgender communities. I mean all of these slight deviations from what equality means are happening,

but that's not how he's framing it.

SPEAKER: Exactly.

MS. LEE: And if I'm a Trump voter and I'm seeing that globally he's sort of maintaining us a world leader, a global leader, in all of these areas, I'm going to say, yeah, he's reducing my social inequality to actually get the things that I need as a farmer -- you know what I mean -- versus social equality sociologists, which is alleviating, you know, the egregious actions of discrimination and unlawfulness and, you know, profiling. That's happening, you know, from a bigger broad stance. And so I think you're completely right, that's not who he's signaling a social equality message towards.

MS. KAMARCK: But let me drill down once more on this point and then we will come to this side of the room, because, Rashawn, I'm fascinated by the college educated black men who are Trump voters. How much --

MS. LEE: I'm fascinated by that too. Who are they?

MR. RAY: I'm fascinated by them too. (Laughter)

MS. LEE: I'd like to know who you're talking about.

MR. RAY: I've talked to them and I'm still perplexed by it to tell you the truth.

MS. LEE: Because I'm (inaudible) are you talking about. (Laughing)

MR. RAY: One out of five. They come to my house and I do the analysis.

MS. LEE: Oh, lord, I've got to make sure I pick my friends carefully. (Laughter)

MS. KAMARCK: So my question is Trump's signaling, how much is he actually signaling not to black voters, but to suburban white voters --

MS. LEE: That's the key.

MS. KAMARCK: -- who are much more numerous and who are made uncomfortable by the tendency of this president to say racist things and to take racist actions? How much is it an effort to hold some of those suburbs with him as opposed to voting Democratic, which they did in 2018?

MR. RAY: Without a doubt. I mean I think the stat is like 56 percent of white women voted for Trump. And so this was -- you know considering in 2016 when a white woman was running for president, a person who has been heralded in Hillary Clinton as being about women empowerment. And so, yes, I think the messaging can be similar to both of those groups because part of what Trump really

understands -- and this is what he understood about the Electoral College in 2016 -- he didn't care about the popular vote, that doesn't win. Like who cares about that? That's not how you win the presidency. And even he said, he was like if we were talking about the popular vote, if that won I would have campaigned in California like crazy. He was like there was no point in me going over there.

And so what he is playing to, to your point, are suburban white families who, to be honest with you, based on their racial attitudes, don't want to see the racial demographics of their neighborhoods change. They're okay with the one or two black or Latino families. And then that becomes the one black family that's the one out of five educated black men who they're having conversations about, making it seem like Trump is doing a whole lot better for them than he actually is.

And so I think that signaling becomes extremely, extremely key and that's what Trump fully understands when he's doing the messaging.

For a lot of people who have been die hard Democrats, die hard liberals and progressives, they're never going to vote to them. He's not talking to that group.

MS. LEE: No.

MR. RAY: He's talking to the group of people who are worried when they see the racial demographics of their mall change, that when they're worried when they see someone who is a racial minority move in their neighborhood and they're wondering whether or not they're legal or not, even though they've probably been here for 20 years and they are. And we have to be realistic. And this gets back to Nicol's fear. Trump can make certain statements that are -- I mean I really think he's loudly barking in a lot of ways, not necessarily dog whistles -- but when he does that, he's signaling to people that I can help you maintain the life you want to live. And I think that's what people have to understand, that social inequality question.

MS. LEE: Right.

MR. RAY: He's not concerned about their group, he's concerned about the group of people who think their lives are okay. And if more immigrants come in -- if the racial demographics change, if the jobs change, that that's going to impact my life, instead of everyone realizing that when you raise the bottom, the upper part is raised too. People don't think like that.

MS. LEE: And, Elaine, if I can -- a couple of years ago I was in Cambridge, Maryland

watching TV and a Trump commercial came on, and to Rashawn's point, it was a woman who was in her yoga pants, a white woman in her yoga pants, who was in this commercial putting her baby in her car seat, strapping her baby up, and her message was thank you, Mr. Trump, because (laughing) -- and I -- somebody said well, what did you take from that commercial. I said that her husband works and that she's able to stay home and take yoga classes.

MS. KAMARCK: Right.

MS. LEE: And so as a result she's attributed his election -- this was two years ago -- to the fact that there is some economic sensibility for her family based on what he did.

I think the appeal -- and this is where I think the Democrats are sort of missing this -- the appeal to voters and what Iowa showed us yesterday, there are two bodies of people that are going to be important in this upcoming election, millennials and white women. And a lot of that is going to be framed, I think, around this economic narrative that gets told, the national security, that narrative that gets told, and the ability of millennials to sort of break out of the status quo and have a lot more leeway against I think some of the rigid structures that have come into place (inaudible).

MS. KAMARCK: Good. Okay, let's move over here. Right here up front and then we'll come back to you. Right here. Anybody else got some -- okay, all right, so we'll go here and there. Okay, yes.

MR. CHECCO: Thank you. Larry Checco.

I think this is a segue question, but can we take bets on how many times we may hear the word socialist or socialism in tonight's speech?

MS. LEE: Oh, yeah. Oh, yeah.

MR. CHECCO: And especially if Bernie and Warren come out pretty high in these caucuses?

MS. LEE: Yeah. Oh, we're going to hear it.

MS. KAMARCK: Yeah, who wants to take that one on?

MS. LEE: Should we tweet you every time we hear it? (Laughter)

MR. RAY: You can play your cranberry juice game.

MS. LEE: Our cranberry juice game, because I'm not going to be drunk. I have to come

to work tomorrow. I think we're going to hear it and I think Elaine hit it right on the nose. If we see Warren and Sanders and Buttigieg actually hit the top, it is going to be a claim toward socialism and socialist policies.

MR. CHECCO: And that scares people.

MS. LEE: Yes. And it is and it's going to again bring more fear that society is going to change and lean much further to the left than we actually thought before.

MS. KAMARCK: Interestingly enough, it scares older people a lot more than it scares younger people.

MR. RAY: Yeah.

MS. LEE: Yes, yes.

MS. KAMARCK: Younger people don't have the same set of associations, historical memories, with the Gulag and with the authoritarianism that was so often attached to socialism. It's just not there.

MR. CHECCO: Right, it's the older people.

MS. LEE: Yeah.

MS. KAMARCK: It's the older people and the older -- and the polling shows this, the dramatic differences between the old and the young when it come to socialism. So that is a big generational difference. We are seeing generational differences. We saw there were some exit polls last night showing big generational differences between Biden and Bernie Sanders.

So I think we're going to continue to see these right through the election.

MR. ANDERSON: Yeah, and I --

MR. RAY: Sorry, Scott, go ahead.

MS. KAMARCK: Yeah, Scott.

MR. ANDERSON: I think one thing though we should bear in mind here is the State of the Union isn't a stump speech, right?

SPEAKER: Is not?

MR. ANDERSON: Is not. The State of the Union tends to be a little bit of a different audience and is constructed and approached in a little bit different way, particularly in the lead-up to an

election year. And we've heard this from every Trump -- to prep for this I listened to every Trump surrogate I could find, giving a preview of what the State of the Union was going to be, and the one thing they all said is that oh, we're going to see a positive optimistic vision. It's a kind of tonal setting for the campaign, the rosier view, so you can say these are the triumphs. These are the things that were difficult for Democrats to look too frustrated and sit there with their hand underneath their seats not clapping for him. To it's a kind of a bit more of a rallying point speech.

I suspect you may hear it once or twice. I don't think you're going to hear it more than that. Doesn't mean you're not going to hear that point hit over and over again, particularly depending on who the candidate is, depending on the policies that end up becoming a point later in the campaign. But to come in really early now and attacking on the social front, frankly, is spending a talking point before it's really ripe, right? Like you don't even have the candidate yet, you don't even have the specific set of Democratic policies that are going to be their forerunner's.

And right now you have the Iowa debacle, you have impeachment -- which I do suspect you're going to hear President Trump take a few wallops at, for reasons that have nothing to do with socialism, and those are points that are not going to stay ripe that much longer.

So insofar as you're going to see a couple of divisive points, I don't think it's going to be a real focus. I think they're going to hit those two and the socialism divisional points are going to come a bit later.

MR. CHECCO: Right, it will be an opportunity to plant some seeds --

MS. LEE: Right.

MR. CHECCO: (Inaudible).

MS. LEE: Yeah, I mean, yeah, I was going to say -- if you want to go down the line.

MS. KAMARCK: He might plant some seeds and then watch for the tweets, right.

MS. LEE: Yeah.

MR. RAY: Yeah.

MS. KAMARCK: Right? That's where I think he'll start to do it.

MR. ANDERSON: I think you're right.

MS. RAY: Hold on. I'm sorry, Elaine, can I make two quick points?

MS. KAMARCK: Oh, yeah, sure.

MR. RAY: Sorry, just on this point. To Scott's point about this is why -- and what Nicol said about watching it is so important -- because when you watch it and then you see the media coverage of it, those could be two drastically different things. So he might only mention socialism, to Scott's point, a couple of times, but the media might really play that up. So if people didn't have a chance to watch it, that becomes part of the narrative.

The other thing that I'm curious about, and no one has really talked about up to this point, we've been framing the Democratic Party in one particular way -- I'm really curious if he's going to mention Bloomberg at all. So I mean like what happened last night potentially allows an alley for Bloomberg that we haven't really talked about. And the thing that Bloomberg has been doing that I know, because I do a lot of stuff on kind of local levels and states, he's been going around to mostly southern states that have black mayors and they've been endorsing him. In fact, our D.C. mayor just endorsed him the other day.

And so I'm curious, considering their contentious relationship -- when he mentions say criminal justice reform, he talks about stop and frisk and frames Democrats, if he's going to also blame Bloomberg, who of course was one of the architects of that.

So I think to the point is, he's not -- as Scott was saying -- he's not going to talk about problems and things that's going on. And as Jon said, he's going to look back and talk about look at all the great things I've done. So, for farmers and rural areas, he hasn't done a lot there. Like they've been struggling. I'm unsure how much he's going to really talk about that, unless he's going to say I'm going to continue to do this, Democrats have put a road block up and I'm going to continue to make sure I help you.

But I think it's going be curious to watch it and then see the media framing of it.

MS. LEE: That's right. Here I'm -- Elaine, we've got -- and then I want to --

MS. KAMARCK: Yeah. Oh, Jon, yes.

MR. VALANT: So I agree and I think that's a narrative we'll see unfold. I think another one the Democrats might have handed him yesterday is the claim of mismanagement and incompetence based on not being able to pull off the Iowa Caucus in the way that they had intended. So I think -- I don't

know if that will rise to the level of a State of the Union speech, but I would imagine he will keep hitting that note.

MS. LEE: And I just wanted to quickly respond to Scott's point and it kind of goes to your -- I think we need to be realistic that he's going to be sitting among his peers who just tried to impeach him. And I think there is going to be a tone set of people who have just come out of a rigorous process that are probably going to hear an acquittal potentially tomorrow that are not going to be happy tonight. And I think he's going to play up a lot on that.

So I actually think it's not going to be the typical State of the Union where, you know, the president delivers a speech, lays out his policy, I think there's going to be a lot of tension in that room because he not only, you know, has sort of been away from this process, the Republican Party has been very unified, and he has also name called, you know, from Schiff to Pelosi. I really think it's going to be interesting to watch how the Democrats maintain face --

SPEAKER: (Inaudible) if he loses.

MS. KAMARCK: Yeah. Oh, yeah.

MS. LEE: -- in light of, you now, how this whole trial has happened in the midst of a State of the Union.

So, Scott, I agree with you that it shouldn't be, you know, too much, but I really think that it's going to be really interesting to watch how that interaction happens in terms of if they even clap at all the places they should clap at.

MS. KAMARCK: Yeah, that's right.

MS. LEE: Given that this is still part of a contentious process.

MS. KAMARCK: Yes, Scott.

MR. ANDERSON: I would agree with that, but the one thing I do think we want to bear on is that impeachment ends tomorrow, not already. And that's a big deal, because they are still at a point right now where Senator McConnell has a lot of influence over -- even if it's just one or two votes in the Senate that can make this look more or less like a partisan impeachment. And we've heard from a lot of Republican leaders already to say we don't want impeachment in the speech, we don't want to talk about it right, because they think it's a difficult point for them and they don't want to -- now, this president

likes to gloat, right?

MS. LEE: I was going to say (inaudible) about a different person.

MR. ANDERSON: The fact is I don't think they're going to win that fight. I think he's going to talk about it.

MS. LEE: I think he's going to talk about it too. I think if he doesn't say it directly, he's going to have that like, you know, Cheshire cat grin on.

MR. ANDERSON: I think he's going to say it directly. Yeah. He's going to talk about it, but he's not going to be able to do what he would want to do otherwise, right.

MS. LEE: Yes, yes.

MR. ANDERSON: It's not going to be a tweet storm, it's going to be something else, both because it's the State of the Union, he's more disciplined, and because the Republicans won't let it happen and they still have that little bit of leverage. I don't think it's coincidence they still have that little bit of leverage.

So I don't think we're going to see the full Trump on this one. I think that will come, again, tweets, later speeches, things like that. But certainly I don't think he's going to be able to resist mentioning it.

MS. LEE: Well, we'll compare notes in the morning over a cup of coffee. (Laughter)

MS. KAMARCK: Let's see, back here. No question?

SPEAKER: It was about impeachment.

MS. KAMARCK: It was impeachment, right. Okay. Right here, the gentlemen right up here.

SPEAKER: Yeah, thank you. You haven't mentioned tax policy. Clearly Trump's -- one of his successes that he claims is this tax reform and reducing rates, corporations, et cetera, et cetera, and how it's benefitting everybody and the middle class particularly, when in everything you read says, no, 87 percent of it is going to the wealthy. He's going to say creating jobs, manufacturing -- the manufacturing index is going down, not up. We're losing manufacturing jobs. The idea of increasing the deficit.

MS. LEE: Yes.

SPEAKER: Which was, you know, for the Republicans that was the anathema. Paul Ryan -- you know, I mean they've all become hypocritical, let me put it that way. But he can talk about it and he can boast about it, but how does one discern how much he's lying about it because the facts don't carry it? They don't, in fact, prove out to be what he said and he hopes, in addition to which we're collecting a lot less revenue, which increases the deficit even more. Okay, I quit.

MS. KAMARCK: All right. (Laughter) Well, you're right.

MS. LEE: Right on.

MS. KAMARCK: The economists here at Brookings would agree with you that in fact the tax policy hasn't in fact contributed to job creation. But, you know, this is a matter of faith among Republicans. It goes back way before Donald Trump, that lowering taxes will be good for the economy.

SPEAKER: But not for the deficit.

MS. KAMARCK: Well, that's right. And they're just going to conveniently ignore the deficit. Notice that there's nobody left in the Republican Party who seems to care about deficits. And barely anybody left in the Democratic Party for that matter. So it's the issue that has just fallen off the table in the last decade, really, interestingly enough. And I don't know when it gets back on -- what will have to happen for it to get back on.

But I suspect that you'll hear tax policy only in a very laudatory way, only in look at what a great success. And he will tie it to things that most people don't tie it to, but he will make that case. And I think it's an easy one to make for his base and for a lot of Americans for that matter. I mean I think it's easy politics and it will happen.

MS. LEE: And I was going to say too on the debt reduction side of it -- because I do agree with Elaine -- I think the social safety net cuts that we're seeing, like SNAP, food stamps, some of the climate cuts, he's actually going to sort of -- I think we'll hear tonight that he's doing that to reduce the deficit and not necessarily to sort of perpetuate these inequalities, but I think they will be referenced because I've seen that referenced by the administration several times, that we're not taking away food stamps because of X or cutting programs in schools or cutting the health programs in schools, we're cutting it to reduce the deficit. And so I think you'll actually see the linkage between that and then some of the environmental protection cuts with deficit reduction versus anything else.

MS. KAMARCK: Yes, right here, up front please.

SPEAKER: Do you know who's doing the Democratic response and should the Democratic response be the beginning of the electoral process just like Trump's State of the Union is the beginning?

MS. LEE: Well, it's the Michigan governor, right? That's actually two women that are actually doing it.

MS. KAMARCK: Is it two women? It's the --

MS. LEE: Yes, the one's in Spanish and one is in English.

MS. KAMARCK: Oh, so it must be the new -- is it -- who is it?

SPEAKER: It's the Texas representative.

MS. LEE: Escobar I think it is. Yes.

MS. KAMARCK: Okay.

MS. LEE: Escobar and then -- I can't remember the --

SPEAKER: Whitmer.

MS. LEE: Whitmer, yeah, from Michigan. So the Democrats have put out two women to actually give the response to that.

MS. KAMARCK: Which is interesting --

MS. LEE: It is interesting.

MS. KAMARCK: -- because the Democratic Party is overwhelmingly supported by women these days and not men.

MS. LEE: It's interesting.

MS. KAMARCK: It's a -- really, it's up to 63 percent in the Democratic Party. We haven't seen anything like this before and they obviously --

SPEAKER: Is the response going to be the beginning of the next process of the election?

MS. KAMARCK: Well, since we don't have a --

SPEAKER: We know State of the Union is the beginning of the -- the middle of --

MS. KAMARCK: Right, we know the State of the Union, but I don't -- I think it's too much

to ask for the Democratic response to be the beginning of the election campaign when we don't even have a winner out of Iowa, let alone a candidate.

On the other hand, there are certainly certain themes that all the Democrats, no matter who wins in Iowa and who eventually gets it, there are certain themes that it's pretty clear they'll run against Trump on. And it will be healthcare, it will be foreign policy, it will respect for our allies, things like that, it will be healthcare, it will be public school education. I mean there will be themes that I think we could predict right now -- gun control, choice when it comes to abortion. I mean there will be certain things that unite Democrats.

But I think for any more nuance you can't expect that from tonight because you eventually have to get that from the nominee.

Scott, you want to add something to that?

MS. ANDERSON: Well, I was just going to say we saw, I think maybe two weeks ago now -- you probably know better than I do -- but we saw the nominations come out for people who are going to help write the Democratic Party platform. And so that process has begun to percolate through the brains of the kind of party elites who are going to structure the process.

So the one thing you sometimes can get a little bit out of these things is a sense of here are the -- as Elaine said, like the key issues which they don't expect there to be any controversy around. If there are major shifts around things that make it excluded, then that could be an issue. So, you know, again, if they talk about Israeli-Palestinian peace plan, we've seen shifts around U.S. policies toward Israel on the Democratic Party platform and you may see more shifts. And it's likely to be more controversial because they candidates right now have a broader range.

So you probably are not going to see them respond to that substantively because there's going to be less confidence about what the median Democratic Party view is where they can say something confident that the party platform will eventually come out in that position.

I mean there is a lot they can still say about Israel because they are still a strong ally. Nobody is walking back from that talking point. That's just an example that jumps immediately to mind because I work on Middle East stuff.

So there's a little bit of, you know, maybe forecasting or dividing rod that you can get from

that, but not much otherwise.

MS. KAMARCK: Okay. Rashawn?

MS. LEE: Oh, and I --

MS. KAMARCK: Jon, did you want to --

MR. VALANT: No, go ahead.

MS. KAMARCK: No, okay. Rashawn?

MR. RAY: Yeah, I was just going to say, I mean what I'm really curious about, in addition to the responses -- so, for example, like Ayanna Pressley is giving like the working family's party response. So when I think about that, are people -- the way that people don't necessarily watch TV in the same way. That means that social media and then kind of cable news media being channeled through social media, is going to play a larger role. So I think about what are these two minute clips that are going to be shown and who is going to be shown as giving them? Of course we have these two or three women that are going to be giving these responses, but what are going to be the sound bites that are going to reach a large number of Americans?

And I do think these are the key issues, but as a person similar to Nicol who studies technology and algorithms and social media, I think about we can't downplay the extent to which that matters because that's one of the reasons why Trump was able to win in 2016, was the way he was able to leverage social media and the way that algorithms work. And so I think we, in addition to us watching it, also have to pay attention to the media coverage and in the social media coverage in terms of what are people clicking on, what are they paying attention to. And I think that will give us a pulse for what people take away from tonight.

MS. LEE: And I would say too -- I mean I would hope that in the Democratic response that they will get at issues that -- going back to the gentleman's idea about social inequality, gun reform being one of the issues, you know, safe communities, safe families. I mean I think we have seen hate crimes actually elevate under Trump. We've also seen, you know, violence in schools, violence in communities. I mean it's a regular everyday occurrence that we're seeing these regular shootings. I think the Democrats -- the potential misstep of having two middle aged women do this is that they're still missing out on the millennial vote. And I think that's going to be interesting I think, going to what

Rashawn talks about, how social media picks up on that, because now we're seeing the Party in and of itself having different viewpoints. So people going to hear Ayanna's opinion and her endorsement of Bernie --

SPEAKER: Right.

MS. LEE: Or people going to hear what AOC has to say about it is going to be a very different landscape than we've had in the past where we've had a much more unified Party or a Party who has adjusted to the various attributes and, you know, opinions of people. So I think it's going to be interesting, Elaine, to see how even the two women resonate with many of those people that were at the Caucus yesterday that were young people.

MS. KAMARCK: Well, actually, most of the people at the Caucus were old.

SPEAKER: Yeah, they were old.

MS. KAMARCK: Actually, 33 percent were over --

MS. LEE: Well, I was thinking about those Bernie people that were the young people that--

MS. KAMARCK: Right.

MS. LEE: When the older people started sitting on the floor and the younger people started standing up. (Laughter)

MS. KAMARCK: That's right. That's exactly right.

MS. LEE: After the hours of sitting there.

MS. KAMARCK: That's the difference.

MS. LEE: I said to myself (inaudible). (Laughter)

MS. KAMARCK: Okay, another question right here, up here.

SPEAKER: Hi, I'm Roma (phonetic). I'm an intern in Governance Studies.

On the media response note, in the past -- correct me if I'm wrong -- but it seems like the State of the Union has been a guaranteed news story for the president, whereas there might not be -- they might be in the news otherwise, whereas with this president it seems like he's in the news all the time, we know what he's thinking on Twitter all the time. So what role will tonight's speech play in setting the public agenda, changing the national conversation? Ad is this year's speech going to be different in

the role that it plays, as opposed to either previous year or previous presidents?

MS. KAMARCK: Jon?

MR. VALANT: So a couple of thoughts on that.

So I think it's important to remember in this moment in time the way people consume media and the sort of lenses through which we see things, like State of the Unions, will be -- a lot of people are going to watch the State of the Union address and then they're going to change the channel to their preferred cable news network or they're going to go and they're going to jump on Twitter and they're going to see what people who agree with them are saying about what's going on.

So there is not a single lens or filter through which we're seeing these things. We break off afterward. In some ways I think that response is actually more important than the Democratic response because that is -- sort of what we hear when we move into our own bubbles is what -- you know, whether we know it or not shapes a lot of our thinking on these kind of things.

MS. KAMARCK: Any others? All right, let's take one final question back there.

SPEAKER: I have one follow up to the question on the responses. You have a governor of Michigan and a representative from Texas. Is this the Democrats best chance to explain how they made USMCA better to the American public, or have they completely tuned it? And as a Canadian I'm just too in the weeds in that.

MS. KAMARCK: How they make U.S.? I didn't get that.

MR. ANDERSON: How the Democrats made the trade deal better.

SPEAKER: The four trade deals the Democrats made.

MS. KAMARCK: Oh, the trade deal, better, yeah. (Laughing)

SPEAKER: Because that was a very large piece of the trade deal.

MS. KAMARCK: Yeah, that's good.

SPEAKER: I mean Michigan and Texas.

MR. ANDERSON: That's a really insightful point.

MS. KAMARCK: Scott?

MR. ANDERSON: I mean I --

MS. LEE: Type of point.

MR. ANDERSON: Yeah. And it very well may be. I mean certainly there is something that they can -- certainly the governor -- you would think the representative probably can speak to quite credibly and possibly with personal experience.

Just to fill folks in essentially, the Democrats have a very credible argument that they negotiated for some substantial changes and conditions in the USMCA, the replacement for NAFTA trade agreement, but President Trump has generally been trumpeting it as a success for him without acknowledging these very concessions they made to get it passed.

That's a good point. That is definitely a talking point that's going to come in for the Democrats. I think it really depends on how central USMCA plays in President Trump's State of the Union address. I suspect it will play a pretty central role because it's recent, it is apparently a big delivery on a promise. Trade issues are something that speaks very strongly to that, you know, core -- that part of his voters that is the kind of swing pocket. So, yeah, I would be surprised if that may be a major part of that. I don't know if that's why they chose those two representatives, but it might have been.

MS. LEE: Yeah. I mean from what I've read so far, Chuck Schumer, you know, handpicked Michigan, probably for some of those reasons as well, based on where they've been economy-wise, et cetera. So we'll see, you know, how well she represents that as a -- I think she's a governor, right? A governor actually.

MS. KAMARCK: Yeah. And Michigan is -- of the three critical states that Hillary Clinton lost in 2016, Michigan is the most likely to switch from red to blue in 2020. So it makes sense to feature the Michigan governor and tell Michigan's story from a Democratic point of view.

MS. LEE: So, you know, Elaine, we forgot that he also mentioned that we didn't bring up is that wall.

MS. KAMARCK: The what?

MS. LEE: The wall.

MS. KAMARCK: The wall.

MS. LEE: So I think we'll probably get a progress report on the wall.

MS. KAMARCK: We'll probably get a progress report on the wall, although it is interesting to me how little we've heard --

MS. LEE: Exactly.

MS. KAMARCK: -- about immigration and the wall. Even in some of his rallies, where he tends to bring up all the old goodies -- and I just wonder if they're trying to discipline him to stay away from some of those red meat issues which may motivate his base but also turn off that little sliver of swing voters that he need to win.

MS. KAMARCK: We have time for one final question. Yes, right here.

SPEAKER: Climate change.

MS. KAMARCK: Climate change.

SPEAKER: (Inaudible) for, you know, all of that, and particularly the millennials --

MS. KAMARCK: Yeah.

SPEAKER: -- should be concerned. And we know he's a climate denier per se, and maybe he'll just ignore the whole thing, but I'd just be curious what you think. What can he say about it that really sort of resonates with -- it seems to me even most of America, but the rest of the world. Or can he just ignore it?

MR. RAY: You know, the way Trump's mind seems to work, what popped in my head when he -- what I think he would think about when he thinks of climate change is space travel. Like he's just going to say oh, yeah, I've like revitalized NASA, we're going to outer space. I mean things that he doesn't believe in and that he just doesn't think about, he just chooses not to address or he dismisses them so much.

And I think to Scott's point, I mean we could see him the way he's done these other State of Union addresses be directly on target. But this potentially could be his last one and the thing about Trump is, I mean sometimes we just don't know. So I mean on one hand we could see it being the same, but this might be a little different. We had the Iowa debacle last night, the impeachment, final vote hasn't happened. I mean we just don't know.

But I think with climate change, I mean I'm unsure how much he necessarily brings it up. But what popped in my head was I could definitely see him saying, you know, look at what we're doing, we're back I this kind of international race to think about what's happening beyond earth. I mean that's the kind of ways he things.

MS. LEE: Right. And I would say --

MR. ANDERSON: I think that --

MS. LEE: -- Oh, go ahead, Scott.

MR. ANDERSON: Well, I was going to say, I mean it is actually very similar to the tax policy question I think that you have because this feeds into an idea of kind of Republican Party orthodoxy that has survived the Trump revolution, which is when you hear low unemployment, that is talking about tax policy and climate change, because it means deregulation and good economic performance for a big part of the electorate that he's trying to speak to. When you see good economic change and it correlates with changes in tax policy and a deregulatory environment, they link those two.

So I think that's how you're going to hear it talked about, is by economic performance. He's going to say our economy is doing well and a lot of the people in his Party who he is trying to communicate to are going to hear that and they say, oh, yeah, it's because we passed tax policy and we're deregulating things.

I don't think he's going to deal with it more expressly than that. You may see some variant of the elliptical false prophets of doom line that he broke out in criticizing Greta Thunberg and has talked about once or twice, kind of saying how, oh, there are these people out there who are naysayers about a bunch of different things, I am a disruptive president, I'm breaking free from that orthodoxy. And that will be about climate change and a few other things. But other than that, I don't think he's going to talk about it.

MS. LEE: I would say climate change is actually, I think, going to be one of the big issues in the upcoming election, right. How any presidential candidate deals with climate change I think is going to be one of the deal breakers.

I think for his sake, and I want to echo what my colleague said, I think because -- and as we spoke who he's signaling to, you know, a lot of the climate change roadblocks have actually helped private sector industry and others who have been able to push forward either innovation or building or, you know, industrialization to the effects of consumers or residents that are there.

And so, again, I think we'll hear it in a deregulatory framework without him taking it on full on. But there's been a lot of rollbacks that people aren't paying attention to. I mean the vulnerability

under this administration to have a recreation of Flint is just one step away -- in fact I just saw an article where that's happening. It's in Detroit or someplace else where they're finding the same type of spoilage in their water systems. But for this president, climate change is almost like an enigma to innovation and new technologies. And so that's why we've seen this quiet rollback of things to get quicker passage of new products, even though they're polluting the environment.

So, again, I think it goes back to that signaling of various constituents who will be watching today to see how the president is going to continue along that pathway of deregulation to make sure that he's assuring their vote going forward.

MS. KAMARCK: Thank you very much for the people in the room and our online audience. (Applause) And thank you to Jon, and Nicol, Rashawn, and Scott. And tune in tonight for the State of the Union.

* * * * *

CERTIFICATE OF NOTARY PUBLIC

I, Carleton J. Anderson, III do hereby certify that the forgoing electronic file when originally transmitted was reduced to text at my direction; that said transcript is a true record of the proceedings therein referenced; that I am neither counsel for, related to, nor employed by any of the parties to the action in which these proceedings were taken; and, furthermore, that I am neither a relative or employee of any attorney or counsel employed by the parties hereto, nor financially or otherwise interested in the outcome of this action.

Carleton J. Anderson, III

(Signature and Seal on File)

Notary Public in and for the Commonwealth of Virginia

Commission No. 351998

Expires: November 30, 2020