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9B21E005

When Trump Wins in Democratic Iowa Caucus: IT Project Risk Assessment[[1]](#endnote-1)

Cem Torun wrote this case under the supervision of Professor Yasser Rahrovani solely to provide material for class discussion. The authors do not intend to illustrate either effective or ineffective handling of a managerial situation. The authors may have disguised certain names and other identifying information to protect confidentiality.

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The Democrat Caucus is an unmitigated disaster. Nothing works, just like they ran the Country. Remember the 5 Billion Dollar Obamacare Website, that should have cost 2% of that. The only person that can claim a very big victory in Iowa last night is “Trump.”[[2]](#endnote-2)

US President Donald Trump on the Iowa Caucus

On February 3, 2020, the 2020 Iowa caucus occurred. This was the first nominating contest that took place in the primaries of the Democratic Party for the 2020 presidential election. The use of a vote-counting application (app), which originally seemed like a good idea, had resulted in a catastrophe and political ridicule for the Democratic Party. The new 2020 Iowa caucus was meant to increase voter transparency as well as credibility for and confidence in the Democratic Party, but it had done the opposite. Following the night’s events, Democratic Party candidate Bernie Sanders said, “All I can say about Iowa is, it was an embarrassment. It was a disgrace to the good people of Iowa who take their responsibilities in the caucuses very seriously. They screwed it up badly, that is what the Iowa Democratic Party did.”[[3]](#endnote-3)

Iowa Democratic Party (IDP) officials needed to ensure that this type of mishap would be avoided going forward. How, exactly, had the catastrophe come to be? What should IDP officials do to ensure a more successful information technology (IT) implementation process in the future?

The US Presidential Election Process

The first US presidential election took place on January 7, 1789, when George Washington was elected as the first president of the United States of America.[[4]](#endnote-4) As it did in 1789, the United States continued to use the Electoral College system, which gave citizens above the age of 18 the right to vote for electors, who in turn voted for the president.[[5]](#endnote-5) The Electoral College comprised a group of individuals selected by each state who elected the vice president and the president.[[6]](#endnote-6) Each of the 50 states received a predefined number of electors, based on the state’s population size, to put toward the Electoral College. In essence, voters were not directly voting to elect the president; rather, they voted for electors/delegates who, in turn, voted to elect the president.[[7]](#endnote-7) The election process began with primary elections and caucuses with the goal of selecting party leaders, both Democrat and Republican.[[8]](#endnote-8)

Primaries and caucuses were the two ways in which the Democratic and Republican parties chose the delegates who would attend the parties’ national conventions, where the delegates officially chose each party’s nominee for the presidential race. A *primary* was an election at the state level where the members of a particular party voted to choose a candidate for their political party. The selected members from these primaries then ran against each other in a general election.[[9]](#endnote-9)

Some of the most drastic changes to the US election process occurred in the 1960s. During this decade, most states did not hold primaries or caucuses. Instead, at the national convention, the presidential nominee was picked by the respective party leaders. A critical reason for this was that voter engagement in the voting process at that time was much lower than it is today. Before the 1960s, the people in charge were picking the people to stay in charge. This was mostly undisrupted until 1968, when in the few primaries across a subset of all 50 states, young Democrats voted in great numbers against the candidates who were in favour of the Vietnam War. However, at the national convention, presidential and vice-presidential nominees who were pro-war were chosen by the party delegate. This was not well received by voters, and protests erupted across the country. These protests were incredibly effective, ultimately serving as a catalyst for changing the way elections were being held. The Democratic Party soon allowed the voters pick the nominee through delegates, with voters in each state, and Republicans eventually adopted the same solution. Today, the delegates from each state were still the ones officially voting at the national convention for the nominee⎯but they had to vote according to the how the candidates had fared in their state elections.[[10]](#endnote-10)

Thirty-four US states conducted primary elections.[[11]](#endnote-11) A *caucus* was a local meeting where the members registered to a political party in a city, town, or county came together and voted for their preferred party candidate.[[12]](#endnote-12) Caucuses were often used in combination with a state convention as a way to elect delegates to the national convention for the purpose of selecting the president.[[13]](#endnote-13) While primaries and caucuses were executed in different ways, they had the same function: they let the states choose the nominees for the major political parties, with the purpose of attending the general election.[[14]](#endnote-14) To win the nomination, candidates needed a majority of the total delegates, and the states that had larger populations (as calculated by the census every 10 years) had more delegates; these delegates were selected within the primaries and caucuses across the country.[[15]](#endnote-15) A state such as Iowa, for example, had only 41 delegates, compared to a state such as Florida, which had 219.[[16]](#endnote-16) Nonetheless, Iowa played an important role in the election process, as did other small states that voted early in the process.[[17]](#endnote-17)

The US election process was far from perfect, with one major complaint being the length of the process.[[18]](#endnote-18) Whether you measured it from the first candidate’s entry or the first caucus, the US campaign season was significantly longer than that of many other countries (see Exhibit 1).[[19]](#endnote-19) There had also been reform requests surrounding the role money played in politics.[[20]](#endnote-20) The US system essentially required candidates to raise millions of dollars to even mount a serious run, and often, the capital raised came from wealthy individuals who donated to the candidates whose beliefs coincided with their own.[[21]](#endnote-21)

The Iowa Caucus

The Iowa caucus represented the first chance for American citizens from both major political parties to show support for a presidential candidate. The national press coverage of the caucus captured every minute of excitement as hopeful presidential candidates spread out across all 99 Iowa counties in an attempt to win over American citizens at local dinners and in elementary school gyms.[[22]](#endnote-22) The Iowa caucus was the first event in the election season, acting as a bellwether of national sentiment.[[23]](#endnote-23) It was a source of significant momentum that could propel a candidate into the public eye.[[24]](#endnote-24) Following violence over the Vietnam War and combined with racial tensions following the 1968 Democratic National Convention, the Democratic Party, along with the State of Iowa, decided to become more involved in the nomination process.[[25]](#endnote-25) They planned to distribute the presidential nominating schedule to each of the states, such that there were multiple election days across the country.[[26]](#endnote-26) Iowa had a more complex process compared to other states, involving precinct caucuses, county and district conventions, and finally, a state convention; this process took longer to complete in Iowa than it did in other states, so it had to start early.[[27]](#endnote-27) Political columnist Kathy O’Bradovich remarked, “The really important thing to remember about Iowa is not that it’s first because it’s important. Iowa is important because it’s first.”[[28]](#endnote-28)

The current vote collection system employed manual counting. This method, synonymous with hand-counting, required a physical ballot that represented voter intent. Following their collection, the physical ballots were taken out of the ballot boxes or envelopes, read, and interpreted; the results were then tallied and, finally, reported.[[29]](#endnote-29)

Technology to the rescue!

In 2016, both Democrats and Republicans faced contested caucuses, with the memory of the botched 2012 Republican Iowa caucus still lingering. Mitt Romney had been incorrectly declared the winner of the 2012 Republican Iowa caucus, surpassing Rick Santorum, the Republican runner-up, by eight votes. However, upon official counting, Santorum was found to have obtained 34 more votes than Romney; consequently, Santorum was declared the official winner after problems with conflicting reports were resolved.[[30]](#endnote-30)

Moving forward, the IDP wanted to deploy a mobile app that could be used by precinct chairs (elected local officials in the American political party system) to calculate and report results—presumably faster and more accurately—and that could present a way to avoid repeating past mistakes.[[31]](#endnote-31) From this desire rose the decision for the IDP to partner with Microsoft Corporation (Microsoft), which contracted a company called InterKnowlogy to build the app and other digital caucus infrastructure using Microsoft’s technology.[[32]](#endnote-32)

In 2016, Microsoft partnered with InterKnowlogy for the development of the technology used to power the Iowa caucuses.[[33]](#endnote-33) Together, and with oversight from members of the Iowa Caucus committee, Microsoft and InterKnowlogy built an app that recorded results securely and accurately. The app had a dual authentication process which ensured that precinct chairs were approved to submit results from precincts across the state. InterKnowlogy supported the building and development of the app’s features,[[34]](#endnote-34) and Microsoft was responsible for supporting the build and testing the app to ensure the whole process would be smooth and error-free.[[35]](#endnote-35)

However, following the 2016 caucus, not everyone was content. While the app had worked as intended, members wanted more transparency moving forward for the 2020 Iowa caucuses, with the purpose of removing a supposed veil of secrecy following claims of wrongdoing in the 2016 election, in which Bernie Sanders narrowly lost to Hillary Clinton when both Democratic candidates were competing at the 2016 Iowa Democratic caucuses.[[36]](#endnote-36) Believing he should have won, Sanders called for a recount, but in 2016 there was no mechanism by which Iowa Democrats could recount caucus results because the state party did not maintain paper records of the results.[[37]](#endnote-37) For 2020, the Democratic National Committee (DNC) implemented a new set of reporting requirements that insisted that the IDP publish the raw vote totals.[[38]](#endnote-38)

Changing Vendors

In the two months leading up to the 2020 Iowa caucuses, the Democratic Party decided to switch technology vendors for its app, from the Microsoft/InterKnowlogy pairing to Shadow Inc. (Shadow).[[39]](#endnote-39) It was unclear why the IDP did not keep the same app⎯one created by an established company⎯and instead pursued that of an untested start-up. Microsoft clarified that it did not make the app for the 2020 Iowa caucuses when a company spokesperson tweeted, “We had a great partnership with the Iowa political parties in 2016, but we are not part of the caucuses this year and have not been involved in building or supporting their app.”[[40]](#endnote-40)

The decision to switch technology vendors (and apps) was likely attractive to the IDP for many reasons. For one thing, the IDP paid relatively little⎯US$63,000, as recorded by the Federal Election Commission⎯for customized technology services.[[41]](#endnote-41) Moreover, the 2016 app and the 2020 app had similar requirements, and while their functions were not complicated, there had to be several versions of the same app for different operating systems and devices.[[42]](#endnote-42) The first use of the app would be when the app’s proper functioning mattered most.[[43]](#endnote-43) There would be no time to roll out updates and improvements. IDP had to get it right the first time, and if it did not, the consequences would be very public.[[44]](#endnote-44) The fact that the 2016 and 2020 apps were fairly similar from a technical standpoint, and the low cost that Shadow had agreed to, made the deal attractive for the IDP.[[45]](#endnote-45) However, political affiliations might have played a role in the decision.

What is Shadow?

During a lacklustre lead up to the caucuses, what had seemed like an easy process for InterKnowlogy and Microsoft seemed to present misgivings at every turn for Shadow. Why had the DNC, along with members of the IDP, selected Shadow⎯an untested company whose ability to carry the heavy responsibility of providing technology was unknown⎯for a caucus? The answer possibly lay in Shadow’s extensive ties to high-profile and influential democrats of executives from Acronym.[[46]](#endnote-46) Shadow was highly connected to and a subsidiary of Acronym, a “values-driven” non-profit organization aiming to “educate, inspire, register, and mobilize voters” that was contracted by the DNC for the caucus.[[47]](#endnote-47)

Shadow’s chief executive officer (CEO), Gerard Niemira, stated on his LinkedIn page that he had “[led a] small but mighty team” for Hillary Clinton’s “Hillary for America” campaign in 2016. Shadow’s chief operating officer (COO), James Hickey, had also worked for the Clinton campaign, as an engineering manager.[[48]](#endnote-48) Acronym’s COO, Kim Peyser, was a former Obama administration official, and its training manager, Andrea Ramos, had been the digital organizing director for the 2020 campaign of Elizabeth Warren, a 2020 Democratic candidate.[[49]](#endnote-49) Tara McGowan, a Democratic-affiliated political strategist and the CEO of Acronym, was married to a senior aide in the campaign of Pete Buttigieg, another 2020 Democratic candidate—a connection that had attracted widespread attention on social media.[[50]](#endnote-50) Certain Democratic campaigns—such as those of Buttigieg and of the former vice president and current American president, Joe Bidenhad used an app built by Shadow to solicit donations and communicate with supporters via text, according to people familiar with the matter and expense records from their federal campaigns.[[51]](#endnote-51)

Whether Shadow had been chosen only because of its political affiliations with the Democratic Party or whether it was a matter of simple technological oversight, it was clear that Shadow was not ready to be the technology provider for the election, and the Iowa caucus⎯along with the democratic process⎯suffered as a result.

Leading into the Caucus

The developers at Shadow of the 2020 app had fewer resources than the 2016 developers from InterKnowlogy.[[52]](#endnote-52) Rodney Guzman, CEO of InterKnowlogy, said that the company had had about a year of lead time, where the first three months were spent on product design, meetings, usability studies, and user testing.[[53]](#endnote-53) Because of the delays in planning the Iowa caucus, Shadow personnel did not enter into a contract for the 2020 Iowa app until the fall of 2019, compressing an already tight timeline.[[54]](#endnote-54) InterKnowlogy’s lead time of three months was a longer amount of time than Shadow had *in total* to develop its app—Shadow’s developers had only two months.[[55]](#endnote-55) The extra months InterKnowlogy had given its engineers allowed them time to properly build and test the app. It had also given time to the precinct chairs who would be using the app to test and become familiar with the product.[[56]](#endnote-56) Given this shortened timeline, aspects of the IT implementation process had been overlooked the second time around, essentially taking for granted what had been done in the past.[[57]](#endnote-57)

One thing that had shocked Guzman was that Shadow had not been uploaded to the app stores of Apple Inc. (Apple) or Google LLC, the two most popular app marketplaces. Instead, users were forced to “sideload” it—basically, to download the app through a different channel.[[58]](#endnote-58) This was a difficult process for experienced smartphone users, let alone those who had hardly ever used a smartphone.[[59]](#endnote-59) The Shadow app was distributed through TestFairy Ltd. (TestFairy), a mobile app testing platform, rather than the official app stores on Android and iOS devices.[[60]](#endnote-60) Two Acronym sources, when speaking anonymously to *The New York Times*, said that the reason Shadow had released the app through TestFairy was that it had run out of time for the app stores to approve it.[[61]](#endnote-61) Uploading to these app stores, specifically those of Android and iOS, required a more stringent and detailed app review in order to ensure safety for users downloading developers’ apps.[[62]](#endnote-62) As pointed out in Apple’s app security overview, “Apps are among the most critical elements of a modern security architecture. While apps provide amazing productivity benefits for users, they also have the potential to negatively impact system security, stability, and user data if they’re not handled properly.”[[63]](#endnote-63)

Leading up to the 2020 caucus, security experts warned the IDP that the app had not been stress tested and was not prepared for state-wide use.[[64]](#endnote-64) Iowa was urged by Bob Lord, the DNC’s cybersecurity chief, to drop its plans to use the app. This request was ignored, according to people familiar with the matter.[[65]](#endnote-65) In November, Iowa officials gathered in Des Moines with the purpose of testing the processes involved in the caucuses. However, the app was not included as part of the test.[[66]](#endnote-66)

During the Caucus

Problems with the app arose on the Monday before voting even started. Certain precinct chairs mentioned they were having trouble downloading or logging on to the app. The IDP said these issues were arising because of poor cell service in certain areas, along with certain minor bugs that were being resolved. Moreover, certain precinct officials in rural areas had only recently become aware that there even was a mobile app. Many others had received no training on how to use the app and subsequently decided not to use it.[[67]](#endnote-67)

When the time finally came to, hopefully rise above the troubles of the past couple months and collect the votes for the 600,000 eligible Iowa Democratic voters, everything fell apart.[[68]](#endnote-68)

There were warning signs of problems as soon as the first results came in from the new app. While the raw data seemed fine, there was a high error rate. There were issues with the process of transmitting the results for display, and no one could figure out why this problem was occurring.[[69]](#endnote-69)

As voters came together in groups to demonstrate their support for their candidate, the precinct chairs filled out worksheets with the results. There were two ways the results could be reported. The main way was via the mobile phone app. However, because many of the precinct chairs were having problems either downloading the app or using it, this option was ineffective and unreliable. Reporting results via a phone hotline was meant to be the backup option, but because the app was not working as intended, many precinct chairs had to call the hotline, overloading the phone lines. Additionally, unlike in previous years, three sets of numbers had to be reported instead of just one number. Of her experience with the app, Worth County Party Chair Jane Podgorniak said, “I couldn’t get it to work,” adding, “I tried and tried.”[[70]](#endnote-70)

Sean Bagniewski, Polk County chairman, said, “When you have an app that you’re sending out to 1,700 people and many of them might be newer to apps and that kind of stuff, it might have been worth doing a couple months’ worth of testing to make sure it is working correctly.”[[71]](#endnote-71)

Not only was the app not working as intended, but as a consequence of the problems, the backup phone system was overwhelmed.[[72]](#endnote-72) Shawn Sebastian, a precinct secretary, told CNN (Cable News Network) at about 11:00 p.m., “The hotline has not been responsive”; he had been left on hold for over an hour when attempting to report his results.[[73]](#endnote-73)

Post-Caucus

Shadow put out the following apology on Twitter Tuesday afternoon: “We sincerely regret the delay in the reporting of the results of last night’s Iowa caucuses and the uncertainty it has caused to the candidates, their campaigns, and Democratic caucus-goers.”[[74]](#endnote-74) More importantly, an analysis by *The New York Times* revealed inconsistencies in the reported data for several hundred of the state’s precincts: “Those errors occurred at every stage of the tabulation process: in recording votes, in calculating and awarding delegates, and in entering the data into the state party’s database.”[[75]](#endnote-75)

In *The New York Times*’ review of the data, 10 per cent of precincts, at a minimum, seemed to have allocated their delegates improperly. In certain cases, precincts awarded fewer delegates than they had; in others, they awarded more.[[76]](#endnote-76) The party was still releasing results up to Wednesday night, even though the caucus had been held on Monday, bringing the total of statewide precincts reporting to 97 per cent.[[77]](#endnote-77)

The effects of this technology mishap could not be understated. What had begun as a way to increase transparency ultimately resulted in a mockery and in the unreliability of the caucus results. Moreover, an event that had been meant to market and raise excitement about a competitor to Donald Trump ended up worsening the Democratic Party’s chances of winning the upcoming 2020 general election. President Trump thus found himself in a strikingly strong position as his re-election campaign got underway in earnest.[[78]](#endnote-78)

Conclusion

One thing about the app fiasco was certain: this would be one of the largest Democratic failures since the Obamacare website crash, and it would continue to be a talking point for years to come. The 2020 Iowa Democratic caucus had jeopardized the bedrock of democracy. Technology had been brought in to add transparency to the election process but had clouded it instead. Buttigieg, the winner of the Iowa caucus, had his victory questioned and undermined, all because of one app.[[79]](#endnote-79) What seemed like a bargain for the IDP had turned into a national fiasco.

Who had failed: the people or the technology? Who was responsible: the Democratic Party, the IDP, the DNC, Shadow, or Acronym?

Had outsourcing the creation of the app been the right call? Should the IDP have looked to build the app themselves with in-house talent? Had it been a high-risk implementation? How could the risks have been mitigated? Going forward, how could organizers avoid a similar situation?

Exhibit 1: NATIONAL ELECTION CAMPAIGN LENGTH

Note: UK = United Kingdom; US = United States; cand. = candidate.

Source: Danielle Kurtzleben, "Why Are US Elections So Much Longer Than Other Countries’?," NPR, October 21, 2015, accessed January 6, 2021, www.npr.org/sections/itsallpolitics/2015/10/21/450238156/canadas-11-week-campaign-reminds-us-that-american-elections-are-much-longer.

Endnotes

1. This case has been written on the basis of published sources only. Consequently, the interpretation and perspectives presented in this case are not necessarily those of the Iowa Democratic caucuses or any of its representatives. [↑](#endnote-ref-1)
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4. “First US Presidential Election,” History.com, November 24, 2009, accessed January 6, 2021, [www.history.com/this-day-in-history/first-u-s-presidential-election](https://www.history.com/this-day-in-history/first-u-s-presidential-election). [↑](#endnote-ref-4)
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6. “Does Your Vote Count? The Electoral College Explained - Christina Greer,” YouTube video, 5:21, posted by “TED-Ed,” November 1, 2012, accessed January 6, 2021, [www.youtube.com/watch?v=W9H3gvnN468&t=236s&ab\_channel=TED-Ed](https://www.youtube.com/watch?v=W9H3gvnN468&t=236s&ab_channel=TED-Ed). [↑](#endnote-ref-6)
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9. Kirk Bailey, “What is the Difference between a Primary Election and a Caucus?,” Dummies, accessed January 8, 2021, www.dummies.com/education/politics-government/what-is-the-difference-between-a-primary-election-and-a-caucus/. [↑](#endnote-ref-9)
10. “America’s Presidential Primaries, Explained,” op. cit. [↑](#endnote-ref-10)
11. Roos, op. cit. [↑](#endnote-ref-11)
12. Ibid. [↑](#endnote-ref-12)
13. Ibid. [↑](#endnote-ref-13)
14. “Presidential Election Process,” USAGov, accessed January 6, 2021, [www.usa.gov/election#item-213546](https://www.usa.gov/election#item-213546). [↑](#endnote-ref-14)
15. Roos, op. cit. [↑](#endnote-ref-15)
16. “America’s Presidential Primaries, Explained,” op. cit. [↑](#endnote-ref-16)
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38. Ibid. [↑](#endnote-ref-38)
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42. Ibid. [↑](#endnote-ref-42)
43. Corasaniti, Frenkel, and Perlroth, op. cit. [↑](#endnote-ref-43)
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