

DELANO'S DEN - CAMPAIGN 2018: PREVIEW

Dear Politically Savvy Friends,

In just two weeks, some 90 million Americans are expected to go to the polls in the 2018 Mid-term Election. Sadly, that's still only 42 percent of the electorate, and, of course, voter turnout will dip and rise depending on the state and the contest. I have seen reports that turnout could be larger than normal, so who knows.

Once again, Pennsylvania is critical in whether there is really a "blue Democratic wave" sweeping the country or whether Trump Republicans & Trump Democrats will turn out to stem what everyone assumes will be GOP electoral losses on November 6.

Will Republicans maintain control of both chambers of the U.S. Congress and the vast majority of governorships? Or will some outpouring of anti-Trump fervor sweep the Democrats into at least partial control of parts of the government?

As a TV and radio political analyst for nearly 25 years and public policy graduate school professor for almost as long, this is my periodic report to you. If you are new to receiving this, welcome. I hope you stay on board. If you are a regular, thanks for your loyalty.

As always, if you need a speaker or moderator for a public policy program or a review of what happened in this election and what it all means, send me an email at jon@jondelano.com. I love to talk politics!

My focus in this newsletter is Pennsylvania and its unique role in this unfolding political drama. A lot is at stake on November 6. Do Democrats, Republicans, and Independents who oppose President Trump and a Republican Congress (that hardly ever stands up to him) show up to vote in record numbers? Or do Republicans, Democrats, and Independents who like what the President is doing say "more of the same" for the next two years?

As I outline below, Pennsylvanians will play a key role in answering those questions.

Feel free to share this newsletter with others, and let me know what you think, give me your comments, or send me off-the-record insights at jon@jondelano.com

SUMMARY:

For the Democrats to have the slightest chance of a majority in the U.S. Senate, Bob Casey must be reelected by Pennsylvanians. For the U.S. House of Representatives to go Democratic this fall, Democrats must pick up at least four Pennsylvania congressional seats in the House. And, finally, for state Democrats to have any say in Harrisburg, especially with respect to redistricting following the 2020 Census, Gov. Tom Wolf must be reelected.

For those convinced Democrats will sweep, I would suggest a gentle reminder that this state voted for and elected Donald Trump president of the United States in 2016. Although his margin was just 44,000 votes out of 6.1 million cast, his victory, especially in western PA where he won every county except Allegheny, was impressive.

This state is always up for grabs, and the margin of victory (for either party) is almost always in the single digits. In former PA Sen. Scott Wagner and U.S. Rep. Lou Barletta, the Republicans have two credible candidates for governor and Senate, although each has flaws like the incumbents they challenge. I would not write them off just because national pundits think this will be a "Democratic" year. Pennsylvanians will make up their own minds in the next two weeks, and depending on voter turnout, the margin is likely to be closer than many think.

So let's take a better look at these contests.

GOVERNOR'S RACE HAS BEEN HO-HUM

Overview:

If anyone thought this was going to be an exciting race between two highly charged candidates for the top office in the Commonwealth, they didn't really know Gov. Tom Wolf, the Democratic incumbent. In my view, he has done everything possible to keep this race -- and his Republican opponent Scott Wagner -- below the radar screen, and Wagner has been complicit.

Oh, sure, we've seen plenty of TV ads, predictably hailing the state's top executive and attacking Wagner -- and, of course, Wagner is doing the same to Wolf, although with much less money to do so.

But the governor's strategy from the get-go was to deny Wagner any kind of "free media" platform, and that has largely worked. For his part, Wagner's free media has not really helped the challenger (e.g., "I'll stomp all over his face with golf spikes.").

Wolf broke with tradition to deny Wagner any legitimate public debate (unless you count the ludicrous Alex Trebek show at the PA Chamber of Business & Industry a "legitimate" debate when Trebek used more time to talk than either Wagner or Wolf).

Former Gov. Tom Corbett gave challenger Wolf the "traditional" three debates in 2014, but Wolf was of no mind to accord the same to Wagner. So other than their paid advertising and periodic print & broadcast stories, this race has been surprisingly docile.

Outcome:

That has to be good news for Wolf.

Only one incumbent governor has lost reelection since 1970 when PA governors were given the right to serve a second term, and that, of course, was Corbett in 2014. All the others were reelected. Some were reasonably close. Gov. Milton Shapp beat Drew Lewis by 300,000 votes in 1974; Gov. Dick Thornburgh beat Allen Ertel by just 100,000 votes in 1982.

But others were landslides. Gov. Tom Ridge beat Ivan Iltkin by nearly 800,000 votes in 1998; Gov. Ed Rendell beat Lynn Swann by 830,000 votes in 2006; and Gov. Bob Casey beat Barbara Hafer by 1.1 million votes in 1990.

It's not that Wolf's been the perfect governor. Democratic insiders complain that he is rarely strategically "political" and gets "jerked around" by the Republicans who control the General Assembly. But, in fairness, it's hard to be a Democrat in Harrisburg when the party is so weak in the state House and Senate. What surprises many is that Wolf has actually been able to make some progress on some issues with the legislature, and he has been unafraid to use "executive" power to achieve other goals.

But on the issues that Wagner complains most about -- taxes, deficits, school funding, etc. -- whatever Wolf has done (or not done) has been because of the Republican-controlled legislature.

In the larger scheme of national politics, what matters most to Democrats is that Tom Wolf be in place to veto Republican bills, especially those that pertain to reducing voting rights, limiting health care, and gerrymandering districts after the 2020 census. That's why if this is a Democratic "wave" election, Wolf will win a second term.

BATTLE FOR U.S. SENATE RUNS THROUGH PENNSYLVANIA

Overview:

Democrats would love to control the U.S. Senate. After all, that's the body that has given President Trump a record number of judges and other appointments that many have criticized, including the 50-48 confirmation of Brett Kavanaugh to the U.S. Supreme Court, which almost certainly means a "scaling back" in some way of abortion rights in the years to come.

The Republicans only hold the Senate 51 to 49 (counting the two Independents, Bernie Sanders & Angus King as Democrats with whom they caucus), so it would seem very do-able at first blush.

But Democrats are defending 26 of the 35 Senate seats on the ballot, and 10 of those are in states that Trump won in 2016. Five of these Democratic incumbents are running in states that the president won in a landslide: Claire McCaskill (Missouri +18); Joe Donnelly (Indiana +19); Jon Tester (Montana +20); Heidi Heitkamp (North Dakota +35); and Joe Manchin (West Virginia +41).

Besides these five presumed "vulnerable" Democrats, there is at least one other Democratic incumbent in the "toss up" category. U.S. Sen. Bill Nelson of Florida is facing a strong challenge from Republican Gov. Rick Scott in another state won by Trump.

To win control of the U.S. Senate, it's not enough that Democratic incumbents win reelection everywhere in the country. They must also defeat Republicans or win open seats in at least two other states, three if Heitkamp loses in North Dakota, as many predict. [Don't forget. Vice President Pence breaks the tie in a 50-50 body].

Right now, Democrats have three (maybe four) states that (maybe) could elect a Democratic senator: Arizona where U.S. Rep. Krysten Sinema (D) will face off against U.S. Rep. Martha Sally (R); Nevada where U.S. Rep. Jacky Rosen (D) is trying to upend U.S. Sen. Dean Heller (R); Tennessee where former Gov. Phil Bredesen (D) has a shot at beating U.S. Rep. Marsha Blackburn(R); and Texas where U.S. Rep. Beto O'Rourke (D) is running uphill but stronger-than-expected against U.S. Sen. Ted Cruz (R).

With just two weeks to go, some polls show Democrats behind in all four of these states, although at this stage I caution that what really counts is the Get-Out-The-Vote effort of each campaign. For example, if every Hispanic American in Texas turned out to vote for O'Rourke over Cruz to protest President Trump's immigration policy, O'Rourke would win. That seems unlikely, but theories like this will make Election Night interesting for many of us political addicts.

The number crunchers at FiveThirtyEight say the Democrats have a 19.8 percent chance of taking control of the Senate. A long-shot, yes, but do-able if there really is a turn-out wave for Democrats.

Into this mix is the race for U.S. Senate in Pennsylvania where President Trump and state Republicans think they see a particularly vulnerable incumbent in Bob Casey.

Can a Casey be Defeated in Pennsylvania?

"He's not like his father," says President Trump and many other GOP leaders in Pennsylvania.

By that they mean, of course, that U.S. Sen. Bob Casey is not the ideological conservative Democrat that his late father, Gov. Bob Casey, was, a man often at odds with the national Democratic establishment of his era.

But if Casey the Younger is in step with his party of the 21st century, why should that surprise anyone?

The more important question is, has Casey given voters any reason to deny him a third term in 2018? At this stage, most polls suggest not. The most recent poll has Casey up by 14 points. Considering he won in 2012 by just 8 points over an even lesser known GOP candidate (Tom Smith), many suspect this race is closer than the polling shows a few weeks out.

Still, the incumbent Democrat starts off with huge advantages. Name recognition, for one. A Bob Casey, often unrelated, has been on the state ballot since the 1966. Everybody knows Bob Casey.

Second, money. As of September 30, Casey had cash-on-hand of \$6.7 million, having raised \$20.9 million in the cycle, while his Republican challenger had \$1.3 million on hand with an overall take of \$6.2 million.

Third, message. Casey has been increasingly critical of the President with stronger words and louder rhetoric than the soft-spoken senator usually utters. There's nothing wishy-washy about his positions on issues these days, a clear sign that he thinks Pennsylvanians want someone who will stand up to the President.

Enter U.S. Rep. Lou Barletta of Hazleton PA in Luzerne County, not far from where Casey grew up in northeastern PA.

Barletta is President Trump's favorite candidate in Pennsylvania, urging him to run for Senate from the get-go. No surprise there. Barletta was an early supporter of Candidate Trump in 2016, and co-chaired the president's ultimately successful campaign in this state.

Most people don't know Barletta, as he doesn't come from the mega-media markets of Philadelphia and Pittsburgh. Still, he was a small town mayor who made big waves with his opposition to illegal immigration in Hazleton. It's obviously one of several issues that unites him with Trump.

In fact, when I asked Barletta where he disagreed with the president, he could only offer one -- he supported the Eagles in the Super Bowl, while Trump backed the Patriots. By the way, in a sign of how tight Trump and Barletta are, Barletta was one of the few invited to Mar-a-Lago to watch the Super Bowl with the president.

So if you're looking for a referendum on Donald Trump, the Casey-Barletta race is clearly one.

Trump is taking significant personal interest in this race, already campaigning for Barletta in Erie and earlier in Wilkes-Barre where he called the soft-spoken Casey "Sleeping Bob." A month or so later, that evolved into a rather well-made TV ad showing a Casey look-alike sleeping.

Of course, when it comes to most things Trump, Casey has found his voice, which is usually strong and sometimes strident. There is little doubt that Barletta is right that Casey has taken a turn to the left over the last few years. The question is, in the era of Donald Trump, do Pennsylvanians care?

If Casey loses to Barletta -- still thought by most to be unlikely -- there is no hope at all of the Democrats winning control of the U.S. Senate.

PENNSYLVANIA KEY TO CONTROL OF U.S. HOUSE

Overview:

With 435 members in the U.S. House of Representatives -- and 18 elected here in this Commonwealth -- Pennsylvania will play a larger role than ever in determining whether Democrats can retake control of that body.

Democrats must pick up a net of 23 seats to win control of the U.S. House, and 4 of those pick-up seats (17% of the gain needed) must come from Pennsylvania.

As I will outline below, many of these 18 seats are now in play, primarily because the state Supreme Court ruled "unconstitutional" the political gerrymandering of state Republicans in 2011. Those old district lines essentially guaranteed Republicans 13 of the state's 18 seats even though Democrats outnumber Republicans in the state by 4.0 million to 3.2 million (with 1.2 million in other parties or independents).

In my view, Democrats need to split the PA seats, 9 to 9, to take control of the U.S. House. Some of the new districts are more competitive, allowing both parties the chance to pick up seats. And both parties have nominated credible candidates.

The national historic trend cannot be ignored. Traditionally, the party in the White House tends to lose seats in the U.S. House during the president's first term. Since the Civil War, that party has lost seats in the midterm 36 out of 39 elections, losing an average of 33 seats. In modern times (since World War II), the average number of seats lost is 26.

Of course, there are exceptions: 1998 and 2002 stand out. When House Republicans sought to impeach Bill Clinton in 1998, the country reacted by electing more Democrats. Similarly, George Bush's performance after 9/11 allowed his Republican Party to pick up seats in 2002.

But unlike those years, most pundits think the Democrats have a better than 50-50 chance to win the House, especially if President Trump's overall popularity remains static. Real Clear Politics has the president's favorable average at 43.2, nearly 10 points below his unfavorable average at 53.0. If Trump's approval rating stays in the low 40's, it's hard to imagine Republicans picking up seats. But, remember, the GOP goal is to keep the losses to under 23, allowing them slender control, but control nonetheless, of the House.

Pennsylvania's "Safest" Districts:

No matter how "compact, contiguous, and fair" you draw congressional district lines, some districts are inherently one-party simply because they are mostly urban or rural. That is true in Pennsylvania, too, where political battles in these districts will be within the party primary, not the general election.

Of the 18 districts in this state, at least eight can be classified as "safe" for the majority party. These include the 2nd & 3rd Districts in Philadelphia, represented by Democratic U.S. Reps. Brendan Boyle & Dwight Evans, the new 4th District in Philadelphia & Montgomery County now represented by retiring U.S. Rep. Bob Brady, but likely to be retained by PA Rep. Madeleine Dean, the Democratic nominee; the 11th District in York & Lancaster Counties represented by Republican U.S. Rep. Lloyd Smucker; the 12th District that includes all or part of 15 counties in north-central PA represented by Republican U.S. Rep. Tom Marino; the 13th District in southwest-central PA now represented by retiring Republican U.S. Rep. Bill Shuster and likely to be retained by Dr. John Joyce, the Republican nominee; the 15th District in northwest-central PA represented by Republican U.S. Rep. G.T. Glenn Thompson; and the Pittsburgh-based 18th District represented by Democratic U.S. Rep. Mike Doyle.

In addition to these eight reasonably safe districts, I know some political cognoscenti would toss in a couple of other districts listed below. But I am using an expansive definition of "competitive" just in case that "blue wave" becomes a tsunami.

Let's take a brief look at each of the other ten districts, which I have broken down into two categories: "competitive" and "possibly competitive."

Pennsylvania's "Competitive" Congressional Districts

1st Congressional -- Fitzpatrick (R inc.) v. Wallace (D)

U.S. Rep. Brian Fitzpatrick is hoping his mostly Bucks County constituents see him as a very moderate Republican. He did vote against the GOP bill to repeal Obamacare and is endorsed by Gabby Giffords' gun control group, but his Democratic opponent, philanthropist Scott Wallace (grandson of FDR's vice president Henry Wallace) wants voters to think "Trump-enabler" when you think Fitzpatrick. Wallace has had problems of his own. His philanthropic fund donated to groups that support the BDS boycott of Israel for its treatment of Palestinians, although Wallace calls himself pro-Israel and blames other fund directors for those donations. With roughly 215,000 Democrats & 204,000 Republicans & 82,000 Independents, just about everyone thinks this district is a toss-up and up for grabs.

5th Congressional -- Open -- Scanlon (D) v. Kim (R)

Accused of sexual harassment, Republican U.S. Rep. Pat Meehan chose to resign, leaving this seat a likely pick-up for the Democrats. The newly redrawn district in Delaware County favors the Dems, roughly 255,000

to 176,000, where Hillary Clinton won by 28 points. Attorney Mary Gay Scanlon is the Democratic nominee against former prosecutor Pearl Kim, a Republican. Scanlon's career has focused on children and education, but she has embraced Democratic progressive positions on most issues from immigration to healthcare. Republican Kim, whose parents immigrated from Korea, has an equally impressive resume, working in both the PA Attorney General's office and local District Attorney's office with a special focus on human trafficking. Most pundits see this district "likely" Democratic. By the way, the same day voters elect a new representative for the 117th Congress starting in January, they will elect one to serve out the term of Meehan, giving the winner a leg up on seniority.

6th Congressional -- Open -- Houlahan (D) v. McCauley (R)

This district has often been a battleground between the parties with Republicans like U.S. Rep. Ryan Costello eking out victories. But the new district lines in Chester and part of Berks County makes this a slightly more favorable district for the Democrats, with Hillary Clinton winning by 10 points instead of just 1 point. Costello decided to retire at the last minute, leaving the GOP nomination in the hands of Greg McCauley, a tax attorney and former Wendy's franchise owner. McCauley had filed to challenge Costello for not being pro-Trump enough. The Democrats already had their candidate in Chrissy Houlahan, an Air Force veteran and businesswoman who has simply out-fundraised McCauley. Latest reports show her with \$2.6 million cash on hand and McCauley with \$129,000. Most expect this district to be a relatively easy pick-up for the Democrats.

7th Congressional -- Open -- Wild (D) v. Nothstein (R)

This district in the Lehigh Valley (Allentown/Bethlehem) has been another one of those battleground districts with moderate Republicans like former U.S. Rep. Charlie Dent, a frequent Trump critic, usually beating the Democrats. But Court-mandated redistricting has made the 7th a bit more Democratic, turning the district from a +8 Trump district to a +1 Clinton district. Dent resigned his seat, and Republicans nominated Lehigh County Commission chair Marty Nothstein, while Democrats opted for former Allentown solicitor Susan Wild. Democrats do outnumber Republicans by 60,000, but Independents represent about 83,000 of the registered voters. Nothstein, a gold medal Olympics cyclist and an elected official, may have started with better name ID, but Wild has out-fundraised Nothstein two-to-one. Most analysts say this district leans Democratic.

17th Congressional District -- Rothfus (R inc.) v. Lamb (D inc.)

This is probably the most watched race in Pennsylvania this year, where two well-funded incumbents are battling in the suburbs of Pittsburgh: Republican U.S. Rep. Keith Rothfus v. Democratic U.S. Rep. Conor Lamb. It is the only race in the nation where two incumbents are running against each other. The district includes major suburbs in Allegheny County and a small part of Butler County and all of Beaver County, a district that voted for Trump over Clinton by just 2 points. In terms of registration it's about 256,000 Democrats, 187,000 Republicans, and 70,000 Independents. In a "wave" year, Lamb should win this seat, and one poll has him up by 12 over Rothfus. That may be one reason that the NRCC (National Republican Campaign Committee) pulled its TV money from Pittsburgh. But Rothfus seems to be on TV as much as Lamb, so maybe he has enough money to win. As October began, he had \$400,000 cash-on-hand to Lamb's \$880,000. Bottom line. If suburban women stick with Lamb (as they did over PA Rep. Rick Saccone in Lamb's special election in March), Lamb ought to win this seat, which is why most pundits now think this district leans Democratic.

Pennsylvania's "Possibly Competitive" Congressional Districts

8th Congressional -- Cartwright (D inc.) v. Chrin (R)

Based in Luzerne (Wilkes-Barre) and Lackawanna (Scranton) counties, Republicans think U.S. Matt Cartwright is vulnerable, even though the Democrat won in 2016 despite a Trump win of 10 points that year. The new district isn't a whole lot different, but Republicans have a very wealthy former banker from JP Morgan Chase and Merrill Lynch named John Chrin, who can self-fund a competitive race. It's a classic white working class district that liked Trump in 2016 while voting for Cartwright at the same time. The district has at least 75,000 more Democrats than Republicans, but in 2018, Trump voters are being asked to vote for Chrin, not

Cartwright. If they do, that augurs well for Trump in the state in 2020, but so far this district seems likely to reelect Cartwright the Democrat.

9th Congressional -- Open -- Wolff (D) v. Meusser (R)

This district, now represented by U.S. Rep. Lou Barletta who gave up his seat to be the Republican nominee for U.S. Senate is probably a relatively safe seat for the Republicans in 2018. After all, the district in 8 counties including Berks, Lebanon, and Schuylkill Counties, is overwhelmingly GOP, roughly 298,000 to 162,000. What makes it somewhat interesting is that the Democrats have nominated a conservative "Blue Dog" Democratic dairy farmer in Denny Wolff. Wolff, a former state secretary of agriculture under Gov. Rendell, is facing Dan Meusser, a wealthy businessman and former state secretary of revenue under Gov. Corbett. Meusser is a strong Trump supporter, which should play well in the 9th district. It's hard to imagine a Democratic upset in this district. If there is, you know the "blue wave" is beyond the current dreams of the most partisan Democrats.

10th Congressional District -- Perry (R inc.) v. Scott (D)

The 10th district in south-central PA includes Dauphin County (Harrisburg), York, and Cumberland Counties and should be reasonably safe territory for the reelection of U.S. Rep. Scott Perry, a strong conservative and Iraq War veteran. Perry, a member of the House's Freedom Caucus, is being challenged by George Scott, himself a 20-year Army veteran and now a Lutheran minister. The district favors Republicans with around 219,000 Republicans, 197,000 Democrats, and 77,000 Independents. Perry, who was quasi-punked by Sasha Baron Cohen [he accepted a fake pro-Israel award but smartly turned down an 'interview' with Cohen], should prevail, but the redistricting has moved the 10th from a +22 Trump district to a +9 district now. And Democrat Scott has surprised many with his fund-raising. At the end of September, he had cash-on-hand of \$520,000 to Perry's \$540,000. That gives Democrats hope that in a "wave" year, they can knock off Perry. Maybe, but despite the strong challenge from Scott, many pundits still think Perry will pull this out.

14th Congressional District -- Open -- Boerio (D) v. Reschenthaler (R)

Most analysts put this southwestern PA district in the "likely GOP" category, and they are probably right to do so. But the open seat (once represented by former Republican U.S. Rep. Tim Murphy and essentially the district Lamb won by 3/10ths of 1 percent over PA Rep. Rick Saccone) gives Democrats the dream of a pick-up with their businesswoman candidate Bibiana Boerio (rhymes with Oreo). The numbers can be misleading. This 4-county district has roughly 221,000 Democrats to 185,000 Republicans with 52,000 Independents, but this is strong Trump country (+29). In a hard-fought primary, Republicans chose PA Sen. Guy Reschenthaler, a young protege of Murphy, over Saccone, who narrowly lost the special congressional race to Lamb. When Lamb's hometown was put into the new 17th District, he chose to run there, leaving the 14th District wide open. Democrat Boerio, who comes from vote-rich Westmoreland County, was a former Ford Motor Co. executive who later served a stint as chief of staff to former U.S. Rep. Joe Sestak. Republican Reschenthaler did not live in the district until a month or so ago, but he just moved to Washington County from Allegheny County, and portrays himself as a moderate-to-conservative veteran with a stint as a Navy lawyer. This race has been under the radar, in part because the Democrats failed to put any money into it. On her own, Boerio raised some money, going into the last weeks with \$234,000 cash-on-hand to Reschenthaler's \$253,000. Still, most think Reschenthaler will prevail, returning this seat to the GOP after Lamb, although if this is really the "year of the woman," who knows.

16th Congressional District -- Kelly (R inc.) v. DiNicola (D)

Democrats think that redistricting gives them a shot at beating Republican U.S. Rep. Mike Kelly, who hails from Butler County, the southern-most part of the 16th District. The Democrat is attorney Ron DiNicola, an Erie attorney in the northern-most part of the district with 190,000 voters, while Kelly's home county has just 90,000 voters. But the 5-county northwestern PA district still votes Republican even though the registration is practically even between the two major parties, and every county, including Erie, voted for Trump in 2016 by 20 points. Kelly has been closely allied with the president, which makes this district a good test for how far the "wave" extends in 2018, and another reason the president came to Erie recently. But seeing a possible pick-

up, the Democratic Congressional Campaign Committee (DCCC) has spent money here. Kelly is the odds-on favorite to win, but DiNicola, who raised and spent money and is getting outside Democratic support as well, is well-positioned to ride the wave if the blue waters sweep south from Lake Erie.

Summary

When the dust settles after all the ballots are counted in Pennsylvania for the U.S. House of Representatives, instead of the current 12 Republicans & 6 Democrats, Democrats hope to see at least 9 Democrats in their 2019-20 delegation: Boyle, Evans, Dean, Scanlon, Houlahan, Wild, Cartwright, Lamb, and Doyle. Anything less than that is probably a decent night for state Republicans.

But if Democrats pull off wins in any of the other PA congressional districts with Wallace, Scott, DiNicola, Wolff, or Boerio, you know it's a very strong Democratic night across the country. In short, Pennsylvania voters will have a lot to say about the make-up of the Congress next year. Stay tuned.

If you made it to the end of this epistle, five gold stars! I hope you found some of this helpful and informative, especially as you plan to watch the November 6 returns come in. I won't remind you to vote because you wouldn't be on this mailing list if I thought you didn't care about this nation's and the state's future. As always, I welcome your feedback!

Yours,
Jon

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[As always, these views are my own and not those of the wonderful organizations with whom I am associated].