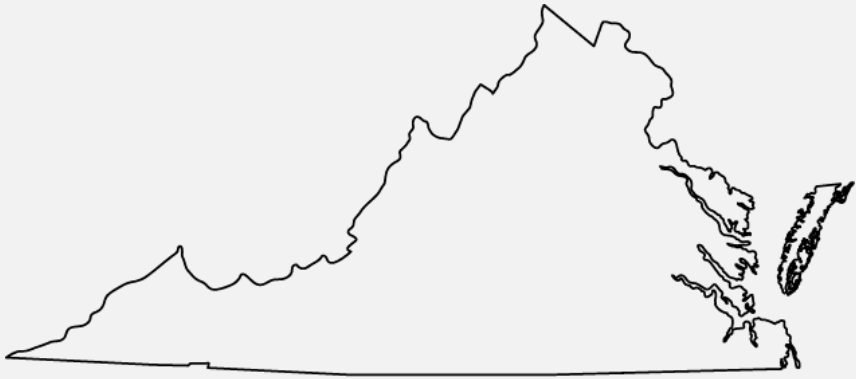


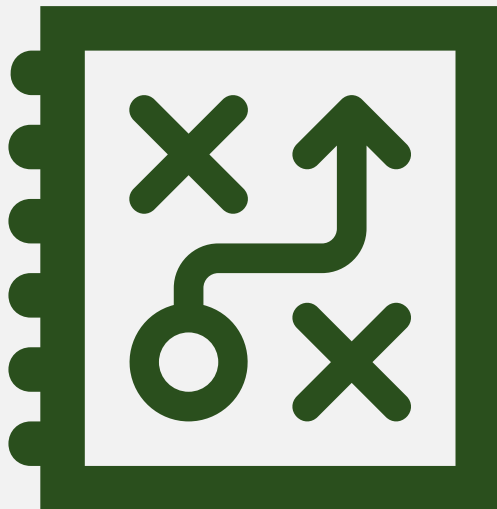
Virginia State of Play

December 2019



Virginia State of Play

Virginia State of Play is a quarterly look at the Commonwealth's big picture. Inspired by Bruce Mehlman's quarterly slide decks, State of Play will attempt to look at major moments, big trends, and what's on the horizon in Virginia. State of Play does not necessarily represent the opinions of Gentry Locke or its partners. For questions or comments, contact Matt Moran.



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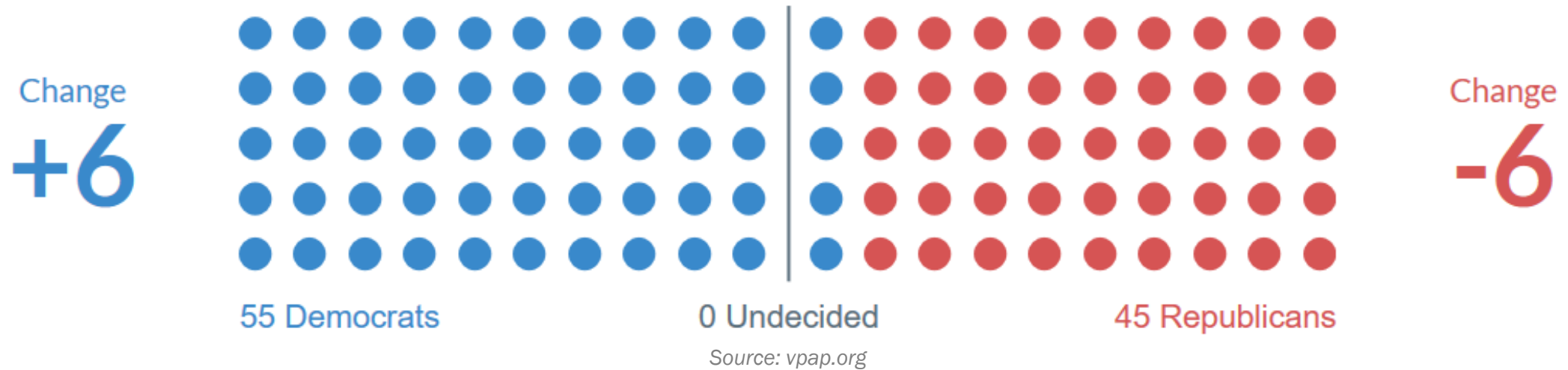


**The 2019 Elections have
fundamentally changed the
makeup of Virginia government.**

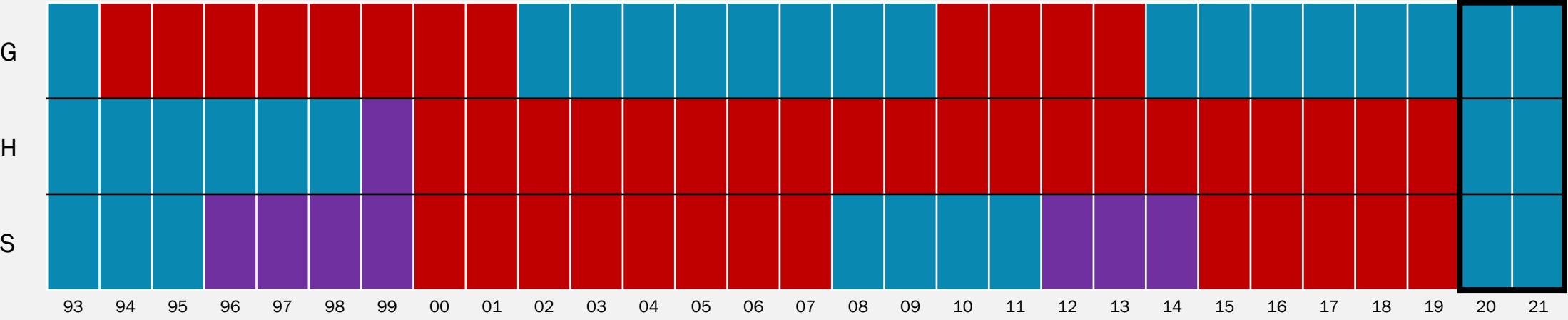
Democrats flipped two seats to take a 21-to-19 majority in the Senate.



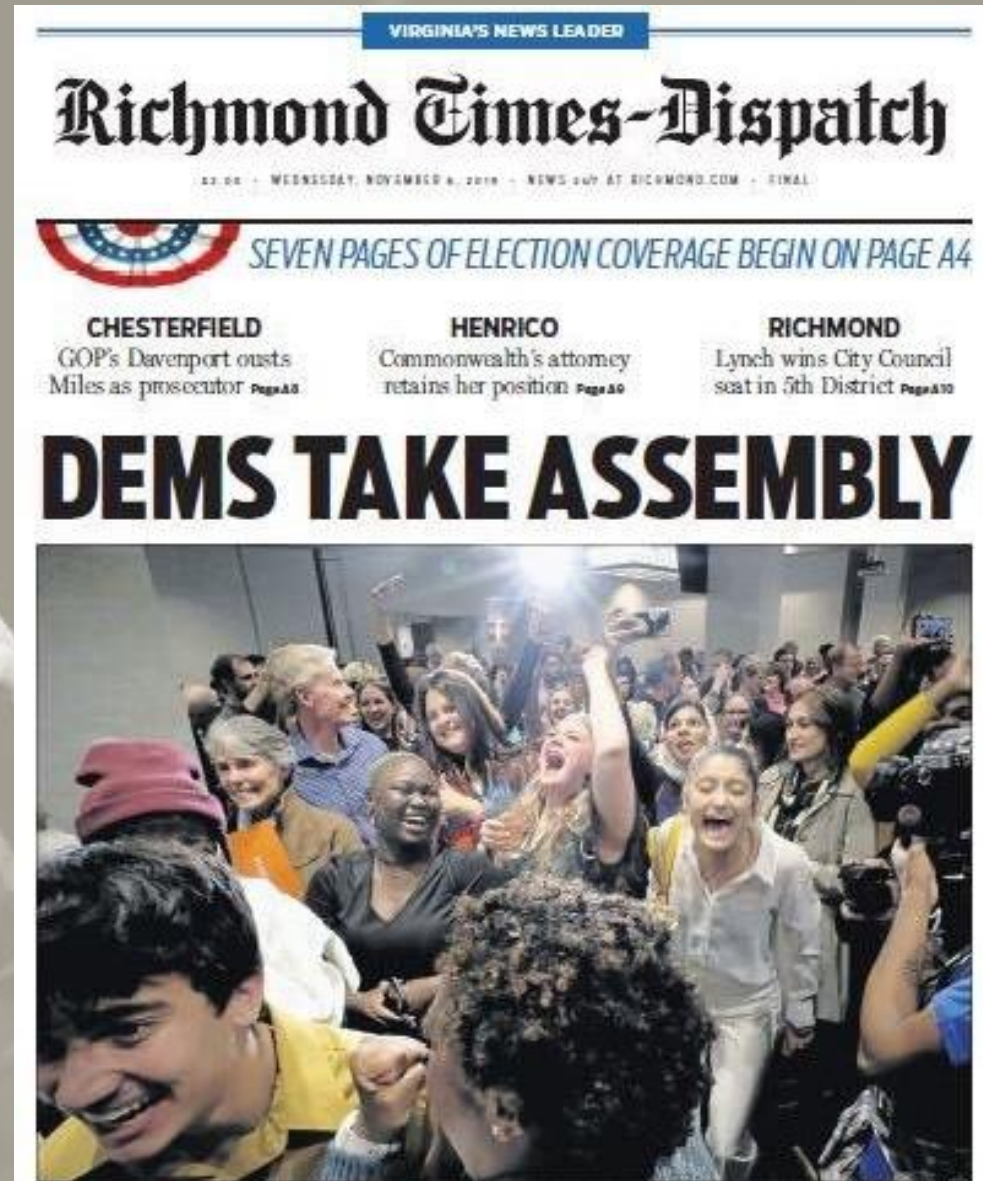
Democrats flipped six seats to take a commanding majority in the House of Delegates.



For the first time since 1993, Democrats will control the House, Senate, and Governor's mansion simultaneously.



A number of political factors played a role in the Democratic takeover, including redistricting, the Democratic financial advantage, and the national environment.



The federal redistricting case played a major role in altering the landscape of House races.

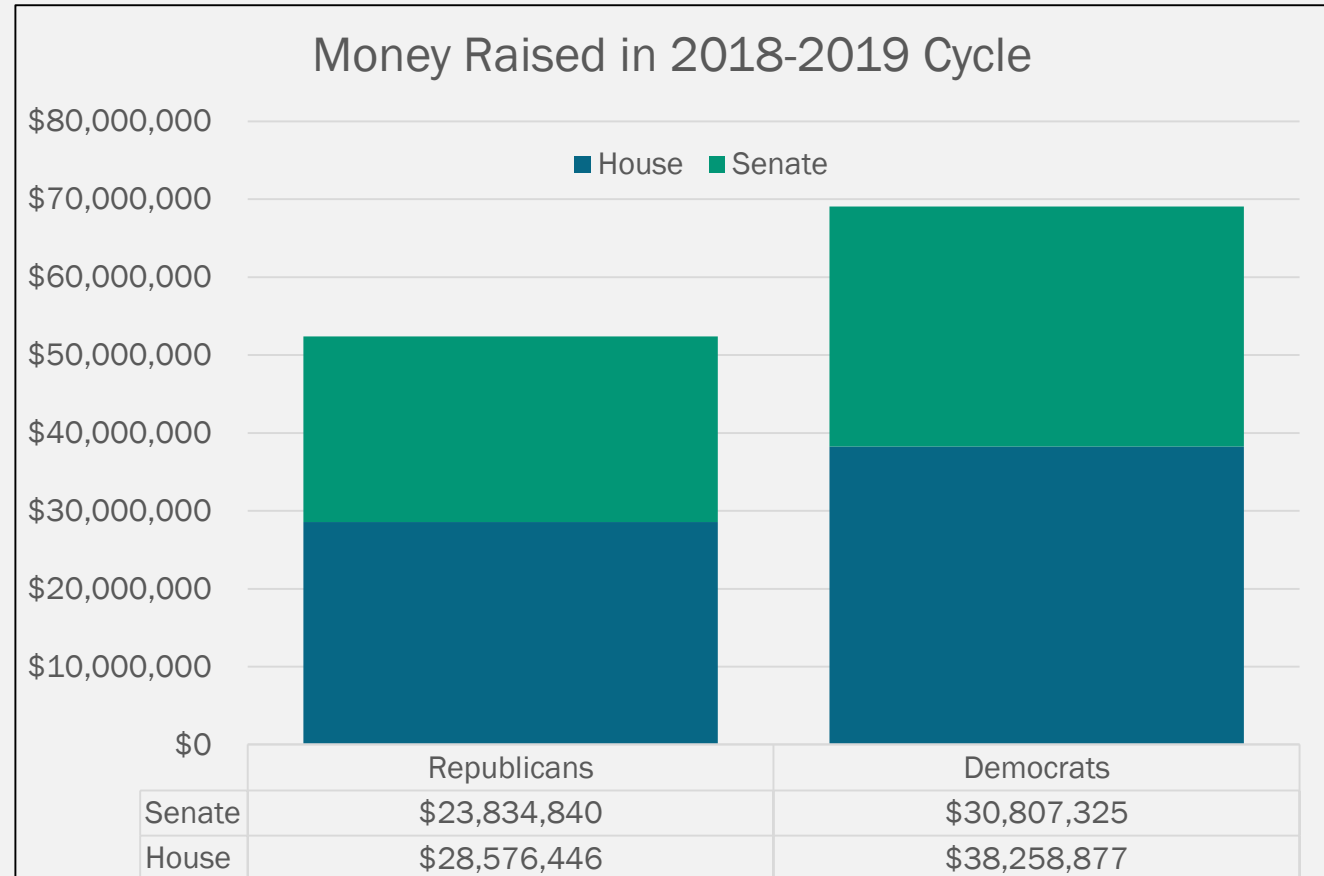
	Before Redistricting	After Redistricting
House seats won by Hillary Clinton	51	56
House seats won by Donald Trump	49	44

At least four Democratic flips in the House can be traced directly to redistricting changes.

District & Candidates	Trump % Pre-Redistricting	Trump % Post-Redistricting	Difference
76 – Jones (R) v. Jenkins (D)	52.9%	39.6%	-13.3%
83 – Stolle (R) v. Guy (D)	50.8%	44.7%	-6.1%
91 – Holcomb (R) v. Mugler (D)	53.7%	44.7%	-9.0%
94 – Yancey (R) v. Simmonds (D)	44.3%	39.0%	-5.3%

The first \$100 million legislative election.

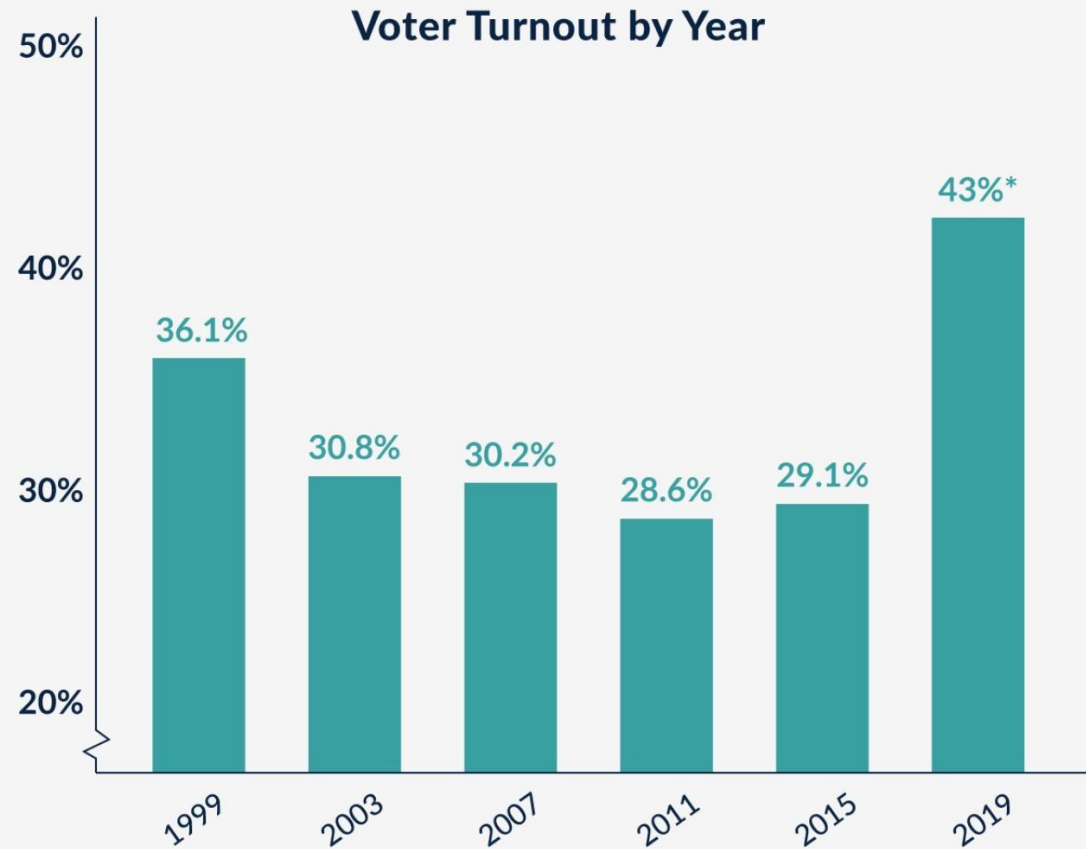
Both parties raised a combined \$121 million for the 2018-2019 cycle, making this Virginia's first \$100 million legislative election.



Source: vpap.org

Spending,
among other
factors, drove
record turnout
for an off-off-
year election.

Four in 10 Virginia voters cast ballots this November, a record turnout in General Assembly elections since the Commonwealth expanded the voter registration process.

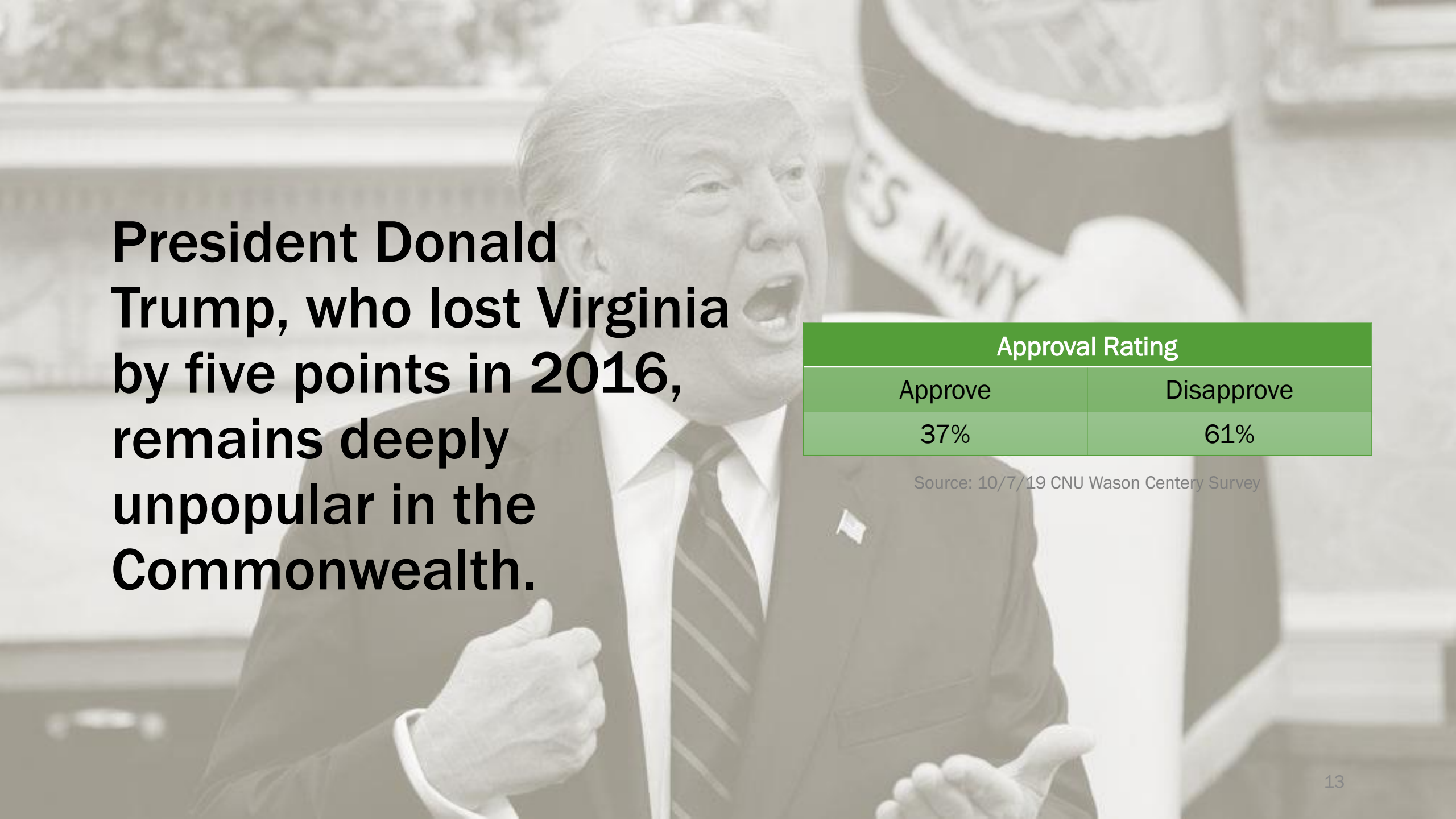


Source: vpap.org

A photograph of Donald Trump waving his right hand. He is wearing a dark suit, a white shirt, and a red tie. The background is a blurred outdoor setting. The image has a dark red overlay on the left side where the text is located.

**The Virginia General
Assembly now
follows national
partisan trends and
alignments.**

As goes Trump, so goes the district...



President Donald Trump, who lost Virginia by five points in 2016, remains deeply unpopular in the Commonwealth.

Approval Rating	
Approve	Disapprove
37%	61%

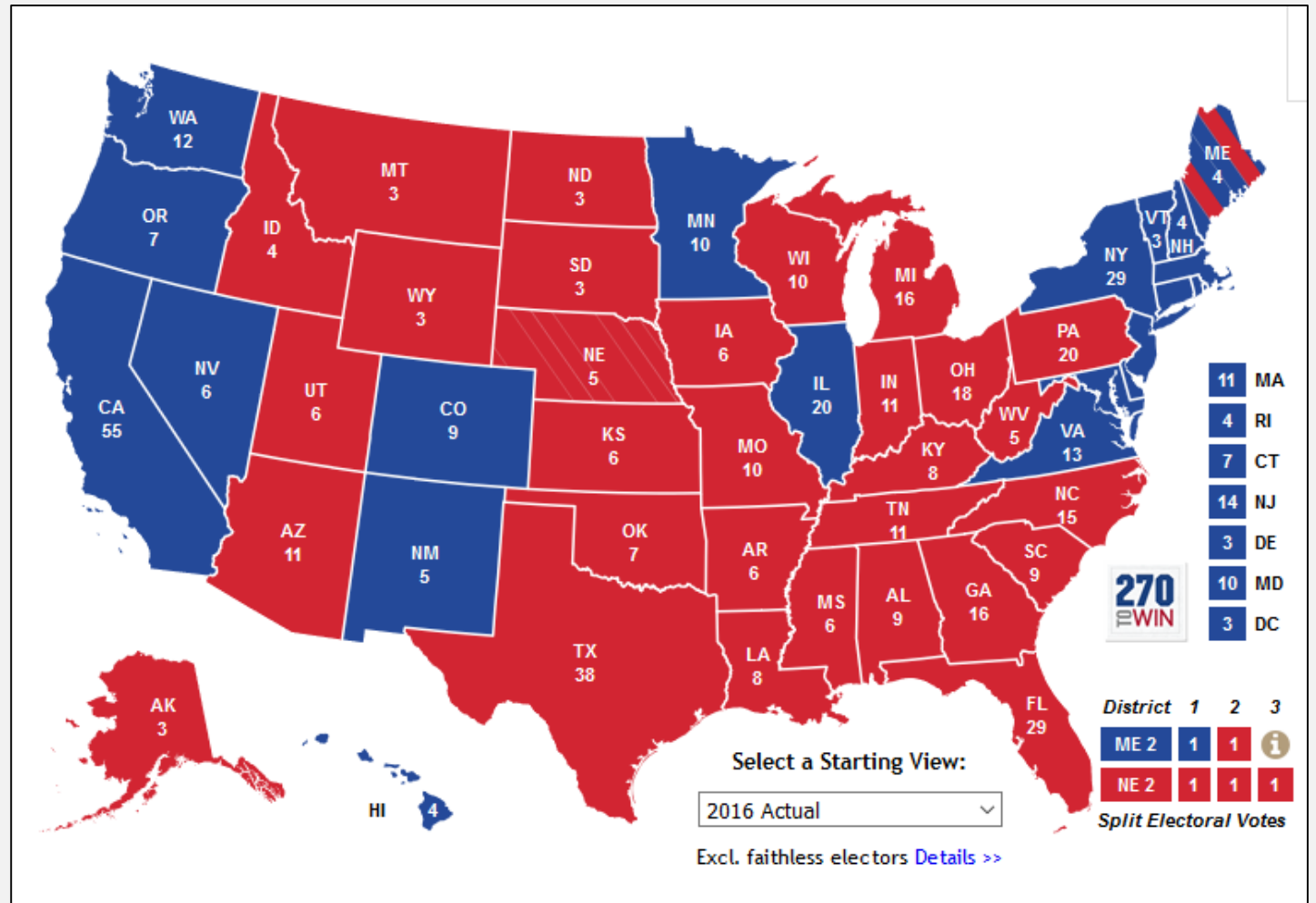
Source: 10/7/19 CNU Wason Centery Survey

As goes Trump, so go the districts... (Almost)

The four purple highlights are crossover districts that voted for one party in the 2016 presidential election and a different party in the 2019 legislative election.

District	2016 Result	2019 Result
SD7 (Kiggans)	Red	Red
SD10 (Sturtevant)	Blue	Blue
SD12 (Dunnavant)	Blue	Red
SD13 (Black)	Blue	Blue
HD10 (Gooditis)	Blue	Blue
HD21 (Fowler)	Blue	Blue
HD27 (Robinson)	Red	Red
HD28 (Cole)	Red	Blue
HD31 (Guzman)	Blue	Blue
HD40 (Hugo)	Blue	Blue
HD50 (Carter)	Blue	Blue
HD66 (Cox)	Blue	Red
HD72 (VanValkenburg)	Blue	Blue
HD73 (Kastelberg)	Blue	Blue
HD76 (Jones)	Blue	Blue
HD81 (Knight)	Red	Red
HD83 (Stolle)	Blue	Blue
HD84 (Davis)	Red	Red
HD85 (Askew)	Blue	Blue
HD91 (Mugler)	Blue	Blue
HD94 (Simmonds)	Blue	Blue
HD100 (Bloxom)	Blue	Red

Control of every state legislature in the country matches the results of the 2016 presidential election, with one exception: the Minnesota Senate, which has not stood for re-election since Trump was elected.



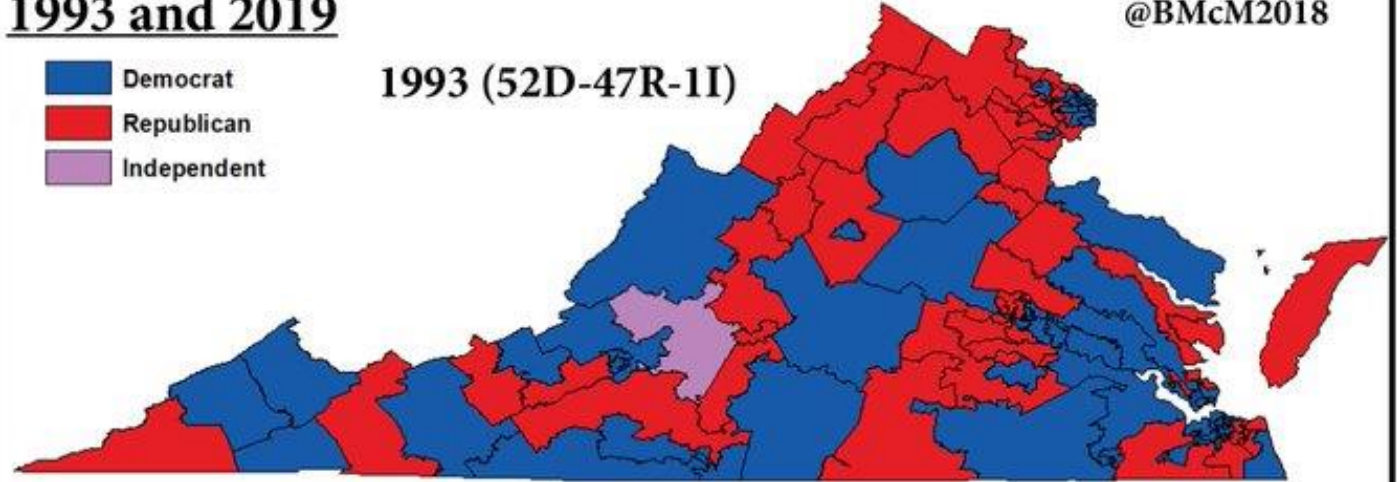
Virginia is politically divided along urban/suburban/rural lines, just like the national electorate.

Democratic Majorities in the Virginia House of Delegates 1993 and 2019

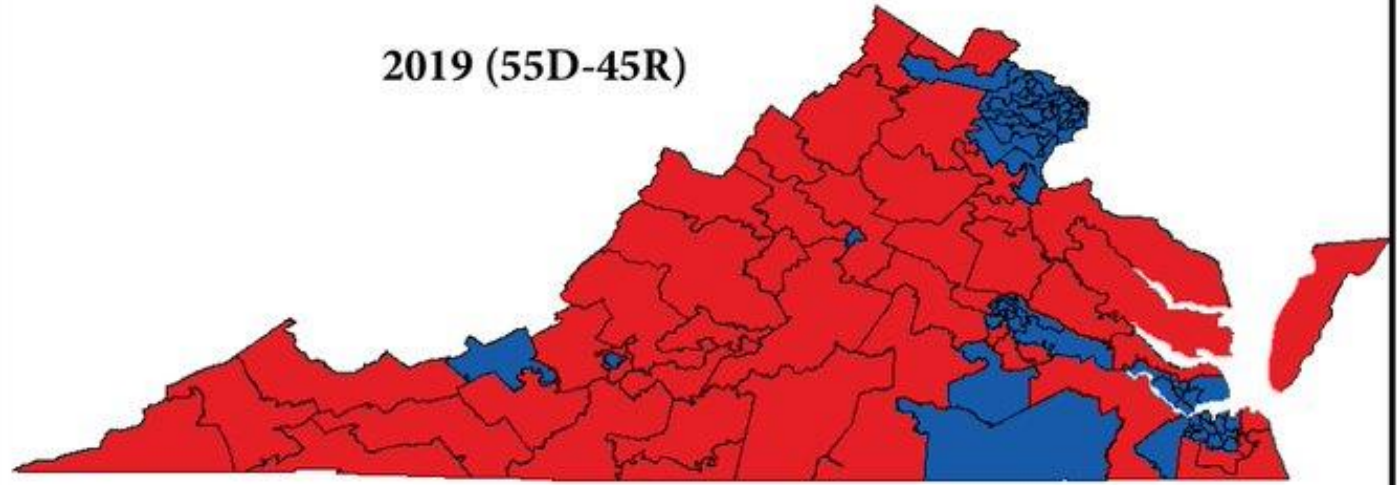
@BMcM2018

Democrat
Republican
Independent

1993 (52D-47R-1I)



2019 (55D-45R)



The rural/suburban/urban alignment is bad news for Republicans who now hold just nine truly “suburban” seats in the legislature.

House Republican “Suburban” Seats

- Kirk Cox
- Roxann Robinson
- Carrie Coyner
- Jason Miyares
- Glenn Davis
- Jay Leftwich

Senate Republican “Suburban” Seats

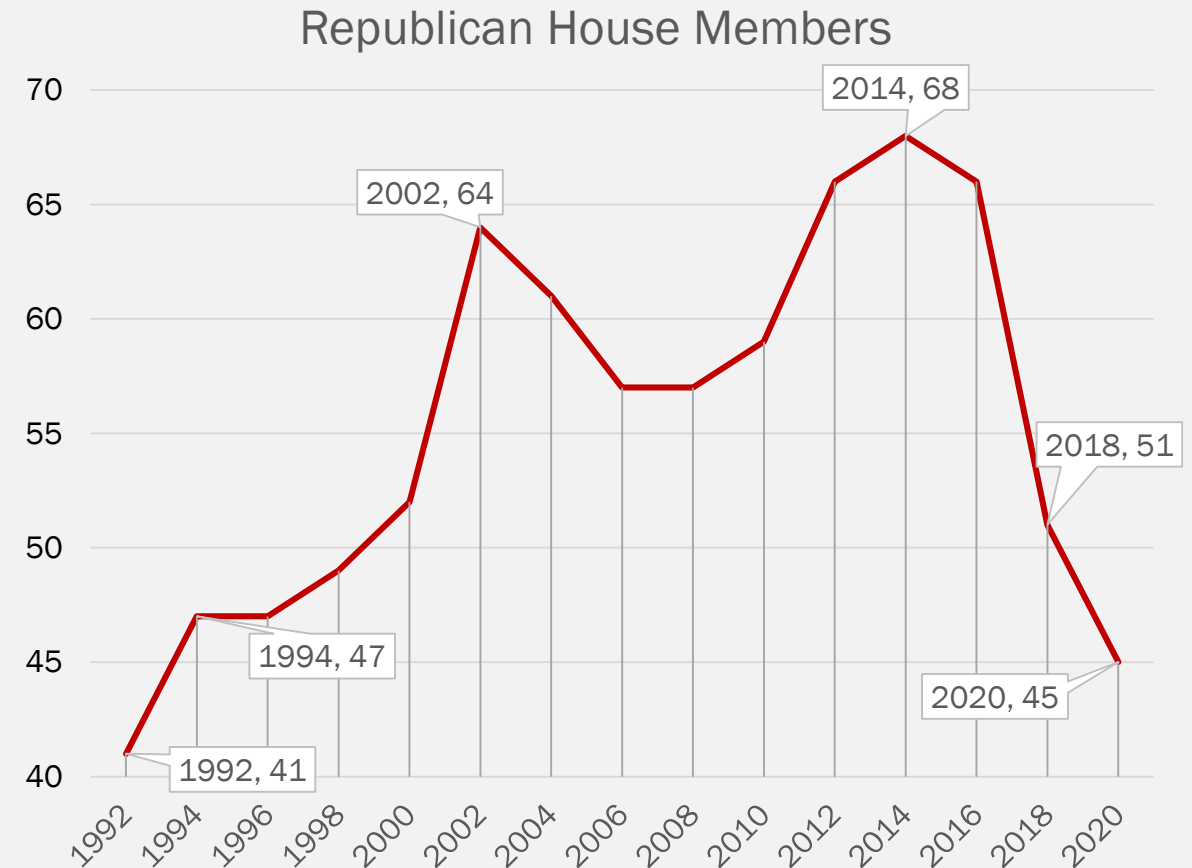
- Siobhan Dunnavant
- Bill DeSteph
- Jen Kiggans



These changing trends ended two decades of Republican dominance in the legislature.

Now, the GOP faces the challenge of being relegated to the minority party.

Minority Leader Todd Gilbert takes the reins of the **smallest House Republican caucus since 1992**, and now must manage without the carrots and sticks of committee assignments, bill referral, appointments, and a fundraising advantage.



Only three Republican House members have experience serving in the minority.

** When most recent tenure began; prior service was not factored in Seniority rankings*

Seniority	Party	Member	First Term
1	D	Ken Plum	1982*
2	R	Kirk Cox	1990
3	R	Bobby Orrock	1990
4	R	Terry Kilgore	1994
5	D	Vivian Watts	1996*
6	R	Kathy Byron	1998
7	R	Lee Ware	1998
8	R	Tommy Wright	2001
9	R	Mark Cole	2002
10	R	Rob Bell	2002



Bob Brown/Richmond Times-Dispatch

The lack of carrots or sticks is already evident in at least one case.

Look no further than Senator Amanda Chase's decision to leave the Senate Republican caucus.

The challenge for Republicans is how to stay unified in the wilderness.



Democrats now take center stage. How will Democrats capitalize on their new majorities? What challenges will they face?



The new Democratic government has no shortage of priorities.

- Equal Rights Amendment
- Gun Violence Prevention
- Anti-Discrimination Laws
- Minimum Wage
- Right to Work Repeal
- 100% Clean Energy Standard
- Reproductive Choice
- Criminal Justice Reform
- Decriminalization of Marijuana
- Voting Rights Reform
- Healthcare Access
- State Run Insurance Marketplace
- Affordable Housing
- Transit Priorities
- In-State Tuition for DACA Students
- Education Investments
- Eliminate Support-Staff Ratio
- Universal Pre-K
- Environmental Regulations

Some priorities will rise to the top due to broad consensus, others will cause friction

Expect Quick Action

- ERA
- Gun Violence Prevention
- Anti-Discrimination
- Criminal Justice Reform
- Energy & Climate Policy

Potential Trouble Spots

- Right to Work (Repeal?)
- Revenue Streams
- Dillion Rule
- Nonpartisan Redistricting

**Pre-filed bills
give an early
indication of
where they
will focus...**



Equal Rights Amendment Ratification

HJ1 (Carroll Foy)



No Excuse Absentee Voting

HB1 (Herring)/SB45 (Spruill)



Universal Background Checks

HB2 (Plum)/SB12 (Saslaw)



Nondiscrimination

HB3 (McQuinn)/HB21 (Lindsey)/SB23 (Ebbin)

“Establishment” leadership has a strong foothold, but will they have to battle with progressives eager for change?



Governor Northam, largely recovered from the yearbook scandal, has laid the groundwork for a big 2020 session, announcing key governing priorities before Election Day.

 **VIRGINIA MERCURY**
A new look at the Old Dominion.

CRIMINAL JUSTICE + POLICING HEALTH ENERGY + ENVIRONMENT GOVERNMENT + POLITICS EDUCATION GENERAL ASSEMBLY 2019

EDUCATION GOVERNMENT + POLITICS ELECTION 2019

Fully funding Virginia schools will cost \$1 billion more per year. Can Democrats deliver on that campaign promise?

By **Mechelle Hankerson** - October 25, 2019

Governor Ralph Northam Signs Executive Order to Expand Access to Renewable Energy, Support Clean Energy Jobs of the Future

Commonwealth sets goal to produce 100 percent of electricity from carbon-free sources by 2050




RICHMOND—Governor Ralph Northam has signed Executive Order Forty-Three, which establishes ambitious statewide goals and targets for clean energy deployment and expands upon the Commonwealth's commitments to reduce our environmental impact, mitigate the impacts of climate change, and boost the clean energy economy in Virginia. Governor Northam made the announcement today at the Virginia Clean Energy Summit in Richmond.

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Meaningful coverage

Ralph Northam column: Providing the best health care for Virginians

By **Ralph Northam** Oct 12, 2019

But what can Virginia afford?

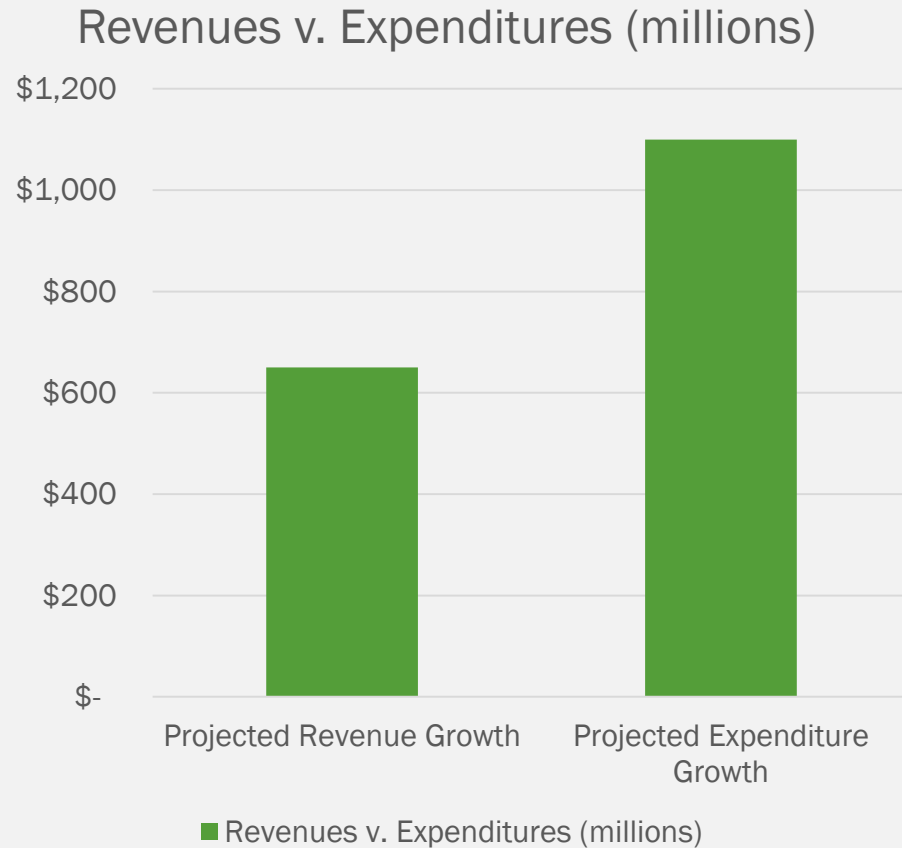
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'Robust growth' in Virginia's state revenues, but finance chief still wary



By MICHAEL MARTZ Richmond Times-Dispatch Oct 15, 2019

Finance Secretary Aubrey Layne says Virginia faces a “math issue”



SUBSCRIBER PLUS

'Math issue' drives new Northam administration push for budget savings

By MICHAEL MARTZ Richmond Times-Dispatch Oct 28, 2019

If those revenues grow by 3.5% to 4% a year, Virginia would receive an additional \$650 million to \$750 million a year, he said. But if education and health care spending continues to grow at 5% to 7% a year, that would cost the state between \$770 million and \$1.1 billion.

“It is a math issue,” Layne told the Appropriations Committee. “New policies are going to be tough to fund without new revenues or substituting something we’re already doing.”



With only a 60-day session, Democratic leadership will have to make tough choices on priorities. Or will they?

Given the newfound power, long to-do list, and time-constraints of a regular session, do not be surprised if the General Assembly convenes for a Special Session. Special Sessions have been called for one reason or another for seven of the last 10 years.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2020				???								
2019												
2018												
2017												
2016												
2015												
2014												
2013												
2012												
2011												
2010												

Regular Session

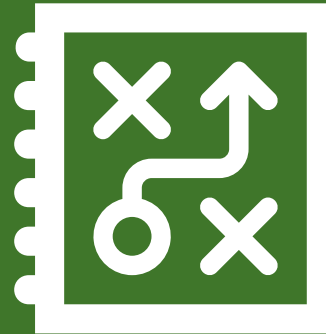
Budget Overtime

Special Session



**Bottom Line: The stars aligned for a Democratic takeover in 2019,
but now the real work of governing begins.**





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