

How We Win in 2026: Square One Election Memo

November 20, 2024

Toplines

- **Track Record of Flipping Seats from Red to Blue:** Since 2016, Square One has created the playbook to win tough Congressional races and expand the map for Democrats across the country. *We were built for this moment.*
- **Data-Driven Approach:** We use a data-backed approach to identify red districts and states that we can put — or keep — in play, with sustained investment. Supporting extraordinary candidates in sometimes unexpected places has helped us beat the odds in past cycles, and it will again in 2026 and 2028.
- **Recruit Early, Support Early:** We need to start recruiting and investing in winnable 2026 House districts today — including target districts in Pennsylvania, Michigan, and Wisconsin — and in many districts and states where Square One has proven impactful in the past.
- **Forward-Thinking Strategy:** We have a track record of making sound bets and helping produce big, surprising wins. We need to double down on this strategy — from running our biggest-ever recruitment program to scaling our signature candidate support model — in order to secure a House majority in 2026, and reclaim the Senate and White House in 2028.
- **We Invest in Candidates, Not Consultants:** As evidenced by the 2024 presidential election, too much money is spent on consultants who promote big ad buys, and get paid big sums win or lose. In clear contrast, we provide the hands-on support our candidates need to launch, run, and win their campaigns — from the ground up. And, as a donor-funded operation, we never charge them (except if required by FEC regulation) for our services.



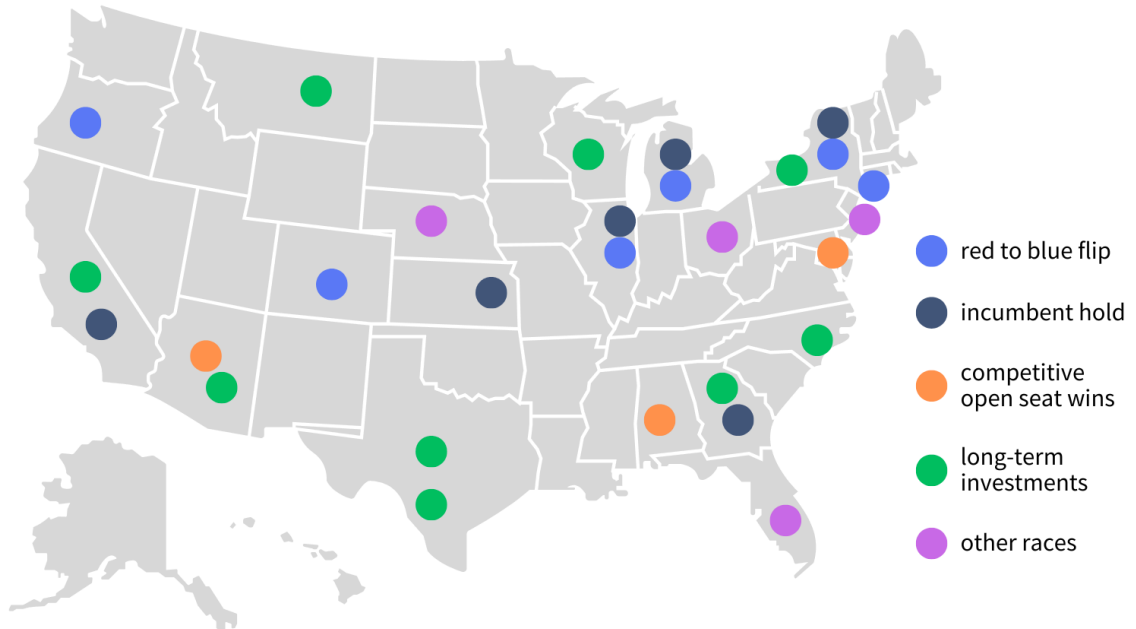
We sent inspiring leaders to the US House and Senate in 2024

Overview

In the wake of Trump’s 2016 election, Square One was launched to send a new generation of leaders to Congress. Since then, we have:

- Flipped or held 22 seats: 20 for the US House and 2 for the US Senate.
- Flipped US House seats in tough Congressional districts in Michigan, Illinois, Colorado, Oregon, and twice in New York.
- Won competitive open seats for the US Senate in Arizona and Maryland, and for the US House in Alabama.
- Held onto vulnerable seats for Democratic incumbents in California, Kansas, Illinois, Michigan, New York, and Georgia.
- Made long-term investments in Texas, Montana, Wisconsin, Arizona, Georgia, North Carolina, California, and New York.
- Put districts in play for Democrats that had been written off for decades.

SQUARE ONE’S NATIONAL IMPACT



Analysis

Square One candidates have over-performed in each of the past four election cycles:

2018

While the national House vote shifted 10 points towards Democrats from 2016, our inaugural class of 8 candidates saw an average shift of 14 points left.

2020

This cycle saw the national House vote shift back toward Republicans by about 6 points. Our candidates averaged no shift right in their districts and outperformed their Cook PVI scores by an average of about 4 points.

2022

Under newly redistricted maps, our candidates slightly outperformed their average Cook PVI scores while the national House vote again shifted to Republicans by about 6 points.

2024

And in what was an extremely hard year for Democrats, our 2024 candidates were some of the only red to blue flips — and they slightly outperformed their average Cook PVI again.

SENATE (2022, 2024)

Our candidates outperformed their states' Cook PVI scores by an average of .5 points — a small but meaningful amount when the battle for the Senate came down to a handful of seats in back-to-back cycles and 4 Senate races have been decided by less than 1 point since 2022.

INCUMBENT HOLDS

With a single exception, Square One has helped our incumbents hold their seats in every one of the past four election cycles.

2024 Results

It is not news that Democrats lost in 2024. But Square One helped hold off a red wave in the US House — where the GOP still has only the slimmest majority — and elect two new trailblazing US Senators.

HOUSE WINS

Square One invested in 3 of the 5 seats (as of this writing) that Democrats flipped from red to blue:

- **Laura Gillen (NY-04)** and **Janelle Bynum (OR-05)** both won their competitive seats against Republican incumbents.
- In the primary, Square One invested in **NY-22**, which flipped from red to blue in the general.
- The other House districts that flipped this year, both in NY and CA, did not have women, people of color, or LGBTQ+ candidates in the general election.
- And in an important open seat in Alabama, we helped **Shomari Figures (AL-02)** win.

SENATE WINS

- Square One endorsed **Ruben Gallego (Arizona)** early in his campaign, helping him secure the nomination and win by 2.2 points in a key battleground state that Trump carried by 5.5 points.
- Square One was one of the first national endorsements for **Angela Alsobrooks (Maryland)**, when she was still a longshot primary candidate. With our help, Angela won that race in a major upset, and held a critical Senate seat for Democrats in the general election.

Opportunities & Next Steps

BIG PICTURE

Since we launched, Square One has been bucking conventional wisdom *and* national trends.

While our vision remains long-term, our immediate goal is to win the House in 2026, then win the Senate, hold the House, and uplift the Democratic presidential ticket in key swing states in 2028.

2026 DISTRICT FOCUS

Our initial list of ten targeted districts for the 2026 midterms is centered on six seats in Michigan, Pennsylvania, and Wisconsin. The average Cook PVI across these six districts is R+3.



1. **MI-07:** This seat had been held by Democratic Rep. Elissa Slotkin since 2018. Republican Tom Barrett won this seat by about 4 points after losing to Slotkin in 2022 by about 6 points.

2. **MI-10:** Though he defeated Democrat Carl Malinga in a rematch by 6 points this year, Republican Rep. John James first won this seat in 2022 by just .5 points.



3. **PA-07:** Democratic Rep. Matt Cartwright won the redrawn version of this seat by about 2 points in 2022 before losing by about 2 points this year.

4. **PA-08:** Democratic Rep. Susan Wild won the redrawn version of this seat in 2022 by 2 points before losing by about 1 point this year.

5. **PA-10:** Controversial Republican Rep. Scott Perry was re-elected this year by less than 1 point, his closest race ever.



6. **WI-03:** The previous versions of this district were represented by Democratic Rep. Ron Kind for more than two decades. Current Republican Rep. Derrick Van Orden lost to Kind by about 3 points in 2020, before defeating Democrat Brad Pfaff by 4 points in 2022 and Democrat Rebecca Cooke by 3 points this year.

We are also looking at running candidates in the following districts in 2026:



7. **NJ-07:** This district has seen three competitive campaigns in a row — Democratic Rep. Tom Malinowski won re-election in 2020 over Republican Tom Kean Jr. by about 1 point before losing to Kean in 2022 by about 3 points. Kean defeated Democrat Sue Altman this year by 6 points.



8. **NY-17:** Rep. Mike Lawler is the only New York Republican who flipped a seat in 2022 to be re-elected this year. Lawler defeated Democrat Mondaire Jones by 6 points after initially winning the seat by less than 1 point.



9. **CO-08:** This seat was created after the 2020 Census and has an even Cook PVI, and has since featured some of the closest elections in the country — Democratic Rep. Yadira Caraveo won by less than a point in 2022 before losing to Republican Gabe Evans by less than a point this year.



10. **NE-02:** This Omaha-based district has been one of the most competitive in the country going back to 2012 — Republican Rep. Don Bacon first won in 2016 by about 1 point, 2018 by 2 points, 2020 by about 5 points, and he defeated Democrat Tony Vargas by 3 points in 2022 and 2 points this year.

We will continue to monitor, adjust, and add to this list as the midterm landscape comes into clearer focus. Our final list will include at least 20 races across the country.

HOW WE WIN

We helped Democrats win across the country in 2018, 2020, 2022, and 2024. We'll do it again in 2026 and 2028 by:

- Using rigorous data analysis to **predict competitive / winnable districts** that have been otherwise overlooked and under-invested in by Democrats, often for decades.
- Recruiting **extraordinary candidates** and endorsing many campaigns early in the cycle.
- Investing in candidates, not consultants — since we're not driven by commission or profit, we can offer our campaigns **unbiased advice** that breaks through the noise.
- Focusing our **campaign support** across several key areas:
 - *Fundraising* — national donor networks, fundraising strategy, direct contributions
 - *Staffing* — ensuring our campaigns have access to top-tier senior campaign talent
 - *Field* and *GOTV* — deep expertise in field strategies that persuade and turn out voters
 - *Data analysis* — from voter contact plans to budgeting decisions, we help our candidates and their teams use data to design innovative, winning campaigns

We'll roll out our first set of endorsements by Summer 2025.

Budget

2026 CYCLE BUDGET (2 YEARS)

\$3 million

Our goal is to raise \$3M between November 2024 and November 2026 in order to build on our previous wins, and reclaim the US House in two years, and lay a strong foundation for 2028 by:

- **Scaling our data** and district analysis program to expand the map.
- Running our **most expansive national recruitment program** ever.
- **Endorsing candidates early** to build thriving campaigns from the outset.
- **Staffing up** to support our largest class of candidates to date, with a focus on field, data and messaging staff.
- Scaling our signature **high-impact, hands-on candidate support** program, including fundraising, messaging, data, and field operations.
- Protecting our **vulnerable incumbents** in the House and Senate.
- Publishing **best-in-class educational materials** that breakthrough campaigns use to win.

Square One is 100% donor-funded.

About Square One: Square One seeks out the most promising Democratic women, people of color, and members of the LGBTQ+ community to run for Congress in long-overlooked red districts and states, and provides the high-impact, hands-on support they need to launch, run, and win their groundbreaking campaigns — against all the odds.

Website: www.squareonepolitics.org

Contact:

Peachy Myers, Director of Giving, peachy@squareonepolitics.org

Will Levitt, Co-founder, will@squareonepolitics.org

Miti Sathe, Co-founder, miti@squareonepolitics.org

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