Politics, Movements, and Policy: Recipes for Influence over U.S. Old-Age Policy in Its Formative Years

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What drives state policy and under which conditions do social movements and other hypothesized determinants of policy influence it? This paper seeks to answer these related questions, by way of appraising an institutional political model, a political mediation model, and models of the influence of public opinion over policy. The paper does so through fuzzy set qualitative comparative analyses (fsQCA) of the generosity of U.S. old-age policy, across U.S. states during the 1930s and 1940s, reanalyzing data from Amenta, Caren, and Olasky (2005). That article found support for the institutional political and political mediation models through less rigorous crisp-set qualitative comparative analyses and without addressing public opinion. In fuzzy set analyses of the generosity of the initial old-age benefit, the average old-age benefit, and of the endpoint old-age benefit, the results continue to support for generous benefits does not greatly contribute to explaining either outcome, though the results suggest it may have some influence under specific conditions.

[Paper prepared for presentation at "Voters, Protest and Policies: Bridging Public Opinion, Social Movement Outcomes and Policy Responsiveness Research," University of Leicester. Draft copy—not for quotation or citation.] What drives state policy and under which conditions do social movements and other hypothesized determinants of policy influence it? Scholars have long debated the determinants of social policy, and have advanced a series of political arguments, including ones focusing on the influence of political institutions, state actors and partisan regimes, as well as social movements and public opinion. Sometimes scholars claim that these determinants work in concert. This paper seeks to answer these related questions and engage these debates by appraising different models of influence by way of fuzzy set qualitative comparative analyses (fsQCA) of U.S. oldage policy outcomes during their formative years in the 1930s and 1940s. This was an important period in which social policy dramatically changed and which the U.S. polity differed greatly in determinants that might have led to these changes.

Specifically, this paper reanalyzes models, data, and analyses from Amenta, Caren, and Olasky (2005), which addressed the influence of the old-age pension movement on old-age policy in the United States in the 1930s and 1940s and tested various models of the determinants of public policy through crisp-set qualitative comparative analyses (csQCA). The main analysis of public policy focused on the generosity of state-level old-age assistances programs. Although there were federal matching incentives to participate, each of 48 states could decide its own level of benefits. This was a high-profile issue of significant fiscal importance featuring extensive political conflict. The article also examined why some senators voted for a radical amendment that provided for generous universal pension (and which failed to pass in 1939).

In the crisp set analyses, the article appraised an institutional political model of social policy and a political mediation model of movement influence over policy. These analyses included political institutional measures, including whether the political system was democratized, whether its political party system was patronage-oriented, and whether its domestic bureaucracies were well developed. It also included more short-term institutional political influences, such as whether Democrats held power for a significant amount of time, as well as movementrelevant measures, such as whether the old-age pension movement was highly mobilized and engaged in "assertive" collective action. The latter two are central to a prominent political mediation model of movement influence over state policy (Amenta et al. 2010). The results supported both institutional political and political mediation models. Two structural or political institutional conditions were necessary to both high pensions and voting for radical pensions, but, that said, there were both institutional political and political mediation routes to favorable policy outcomes. The institutional political route involved not public opinion, but electing center-left governments into office, which is a standard influence on policy in crossnational research, as well as high domestic state capacities. The political mediation route involved the same political institutional preconditions, but required both high mobilization and assertive political activity by the movement.

Aside from reappraising the two joint effects models of policy change, the paper also assesses the role of public opinion on public policy. In a strong view of its influence, public opinion, as measured through polls, is expected to have a determinant influence when the issue is salient (Burstein and Linton 2002; reviews

in Manza and Cook 2002; Amenta et al. 2001; Weakliem 2000), as the old-age pension issue was in the late 1930s and early 1940s. That is, favorable public opinion is expected to be both a necessary and sufficient condition for favorable policy outcomes. In a weaker view of its influence, favorable public opinion is a necessary condition to alter policy, but also requires the presence of movements and allies in power, to produce policy influence (Giugni 2007). In a weaker view still, public opinion is viewed as epiphenomenal, something manipulated by regimes in power or influenced by social movements; any correlation between public opinion polls and policy may simply be an artifact of challenger mobilization, new political regimes, or changes in policy itself. Somewhere between the second and third option is that public opinion may work more in the way that the institutional politics and political mediation theories view social movement mobilization or having a favorable regime in power. Like these others, favorable public opinion or public support may be a standard INUS condition (Mackie 1980; Ragin 2000): that is, an insufficient, but a non-redundant part of a condition that is itself unnecessary but sufficient for the occurrence of an outcome.

These arguments are assessed with fuzzy-set qualitative comparative analyses (fsQCA) across a more sophisticated and wider set of causal measures, including measures of public opinion. Qualitative comparative analyses of any sort have advantages over regression analyses in being able to address arguments that are both multi-causal and concern equifinality, or positing more than one causal route to a similar outcome. Fuzzy set analyses have a series of advantages over crisp set ones, not the least being that fsQCA is able to retain greater information in its measures and can allow for more theoretically precise calibrations of them (Ragin 2000; 2008). Instead of simply addressing the generosity of state level oldage benefits, we closely examine two measures: the initial generosity of the benefits and the generosity in benefits at the end of the period. We start with analyses of the previous measures and then add the measure of public support for generous pensions. In the second set of analyses, we begin with the initial generosity, which is something like addressing change in generosity. With these new specifications and analyses, we can ascertain how well the initial results hold up, gauge more clearly the different routes to change in public policy, and see where public opinion fits in these analyses.

We find support for the institutional politics and political mediation models. For the generosity in the initial benefit, there are three causal recipes, one which works strictly through institutional politics, a second through movement influences, and a third that is mixed. No individual factor is a necessary condition—each is an INUS condition, a necessary part of a sufficient solution to generosity, where there are multiple solutions. When public opinion in support of generous pensions is added to the analyses, it does not improve the solution in terms of consistency or coverage, though it does appear in two of four solutions. At best, like some of the other factors, it serves as an INUS cause. The results for endpoint generosity indicate that initial generosity is an important influence, lending support to the arguments that explain the initial generosity. These results provide some additional support for a political mediation model and again only tentative support for the public opinion argument.

INSTITUTIONAL POLITICAL, POLITICAL MEDIATION, AND PUBLIC OPINION ROUTES TO PUBLIC POLICY

The initial paper addressed the "institutional political" model of social policy and a "political mediation model" of movement influence over policy. Each of these models includes structural political conditions as well as more short-term influences, and there is some overlap between them. Each expects some political institutional conditions to be necessary to generous social policy and to the influence of movements over policy. Each sees the short-term political conditions to be part of sufficient combinations of conditions leading to policy change. For the institutional political model the central short-term political condition is the rise to power of a left-center regime. These regimes generally are most influential in concert with a well developed domestic bureaucracy, which both pushes for social policy change and provides public confidence that such changes will be well administered. For the political mediation model, it is the joint influence of high mobilization and extensive assertive political activity. This route to policy change is argued to be a kind of functional equivalent to the institutional political one.

Both models have some political institutional structural preconditions. The first is basic democratization, which has been argued to be both a precondition for the influence of movements, as well as for extensive social policy changes through institutional political routes (Key 1949; Hicks 1999). A democratic polity is characterized by meaningful choices among parties or factions (Dahl 1971) in addition to the basic rights of speech and assembly. To put it negatively, a central obstacle to social spending policy is an underdemocratized polity, in which political leaders are chosen by elections, but there are significant restrictions on voting, political participation, assembly, and discussion, and choices among leadership groups. In an underdemocratized political system, there is little electoral reason for politicians to promote policies to aid the less well off; politicians will seek the support of the economically privileged, whose preferences generally stand opposed to social spending. When pro-spending mass movements are able to organize themselves in underdemocratized polities, they are unlikely to win concessions.

A second important political institutional precondition common to both models is the nature of the party system itself. Specifically, patronage-oriented parties are particularly harmful to modern social policy. These are hierarchical organizations that seek to win elections and maintain their organizations through individualized benefits to party workers and other supporters (Katznelson 1981; Shefter 1977). As Mayhew (1986, chap. 10) has argued, leaders of patronage-oriented party organizations are inclined to avoid programmatic benefits, especially because they find threatening the sorts of professional bureaucracies required to run social spending programs. These require trained and qualified workers whose hiring comes at the expense of potential governmental jobs for patronage purposes. Also, programs that provide relatively automatic benefits drain resources from programs that might be deployed in an individualistic way. Furthermore, social spending programs imply higher taxes, reducing the ability of patronage politicians to lower taxes in a selective way to contributors. For these reasons, patronage-oriented parties are

expected to hinder the influence of pro-social spending actors, whether they are left-center political parties or social movement actors.

For the institutional political model, a third institutional influence on policy centers on domestic state bureaucracies. Better developed state bureaucracies are more likely to promote social policy changes and promote public confidence in them. Moreover, we expect state administrators and their policymaking abilities can have an impact on public spending policy (Orloff and Skocpol 1984). Domestic state bureaucracies often structure what is possible in social spending policy and can be influential advocates for social policy change (Heclo 1974), especially if they are unburdened by constraining loyalties to political parties or economic interest groups (Skocpol 1985). Domestic bureaucrats will try to advance and fulfill the social mission of their bureaus, agencies, or departments by devising proposals, lobbying for legislative change, and supporting groups whose goals are similar. These bureaucrats will be effective only if they have wide authority and experience in administrative matters and only in conducive political settings-democratic political systems and nonpatronage-party systems. In an underdemocratized political system, politicians will usually ignore social politics regardless of what bureaucrats do. In patronage-oriented polities, politicians will tend to undermine domestic bureaucracies by staffing them with unqualified party loyalists.

Each model has it own short-term influences, which are expected to be influential in only in conjunction with political institutional factors. For the institutional political model, the main short-term influence is the taking of power of left or center-left regimes, also sometimes called reform-oriented regimes. Under favorable institutional political circumstances these regimes are likely to advance social policy. The "political institutional" model argues that these regimes will have their greatest influence in polities with well developed domestic bureaucracies (see Amenta 1998; Amenta and Halfmann 2001). These regimes tend to favor social policy advances, especially when there are outside incentives for policy to pass. More generally, the election of a reform-oriented executive and large contingents of reform-oriented legislators sends clear signals throughout the political system that new or increased social spending is possible. Left-leaning political appointees in the administration are more likely to demand spending initiatives. Policy bureaucrats are more likely to press new or long-standing proposals. Reform-oriented members of legislatures are likely to make renewed efforts on behalf of their own favored programs, devise new ones, or support executive-sponsored programs. The incentives to press for social spending efforts are high because they are more likely to succeed.

In the United States, where there are only two major parties, the main centerleft party since the 1930s has been the Democratic party. According to this model, U.S. public spending gains occur generally when Democratic or radical third parties take power or form regimes; legislators from these parties to be key supporters of generous social policy. As an example of this influence at the U.S. state level, the difference between states led by Republican and Democratic regimes in accepting federal aid to Medicaid programs through the Affordable Care Act has been dramatic—almost no states run by Republicans have accepted the deal, whereas all Democratic regimes have signed on. However, these regimes are expected to be influential only in the context of structural conditions that promote social spending gains. It is very difficult to have a center or left party rise to power in an underdemocratized polity. For instance, although Democrats typically held power in the South in the United States before the Voting Rights Act of 1965, they had conservative voting records on social policy as they did not represent the same groups the northern Democrats did. Similarly, Democrats from patronage-oriented party systems had different and less pressing social policy priorities than those that came from non-patronage-oriented systems (see Amenta 1998). For these reasons, we do not treat all Democrats as part of a "center" party (Hicks 1999) whose rule is expected to provoke moderate spending increases.

A second set of short-term influences are from social movements. According to the political mediation model, under favorable political institutional conditions well mobilized challengers that engage in extensive assertive action may serve as a kind of functional equivalent to the "institutional politics" route to produce social policy change (Amenta et al. 2005). Assertive action means to challenge the political prerogatives of institutional actors. There are several ways to engage in this. One is to expend resources to endorse and support candidates for office in exchange for the candidate's backing of movement's issue. Successfully running candidates for office is a second. Another is to attempt to override the prerogatives of institutional political leaders through initiatives and referendums (Amenta 2006).

The political mediation model brought somewhat different expectations to the fore. One was that mobilization might serve as a kind of functional substitute for having a Democratic party regime in power, if structural conditions were otherwise favorable for social policy change. A second was that assertive action, in democratic polities without patronage parties, would be sufficient to bring about favorable social policy changes. In addition, if such left or center parties in power, the influence of movements would be amplified further. The best case scenario for the most extensive policy change would be for all such conditions to occur at one time.

Finally, we address public opinion. It has been treated several different ways by the literature. There is a strong view and a weaker one. The strong view is that public opinion when it is favorable and the issue is salient will be the main determinant of public policy (Burstein 2002; see review in Amenta et al. 2001). A weaker view is that favorable public opinion will be another necessary condition for the influence of social movements (Giugni 2007). According to this model, for movements to be influential they will have to be well mobilized with favorable political regimes in power, as well as have public opinion on their side. However, some argue that regimes in power influence public opinion far more so than it influences their policies (Jacobs and Shapiro 200x) and that the only public opinion poll that really matters is the one that elects officials, who then act on previously stated preferences.

U.S. OLD-AGE POLICY, POLITICS, AND THE PENSION MOVEMENT, 1934-1950

The Democrat Franklin Roosevelt was elected president in 1932 in the midst of the Great Depression and immediately sought to alleviate the misery of it through various relief programs. In 1934, congressional elections bucked history by

backing the party of the incumbent president and sweeping Democrats into a position of unquestioned authority. They could potentially pass legislation without the support of southern Democrats, who were mainly from underdemocratized polities with repressive labor regimes and unfavorable to national social spending programs (Amenta 1998).

After these elections, there was a spate of social policy reform as the United States began to create a lib-lab social policy in the manner of English-speaking and Nordic states (Hicks 1999; Mann 2012). Roosevelt called for about \$5 billion in spending for works programs, which were adopted and then administered through the Works Progress Administration. Congress also passed in August 1935 the Social Security Act, an omnibus reform bill that among other things created two oldage programs. Old Age Assistance, a federal-state matching program, immediately provided benefits to the aged in states that passed appropriate legislation. All states did so by 1937. OAA was the workhorse of old-age protection during the Depression, Second World War, and immediately afterward. It was not eclipsed by Old Age and Survivors Insurance (known today simply as "Social Security") until the 1950s. Roosevelt was reelected three times and the Democrats continued to dominate Congress until 1939.

These reforms occurred also in the context of extensive social movement activity, perhaps none as extensive as the old-age pension movement, which in turn was initially dominated by the Townsend Plan. This organization was founded in January 1934 by Dr. Francis E. Townsend, a laid-off, 66-year-old Long Beach medical assistant, and Robert Earl Clements, a 39-year-old real estate broker. (This discussion relies on Amenta 2006.) The purpose of the organization was to promote the enactment of the pension and recovery program Townsend had first outlined in some letters to the editor of the *Long Beach Press Telegram* in September 1933. The plan called for \$200 monthly pensions to almost all non-employed citizens over 60 years and was designed to end the Depression and ensure prosperity, as well as to end poverty in old age. To maintain enthusiasm and mobilize resources, Clements and Townsend inaugurated Townsend clubs—local affiliates that met regularly to hear speakers, collect donations, and act in political campaigns. These clubs mobilized in the West as the administration was considering its old programs and certainly had a role in their deliberations. Although the Townsend Plan attempted to substitute its legislation, reduced to about \$60 per month, for the Social Security Act, a version of it was defeated in April 1935 and the Social Security Act was passed instead.

Presumed dead, the Townsend Plan grabbed national attention in late 1935, after an endorsed candidate improbably won an off-year congressional race, and began organizing clubs at the rate of one every two hours. At its peak it included about 1.5 million members in about 8000 clubs. The Townsend Plan remained strongest in the West, but made inroads throughout the country, except the South, where its main outpost was in southern Florida. Although the Townsend Plan fell into dissension and lost membership after being investigated by Congress in 1936, it soon regrouped and fought the 1936 elections, endorsing candidates for Congress and opposing Roosevelt's reelection.

Soon the Townsend Plan was augmented by a number of pension organizations and collective action campaigns. Notably, a group known as Ham and Eggs won national attention in 1938 with its program to provide \$30 every Thursday to aged Californians; in eight other states that year organizations were created briefly around specific initiatives for more generous old-age pensions. The elections of 1938 brought losses for all these pension initiatives and for the Democratic party, as the country was struggling through a sharp economic downturn called by the president's opponents the "Roosevelt Depression," and which the administration dubbed a "recession." In the House races, the president's party was severely punished, losing 100 seats, and many radical third party members were also defeated. It ended the party's ability to promote social legislation without some help. However, the congressional elections brought very good news for the Townsend Plan. About 60 percent of the approximately 250 House candidates it endorsed and 14 endorsed senators were elected. Townsend Plan endorsees, mainly Republicans, constituted the entire incoming House delegations of the states of Florida, Maine, Oregon, Arizona, Wyoming, North Dakota, South Dakota, Montana, and New Hampshire. In Indiana, all six endorsed Republicans who opposed incumbent New Deal Democrats were victorious. Two targeted members of the House Ways and Means Committee also went down to defeat.

The only social issue that had a chance to advance in such circumstances was support for the elderly. Much of that had to do with the initial set up of old-age programs, different aspects of which irked powerful political players. The administration wanted to spend more sooner—its old-age annuity program was still not paying out anything—and make the program pay as you go. The administration saw the burden of payroll taxes without spending as a cause of the recession. The Social Security Administration wanted to convert the old-age annuity program into social insurance and add survivors' insurance. Republicans were anxious to lower and prevent the inexorable rise of payroll taxes, which had been legislated to increase in steps, and were willing to deal. For its part, the pension movement wanted to substitute the current old-age programs with universal and generous pensions. A series of bills were considered, including a Townsend Plan-sponsored bill in the House and the Senate's so-called Lee amendment, which would have created a widespread \$40 per month old-age benefit, about twice as high as the average benefit through OAA, though it was the median amount that public opinion polls indicated that the government should pay in monthly old-age benefits (Gallup 1936, 1938). Both moves failed. In the end, through a series of compromises, Congress lowered payroll taxes, sped up payments for the old-age insurance program, converted it into a pay-as-you quasi-pension program—the earliest recipients had to pay almost nothing to get full benefits. It also upped the matching payments for Old Age Assistance to \$20 per month per person, giving states incentives to increase the generosity of their own programs.

Roosevelt was reelected again in 1940, the Democrats rebounded in the House, and the Townsend Plan was again successful in its endorsement of representatives, this time mainly backing Democrats, and pension legislation again came before Congress in 1941, with an excellent chance of passage. But World War II intervened, moving domestic issues off the national agenda. In response, the pension movement concentrated its efforts on the state level, where Old Age Assistance programs still were the dominant means of support for U.S. elderly. The Townsend Plan notably placing pension propositions on the ballots of a few western states in 1943 for \$60 per month pensions. In 1950, after the election of President Harry S Truman and a Democratic Congress, the old-age and survivors' insurance program was significantly improved, supported in part by conservatives because of fears that Old Age Assistance programs in some states were becoming overly generous. The Townsend Plan was eclipsed in its own state by an organized focused solely on improving California's version of Old Age Assistance and later nationally by the AARP.

PREVIOUS RESEARCH: CRISP-SET ANALYSES OF BENEFIT GENEROSITY

Amenta et al. (2005) examined two main outcomes regarding old-age policy. The first was the generosity of state-level Old Age Assistance programs. They varied quite substantially, with California's program initially more than six times more generous than Mississippi's. The change in these benefits also varied, as some states took advantage of the 1939 Social Security Act amendments and others stayed closer to their initial allocations. We also examined our theoretical expectations by way of analyzing roll-call votes for social policy legislation (McAdam and Su 2002; Soule et al. 1999) [and we do not at this time have new results for this outcome]. The expectations for influence of the both the institutional politics and political mediation models are multiply combinational, which is why they were initially assessed using qualitative comparative analyses (see Ragin 1987; 2000; 2008). These algorithms are designed to appraise combinational causal arguments and assess causal heterogeneity. In the original results (Amenta et al. 2005), we employed crisp rather than fuzzy sets as many of the measures of theoretical interest were nominal ones and partly because fuzzy set analyses were new and confusing to reviewers, as well as to the lead author.

QCA and the Generosity of Old Age Assistance Benefits

The main outcome measure was *a generous OAA benefit* (U.S. Social Security Board v.d.). To control for inflation, OAA benefit size was adjusted to 1950 dollars (Bureau of Labor Statistics 2004). To determine which states provided generous OAA benefits, we averaged the residuals of a baseline modeling including only per capita income and percentage aged for each state across the entire time period from 1936 to 1949. We designated the 13 states that had a residual that was greater than 10 percent of average spending as generous spenders, where there was also a large break in the data. The 10 states falling between zero and 10 percent were coded as "don't care" cases, and the rest were coded as zero.

As for the causal measures, there were two political institutional ones, each of which apply to both the institutional politics and political mediation models that were tested. States that employed a poll tax during this period were designated POLLTAX. (In QCA, a measure written with all capital letters denotes its presence, while one written in all lower case denotes its absence.) States that were largely controlled by PATRONAGE party organizations are those that score either of the top two values on Mayhew's (1986) five-point scale. In each case, the absence of these systemic and long-term conditions was expected to be a necessary condition for influence. That is, they are both considered structural obstacles to generous social policy.

The institutional politics model involves paths to change through those processes and included two more measures. Those states where the labor commissioner had rule-making authority over safety laws throughout the period were labeled ADMIN. This is considered a kind of medium-term condition. States where the Democratic Party controlled the governor's mansion and both houses of the legislature for at least 40 percent of the time were considered DEMOCRATIC. The presence of both is required by the model to produce influence.

The political mediation model had two different causal measures. States that had ever reached the highest level of Townsend club presence were considered to be highly MOBILIZED. For our measure of pension movement collective action, we used the pension initiative measure, the most assertive action focused at the state level. States where the pension movement placed one or more proposition on the ballot scored as having engaged in ASSERTIVE collective action. The political mediation model requires either the presence mobilization plus some other institutional stimulant to policy, or extensive assertive action to produce influence. To summarize, the configurational theoretical expectations from the institutional politics model of social policy for generous old-age spending, net of economic controls, are as follows:

polltax*patronage*ADMIN*DEMOCRAT.

(In FSQCA notation, an asterisk (*) indicates the logical operator *and*; a plus sign (+) indicates the logical operator *or*.) This expression reads as follows: States without poll taxes and without patronage-oriented parties and with strong administrative powers and with Democratic party regimes are expected to produce generous social programs.

Although the political mediation argument had some similar components, it is more complex and was modeled as follows:

polltax*patronage*(MOBILIZED*ADMIN + MOBILIZED*DEMOCRATIC + ASSERTIVE)

This means that in structurally conducive situations and politically favorable medium- and short-term situations, only high challenger mobilization is needed to produce collective benefits such as high pension benefits. That is to say, high challenger mobilization is a kind of functional equivalent to either administrative powers or having a Democratic regime in power. However, when other mediumand short-term political conditions are less favorable, more assertive action is needed, but is sufficient to bring results.

The results, reduced to the three expressions above, largely supported the expectations of both models.

polltax*patronage*ADMIN*DEMOCRAT +

polltax *patronage*DEMOCRAT*MOBILIZED +

polltax*patronage*ASSERTIVE

These combinations accounted for 11 of the 13 positive cases, as well as one don't care case. The institutional political model was represented by the first expression. The political mediation model was represented by the latter two expressions. A third expectation of the model was not borne out by the results, but the results still constituted strong support.

THE CURRENT RESEARCH: FUZZY-SET ANALYSES OF BENEFIT GENEROSITY

Although the previous analyses were labeled fuzzy set qualitative comparative analyses (fsQCA) that was true only in the residual sense that crisp set qualitative comparative analyses are a subset of fuzzy ones. A decade later it is pretty easy to see ways to improve. It is possible both to retain more information in the measures, many of which were not categorical to begin with, and to calibrate them to more closely conform to the expectations of theory. Also, fuzzy-set analyses make it possible to determine the consistency and the coverage of different causal combinations or recipes. The consistency of the combination is the degree to which any solution term or the solution as whole is a subset of the outcome; it is a kind of measure of goodness of fit. The coverage is the percentage of the outcome set constituted by individual or entire solutions; the coverage is analogous to the degree to which the individual solution or solution as whole explains the outcome.

In addition, we seek to ascertain whether favorable public opinion supersedes or supplements the explanations. As we have seen above, there are strong and weak versions of the influence of public opinion. In the strong version, strongly favorable public opinion would be enough in itself to produce favorable policy results if the issue is salient.

PENSION GENEROSITY = PUBLIC SUPPORT*ISSUE SALIENCE

Given that the issue was highly salient in its first three years at least and very likely further, this model reduces to simply high public support. In the weak version, public opinion support is yet another necessary condition to a favorable policy outcome, in this case high pension generosity, already requiring favorable institutional political and movement political conditions. In a more stringent political mediation model proposed by Giugni (2007), high public support is a necessary condition for movement influence, along with high mobilization and institutional political allies. This model says little about structural political obstacles, but in the spirit of the argument and given the circumstances of the U.S. polity we will also consider their absence to be necessary for influence. The model does not say anything specific about assertive political action and this is left out.

PENSION GENEROSITY =

polltax*patronage*ADMIN*DEMOCRAT*MOBILIZATION*PUBLIC SUPPORT

To summarize, in the strong view, high public opinion is considered sufficient unto itself to explain public policy outcomes in movement-related issues and the only question is whether movements can influence public opinion. In the weaker view, public opinion becomes another necessary condition for movement influence, on top of other fairly stringent necessary conditions. The weakest view is that public opinion is simply unnecessary for influence. And there is probably a middle view in between the last two, in which favorable public opinion is a necessary condition in a path to policy that is sufficient, but is not itself necessary for the outcome to occur. That is, it would be an INUS condition, similar to what the combined institutional politics and political mediation models would expect for some determinants of policy change—that there is more than one multiple solution to the outcome and that no shorter term standard political or movement influence is necessary, but that each of them figures into sufficient causes.

Measures and Calibrations

As with the previous research, our first outcome concerns the generosity of old-age benefits. Previously this was a categorical measure, with generosity residualized on income and the percentage old age in the state, and the top 13 states scored as one. Here we analyze three different outcomes, each of which benefits from the calibration of fuzzy sets. The first is initial generosity, measured from the residualized initial old-age assistance benefit taken from the first three years (1936-1938) of data on benefits (except for Virginia, whose records start in 1939), using constant (1950) dollars. The measure is calibrated with states with scores of 7 and above as full membership in the set of generous benefits, states with scores of -7 being all the way out of the set of generous benefits. For fuzzy sets researchers must also select an inflection point at which a case is halfway in or out of the set. For this measure, we choose -1 as the crossover point [why exactly—note that results do not depend on it, if in fact they do not]. A second outcome measure is the average generosity across all 14 years (1936 through 1949) of data. It is also a residualized measure of constant dollar benefits on income, and calibrated similarly. Finally, we address the end-point generosity, which is generated by taking the average of the last three years of data, residualized and calibrated as above. We are interested to see if the initial results will explain the end results in the manner of panel analyses, but focusing on individual cases.

The first set of causal measures includes political institutions. These do not vary greatly over time and they are only in one instance susceptible to calibrations into fuzzy sets. The first one is a voting rights measure based on the existence of POLL TAXES in states; it does not vary significantly and remains categorical. A second one, and also hypothesized as an obstacle to pension generosity, is a measure of PATRONAGE-oriented political parties. This is based on qualitative measure designed by Mayhew, scoring 1 for states with parties having a low patronage orientation, five for high patronage orientation, and others falling in between. This is calibrated with five being scored 1 (or complete membership), one being scored zero (or completely out), with three being scored (.5). The last political institutional causal measure concerns state-level domestic state capacities: ADMIN, an administrative capacity measure indicating states having labor commissioners with rule-making authority. This measure is expected to have a positive influence and remains categorical.

Each of the next set of causal measures varies over time and is receptive to more precise calibrations. In each instance, too, different measures are employed for initial benefit generosity as opposed to the average generosity across the entire period and the endpoint in generosity. The measure of DEMOCRATIC party regime previously counted as a 1 if states had such regimes 40 percent of the time or more over the 14-year period, which was deemed a sufficient interval to upgrade pensions. We calibrate it similarly with 40 percent all the way in and zero being all the way out and with the crossover point being at 30 percent to be consistent with the original thinking and analyses. For the initial benefit, a state is considered fully in the Democratic regime set if Democrats were in control for two or more years, all the way out for zero years, and halfway in with one.

Also better calibrated are the movement measures. The Townsend club mobilization measure was based on a score ranging from zero to four, with four the highest level. A state was given the score of its highest mobilization in the period with states at three or four considered to be highly MOBILIZED and those below not highly mobilized. Here we score them similarly, but for the period through 1941, the heyday of the Townsend Plan, with four being all the way in, and one or below all the way out. Scores of three are counted as .67, and scores of two as .33. There is a separate score, calibrated the same way, involving only the first three years, to be used in the analyses of initial generosity.

As for assertive action, previously a state with any initiative in the entire period was counted as having engaged in such activity. However, some states had more initiatives than others. To take that into account, the new ASSERTIVE measure counts a state as fully in with two or more initiatives, all the way out with zero. The crossover point at set at 0.5, to give fairly high credit to states with one initiative and to be consistent with the previous arguments and operationalizations. For the initial period of old-age benefits, initiatives do not work as a measure of assertiveness, as the first ones were in 1938. We substitute the percentage of the congressional delegation that was elected with the support of the Townsend Plan in 1936. Although these actions were targeted at the national level, they have been argued to have influenced state-level politics, too (Amenta et al. 1992). A delegation that was one half or more endorsed by the Townsend Plan counts as all the way in, one with no endorsed members is out. The crossover point is set at 15 percent, given that even a small delegation would be a significant showing and to be consistent.

We also include a measure of public opinion. The Gallup organization did the most extensive polling about old-age policy, and its first old-age polls in late 1935 and early 1936 (Gallup 1935, 1936a, 1936b) were largely in response to the rise of the Townsend Plan. We calibrate the results of a large Gallup poll from 1938, involving approximately 3000 respondents, asking *"How much per month* should be

paid to a single person?" The median choice in 1938 was \$40, which was twice as much as the average OAA benefit at the time. Given that \$40 would go much less further in New York than Mississippi, we also residualize this measure on income. States scoring at 10 are all the way in the set of public SUPPORT for generous oldage benefits, -10 or below all the way out, with zero being the crossover point.

ANALYSES AND RESULTS

For each of the outcome measures, we include in the analyses all the causal measures except the public opinion measure SUPPORT. As with the results in the previous article, preliminary analyses revealed that the absence of the measures of the structural obstacles POLL TAX and PATRONAGE constituted necessary conditions to all the major solutions. Because it is valuable to reduce causal measures in OCA, as the number of possible truth table combinations increase by a multiple of two for new measure, we combine these into a structural political OBSTACLES measure by way of the set function union. That is to say, for OBSTACLES each case receives the highest score for either component measure. If a state scores 0 on POLL TAX and .75 on PATRONAGE, it scores .75 for OBSTACLES. Similarly if the state scores 1 on POLL TAX and .25 for PATRONAGE, it scores 1 for OBSTACLES. Both institutional political and political mediation theories expect the absence of the combined measure of political structural OBSTACLES to generous benefits to appear in all solutions. We do this in part to reduce the number of potential empty truth table rows (which are the corners of fuzzy set vector spaces) in the analyses. With five measures in the initial analyses, there are $32(2^5)$

potential truth table rows, and for the six-measure results, there are 64 (2⁶), yet only 48 states to allocate among them. Thus many truth table rows will be not be represented in the data. As these "remainders" do not exist, any assumptions about their outcomes would be counterfactual. Because the number of cases is fairly low, we employ a frequency threshold of one and use the standard .80 consistency level (Ragin 2008). However, all of the individual and combined solutions below easily surpass this standard.

In these analyses we use the "intermediate" solution, the most theoretically justifiable of the three that are possible. Unlike the "complex" solution in which all non-existent rows or remainders are assumed to be negative or false cases, or the "parsimonious" solution in which any remainder is set to any value that will generate a simpler solution, the intermediate solution relies on theoretical connections between the causal measures and the outcome. For the institutional politics and political mediation models, the obstacles are expected to have a negative effect on generosity, whereas every other measure, whether related to institutional politics, political mediation, or public opinion, is expected to have a positive influence. (The exception is that Democratic party regimes are not expected to have a positive influence in the poll tax states.) The intermediate solution incorporates these assumptions into the analyses.

We start with the results for the initial generosity in benefits. The results provide are largely consistent with the previous crisp set results. In the fivemeasure analyses, those without public opinion, there are three solutions that are 94 percent consistent with the outcome and cover 60 percent of it. The individual solutions support some aspects of the institutional politics and the political mediation models. The absence of obstacles appears in two of the three solutions for pension generosity, largely in accordance with the institutional politics model, and as well by the political mediation model. A high level of mobilization appears in two solutions as well, providing strong support for movement arguments. There is considerable overlap among the solutions, as most of the states covered appear in more than one solution.

[Table 1 about here.]

As for the individual solutions, there is support for both institutional politics and political mediation models. One of them fits closely the standard institutional politics model and includes the absence of obstacles and the presence of both administrative powers and a Democratic party regime. This solution is consistent at 91 percent and covers 27 percent of the cases. The other two solutions involve some social movement influence. In each instance, mobilization is a necessary condition for generous pensions. In one solution, high mobilization combines with both shorter-term political institutional political factors as well as assertive activity to produce generosity (ADMIN*DEMOCRATIC*MOBILIZED*ASSERTIVE). This solution indicates a path to generosity through patronage-oriented political parties, as Ohio appears here. The third solution involves assertive political activity (obstacles*democratic*MOBILIZED*ASSERTIVE), and indicates a route to influence in traditionally Republican states. This solution is 97 percent consistent with the outcome set and covers 29 percent of it. Although this solution is consistent with political mediation thinking, assertive activity is not sufficient in states without obstacles, as the model expects; high mobilization also appears in the solution.

The next analyses include public opinion and provide little evidence for its causal role regarding generous old-age benefits. The results including the previous measures and the public opinion measure slightly lower the coverage and the consistency of the overall solutions. However, a high level of support does appear in two of four solutions. High public support for pension generosity augments an institutional politics solution (ADMIN*DEMOCRATIC*SUPPORT) and a political mediation solution (obstacles*democratic*MOBILIZED*ASSERTIVE*SUPPORT). Two other causal paths to generosity in benefits do not include public opinion support for generous old-age benefits. In short, the results for initial generosity in old-age benefits suggest that like many of the institutional political and movement determinants, at best favorable public opinion is an INUS type of causal condition. It may be necessary for some causal routes to policy generosity, but falls well short of being a necessary condition and nothing like a sufficient one, even for one causal pathway. And it adds little to the explanation provided by the institutional politics and political mediation models.

[Table 2 about here.]

Next we turn to the average generosity of old-age benefits from the beginning of the program through 1949. It is possible that public opinion did not have a chance to influence benefits in the initial period, and the results provide some support for public opinion support as an INUS condition. In the five measure results, there are three solutions, which as a group are 91 percent consistent with the outcome and cover about 46 percent of the cases. Each solution relies on a lack of obstacles and the presence of the administrative strength measure. The two overlapping solution include the presence of mobilization or both it and assertive. When high public opinion is added, there are three solutions, which are consistent with the outcome at 93 percent rate and cover 55 percent of the generous cases. This time only the absence of obstacles is a necessary condition (appearing in all solutions). One of the three solutions includes favorable public opinion, which once again serves as a kind of INUS condition. However, most of the increase in coverage is due to a solution that includes the *absence* of public opinion support for generosity.

[Table 3 about here.]

Finally, we address the generosity of benefits in the endpoint of the period. In each of these models the generosity of the initial benefit is entered as causal condition with the potential to explain generosity at the end of the period. The results without public opinion include three solutions that are 84 percent consistent with the outcome and cover 65 percent of the cases. In three solutions, the presence of initially generous benefits appears; in two of these there are no other positive influences for change. In the third, the presence of mobilization and assertive activity are included. An additional solution, with high initial generosity, indicates a secondary political mediation route to influence, with the lack of obstacles, the presence of a Democratic party regime and the presence of high mobilization. The results when adding public opinion do not mark an improvement, as coverage declines (and are not shown). However, there is one solution that is of interest—in which initial generosity is present along with assertive activity and public opinion poll support for generous benefits. This solution covers the state of Ohio, which was beset by patronage-oriented parties. The result suggests that public opinion, in combination with other conditions may be influential in such circumstances.

DISCUSSION AND CONCLUSION

The results here are tentative, but overall they tend to uphold the previous ones in Amenta et al. (2005) in that there are several causal paths to generosity in benefits, that these paths rely on structural political openings, that institutional political causes and movements can drive social policy on separate and functionally equivalent causal paths. All that is true to explain generosity in the initial old-age benefit as well as for the average pension across the period. Because the initial generosity in benefits is a key determinant of the generosity at the endpoint of the analyses, the determinants of the initial generosity have secondary and lost lasting effects. This suggests the influence of both institutional political factors and movement effects can be influential for the long term, most likely through path dependence in policy making. The specific paths to generosity in benefits lend support to the institutional and political mediation models. One of them follows thinking based in the institutional politics model and covers 27 percent of the outcome, whereas two of them involve both movement mobilization and assertive action, but only under some favorable structural conditions. Of the latter two, one causal solution relies on movement mobilization and action as the driving short-term forces for change and uniquely covers some 29 percent of the outcome. A second solution requires all shorter term institutional politics and movement politics factors. In this instance, it is also possible to overcome the obstacle of patronage-oriented parties, which is the lesser of the political institutional barriers to policy advancement.

For the most part, the results do not support claims regarding the influence of public opinion on generosity. When a measure regarding public support for generous benefits is added to the analyses including the other causal sets, it aids in the explanation only of the average pension benefit and then only because its absence appears in a new solution. Thus the results reject the strong view that favorable public opinion will determine policy results when the issue is salient. The results also reject the weaker view that public opinion support is a necessary condition for movement influence, along with other political institutional support. To the extent that the results show any influence of public opinion, it is along the lines of being an INUS cause, necessary to a combination of factors that is itself unnecessary but sufficient to produce the outcome.

There are some limitations to these results, especially regarding the appraisal of the influence of public opinion. Several aspects of the processes by which public opinion polls are said to influence policy-makers (see Manza and Cook 2002) were not fully operative in the 1930s. At that time, polling was not nearly as extensive as it is today, appearing episodically in the wake of news events; old-age polling was frequently motivated by mobilizations by the Townsend Plan and other old-age pension advocates. Also, state-level figures were not available to policymakers, who, like everyone else, could read only summary versions of Gallup's national results and interpretations in the Washington Post or in syndication. Worse, questions were often poorly worded, and Gallup sometimes misinterpreted his results (Amenta 2006). In addition, in this particular poll, there were only about 60 respondents per state and so it may not give a completely accurate account of this opinion. All that said, this was pretty much the best-case scenario for polling at the time. It suggests that public opinion as ascertained through extant public opinion polls did not have much influence on U.S. social policy during its formative years.

Another limitative comes from coverage of the analyses. Here we have not yet produced the results for the roll call vote. In the previous article, we analyzed the so-called Lee amendment (S76-1061) to 1939 Social Security Act amendments calling for a \$40 a month national pension (ICPSR 1997; Rosenthal and Poole 1991, 2000). Although the amendment failed, 17-56, putting on the congressional agenda a radical alternative and lining up votes behind it (Kingdon 1983) is one way for a challenger to have influence over the political process and public policy, as this show of force may induce opponents to accept more moderate legislation. The initial crisp-set analyses upheld similar institutional politics and political mediation arguments, and we hope to have some fuzzy-set results for presentation by the time of the meeting. We also plan to address the question of whether movement action or institutional political processes influence the public support for generous old-age benefits.

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Solution	Consistency	Coverage	Unique Coverage
obstacles*ADMIN*DEMOCRATIC	0.913	0.272	0.156
States: UT, AZ, CO, NV, ID, MT, WA			
obstacles*democratic*MOBILIZED*ASSERTIVE	0.966	0.294	0.294
States: ME, MN, SD, CA, ND, NE, OR, WI			
ADMIN*DEMOCRATIC*MOBILIZED*ASSERTIVE	0.884	0.152	0.037
States: OH, ID, MT, WA			
Total	0.943	0.603	
Solution	Consistency	Coverage	Unique Coverage
obstacles*ADMIN*DEMOCRATIC*MOBILIZED	0.901	0.194	0.042
States: AZ, CO, ID, MT, WA			
obstacles*ADMIN*MOBILIZED*ASSERTIVE	0.917	0.291	0.100
States: ID, CA, ND, NE, OR, WI, MT, WA			
obstacles*democratic*MOBILIZED*ASSERTIVE*SUPPORT	0.974	0.167	0.091
States: ME, MN, SD, OR, WI			
ADMIN*DEMOCRATIC*SUPPORT	0.902	0.250	0.140
States: UT, CO, OH, TN, NV, MT, WA			
Total	0.933	0.601	

Table 1. Five- and Six-Measure FsQCA Solutions for Initial Old-Age Benefit Generosity, 1936-1938.

Table 2. Five- and Six-Measure FsQCA Solutions for Average Old-Age Benefit Generosity, 1936-1949

Solution	Consistency	Coverage	Unique Coverage
obstacles*ADMIN*MOBILIZED*ASSERTIVE	0.926	0.321	0.099
States: AZ, WA, CA, CO, ID, ND, NE, OR			
obstacles*ADMIN*democratic	0.901	0.359	0.137
States: NV, CA, CO, ID, ND, NE, OR, MT, WI			
Total	0.913	0.458	

Without Public Opinion Support for Generous Pensions

With Public Opinion Support for Generous Pensions

Solution	Consistency	Coverage	Unique Coverage
obstacles*ADMIN*MOBILIZED*ASSERTIVE	0.926	0.321	0.099
States: AZ, WA, CA, ID, ND, NE, CO, OR			
obstacles*ADMIN*democratic*SUPPORT	0.890	0.197	0.097
States: NV, CO, OR, MT, WI			
obstacles*democratic*MOBILIZED*support	0.961	0.287	0.120
States: IA, KA, CA, ID, ND, NE			
Total	0.931	0.550	

Table 3. Six-Measure FsQCA Solutions for Endpoint Generosity in Old-Age Benefits, 1936-1949.

Solution	Consistency	Coverage	Unique Coverage
INITIAL*admin*democratic	0.820	0.212	0.183
States: CT, IA, KA, ME, MN, SD, WY			
INITIAL*obstacles*democratic*mobilized	0.870	0.056	0.032
States: NV			
INITIAL*democratic*MOBILIZED*ASSERTIVE	0.863	0.208	0.135
States: CA, CO, ID, ND, NE, OR, OH			
obstacles*DEMOCRATIC*MOBILIZED	0.894	0.287	0.200
States: AZ, WA, FL			
Total	0.843	0.654	

Without Public Opinion Support for Generous Pensions