

Age for Leisure? Political Mediation and the Impact of the Pension Movement on U.S. Old-Age Policy

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This article elaborates a political mediation theory of the impact of social movements on states and policy, positing that the influence of mobilization and specific strategies of collective action depends on specified political contexts and the type of influence sought. Examining the influence of the U.S. old-age pension movement, which involved millions of people, this article appraises the mediation model using state-level data from the 1930s and 1940s on Old Age Assistance—the main support for the aged at the time—and a Senate vote for generous senior citizens' pensions in 1939. Our models control for other potential influences, notably public opinion, which is often ignored in empirical studies and sometimes claimed to be responsible for causal influence mistakenly attributed to challengers. We employ pooled cross-sectional and time series analyses and fuzzy set qualitative comparative analysis (FSQCA), which is especially suited to appraising the combinational expectations of the political mediation model. Both sets of analyses show that the pension movement was directly influential on the outcomes and provide support for the political mediation arguments.

Scholars have increasingly turned their attention to the consequences of social movements (cf. McAdam, McCarthy, and Zald 1988 and Amenta and Caren 2004). Much of this work has focused on the external consequences of movements, especially those relating to states and struggles over legislation. Despite this work, one reviewer (Giugni 2004) recently argued that our knowledge accumulation on the subject has thus far been minor. Others

(McAdam 1999; Zald 2000) argue that the political process and resource mobilization models do not help to explain the consequences of these movements. Other reviewers (Burstein and Linton 2002) claim that quantitative analyses in this area have frequently been misspecified and that when public opinion is taken into account challengers are found to have little direct influence on state-related outcomes.

In this paper, we seek to contribute to this debate by elaborating and appraising a political mediation theory of social movement consequences (Piven and Cloward 1977; Amenta, Carruthers, and Zylan 1992; Skocpol 1992; Amenta, Bernstein, and Dunleavy 1994; Fording 1997; Amenta, Halfmann, and Young 1999; Lipset and Marks 2000). Instead of asking whether movements are generally influential or whether certain aspects of movements are always influential, as others have done, we

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ask under what conditions are social movements likely to be influential. Our political mediation theory holds that political contexts mediate the influence of challengers' mobilization and strategies. We argue that in some favorable contexts mobilization may be enough in itself for a challenger to exert influence and that under more difficult political circumstances more assertive strategies are needed. In yet more difficult political contexts (which we specify), a movement may not be able to exert any influence. Moreover, we argue that it takes a combination of favorable political contexts, mobilization, and assertive actions to bring about far-reaching state outcomes. We specify what constitutes long- and short-term favorable and unfavorable political contexts, as demanded by critics of previous social movement research (Goodwin and Jasper 1999); these differ from the standard four of the political opportunity model (McAdam 1996; Tarrow 1996). We also reconceptualize what counts as an assertive strategy (cf. McAdam 1999; Kitschelt 1986), as previous definitions have been too broad to address different means employed by state-oriented challengers.

We appraise the model and some alternatives by analyzing the impact of the U.S. old-age pension movement on old-age policy in its formative years. Though largely forgotten today, the old-age pension movement was a major political phenomenon. The Townsend Plan,¹ the largest mass pension organization, was formed in 1934 and in less than two years had organized two million older Americans into Townsend clubs behind the slogan "Youth for Work—Age for Leisure." Townsend Plan supporters made up one of only about thirty

social movement organizations ever to attract 1 percent or more of the U.S. adult population (Skocpol 2003). In 1936, the Townsend Plan was the subject of more than 400 articles in the *New York Times*, placing seventh among all twentieth-century social movement organizations (see Table 1) in number of mentions in their peak year. In addition to the Townsend Plan, many notable state-level pension organizations demanded generous support for the aged—senior citizens' pensions—rather than the subsistence-level assistance or restricted, wage-related annuities provided or promised by the 1935 Social Security Act. The old-age pension movement case is a useful one to appraise political mediation theory as the movement varied greatly in its mobilization and actions and operated in multiple political contexts, across states and times.

In addition, because the theory has implications for different outcomes, we employ a variety of data on outcomes. The first data set concerns state-level Old Age Assistance (OAA) programs, which were the main support for the aged from 1936 through 1950. We examine the generosity of OAA stipends and the program's coverage among the aged population. These two outcomes add leverage to our analysis, because the pension movement's claims and strategies largely focused on the amount of benefit, rather than extent of coverage, and thus we would expect that the presence and activity of pension organizations would influence the amount of benefit more than the coverage. We also examine which senators voted for a 1939 measure aiming to transform U.S. old-age policy into generous senior citizens' pensions for most adults over 60 years. The political mediation model holds that effecting radical change requires more extensive determinants than does influencing more moderate programs, and the voting data address these claims. We use two methods to appraise arguments: multiple regression analysis and fuzzy set qualitative comparative analysis (FSQCA), the latter of which facilitates the examination of complex and multiple causal arguments (Ragin 1987, 2000), such as those of the political mediation model. Each type of analysis supports our claims.

¹ Although most scholars, following Holtzman (1963), refer to this organization and phenomenon as the "Townsend movement," we call it the Townsend Plan first and foremost for historical accuracy. Robert Earl Clements, the organization's initial leader, thought "Townsend Plan" was appealing and used that name. The newspapers did likewise. The *New York Times* index accordingly refers to the Townsend Plan and searching ProQuest for "Townsend movement" misses most articles on the Townsend Plan. Also, the Townsend Plan was a social movement organization rather than a movement. In addition, "Townsend Plan" later became the official name of the organization.

Table 1. Top 25 U.S. Social Movement Organizations in the 20th Century, by Mentions in Articles in Peak Year, in the *New York Times* and the *Washington Post*

Organization (Peak Year)	<i>New York Times</i> Articles	<i>New York Times</i> Front Page	<i>Washington Post</i> Articles
1. American Federation of Labor (1937)	1,050	205	476
2. Black Panthers (1970)	1,028	111	617
3. CIO (1937)	786	186	325
4. NAACP (1963)	762	128	446
5. Ku Klux Klan (1924)	672	180	339
6. Anti-Saloon League (1930)	409	99	91
7. Townsend Plan (1936)	402	68	118
8. Students for a Democratic Society (1969)	381	90	174
9. Congress of Racial Equality (1963)	369	32	86
10. America First Committee (1941)	280	24	121
11. American Legion (1937)	263	70	200
12. John Birch Society (1964)	255	32	128
13. League of Women Voters (1937)	246	4	117
14. American Civil Liberties Union (1977)	231	24	102
15. Moral Majority (1981)	221	10	268
16. Southern Christian Leadership Conference (1968)	215	36	142
17. German American Bund (1939)	200	32	71
18. Student Nonviolent Coordinating Committee (1966)	195	47	76
19. Veterans of Foreign Wars (1950)	180	22	104
20. American Liberty League (1936)	174	53	136
21. Christian Coalition (1996)	170	52	253
22. Association Against the Prohibition Amendment (1930)	168	56	37
23. Weathermen (1970)	159	22	92
24. Symbionese Liberation Army (1974)	157	23	97
25. Jewish Defense League (1971)	145	31	91

Note: CIO = Congress of Industrial Organizations; NAACP = National Association for the Advancement of Colored People.

THE STATE-RELATED CONSEQUENCES OF SOCIAL MOVEMENTS AND POLITICAL MEDIATION THEORY

MODERATE AND RADICAL INFLUENCE

A first step for scholars who seek to study state-related consequences of social movements is to define “success” or “influence” for challengers making state-related claims. We follow in the footsteps of most state-related research, focusing on new advantages (see Gamson [1975] 1990; Amenta and Caren 2004; Meyer 2005). But we reject Gamson’s ([1975] 1990) definition of “success”—whether a challenger’s claims were mainly acted on—because of its limitations. Challengers differ in how far-reaching their goals are, and thus a challenger may fail to achieve its stated program, but still win substantial new advantages for its constituents (Amenta and Young 1999). There are also the possibilities of negligible “successes,” such as a program that did not realize its intended

effects, and negative consequences, such as repression or restrictions on movements (Piven and Cloward 1977; McCarthy and McPhail 1998).

For these reasons, we employ a wider concept of influence based on collective goods, or group-wise advantages or disadvantages from which nonparticipants in a challenge cannot be easily excluded (Hardin 1982). Collective goods can be material, such as categorical social spending programs, but they can also be less tangible, such as new ways to refer to members of a group. Most state-related collective action in democratic political systems is aimed at major changes in policy and the bureaucratic enforcement and implementation of that policy (Amenta and Caren 2004). State social policies are institutionalized benefits that provide collective goods routinely to those meeting specified requirements (Skocpol and Amenta 1986). Once enacted and enforced with bureaucratic means, categorical social spending pro-

grams provide beneficiaries rights of entitlement. With bureaucratic reinforcement, an issue can become privileged in politics, biasing the political system in favor of the group. Benefits through legislation can range from structural benefits that extend the political leverage of a group, such as enhanced voting, associational, or civil rights, to one-shot pecuniary benefits, such as summer jobs, extensions of unemployment insurance, housing vouchers, or bonus payments. We argue that effecting more radical changes requires more extensive favorable conditions, both internal and external.

The old-age pension movement demanded generous and unrestricted grants to all nonemployed Americans over the age of 60 for their lifelong service to the country—or what it called “pensions” for “senior citizens.” Pension proponents in individual states demanded that OAA programs be converted into pension programs. Their demands were not met. Our focus, however, is on whether these groups had an impact on OAA, which permanently changed the relationship between the state and the aged. We also address whether the movement affected a Senate vote for a pension alternative to existing old-age programs. Finally, we estimate the conditions under which such radical action may have been possible.

POLITICAL MEDIATION THEORY

Many scholars have developed (Piven and Cloward 1977; Amenta et al. 1992; Skocpol 1992; Amenta et al. 1994; Fording 1997; Amenta et al. 1999; Lipset and Marks 2000) or tested (Cress and Snow 2000; Soule and Olzak 2004; Giugni 2004) political mediation models of social movement consequences. The basic idea is that challengers must engage in collective action that changes the calculations of relevant institutional political actors and thus mobilize and adopt strategies in ways that fit political circumstances. State actors must in turn see a challenger as potentially facilitating or disrupting their own goals—for example, augmenting or cementing electoral coalitions, gaining in public opinion, or increasing support for the mission of governmental bureaus. Political mediation theory rejects the idea that individual organizational forms, strategies, or political contexts will *always* influence challengers, as is generally argued (see Amenta and

Caren 2004 for review). Instead, the theory posits that different mobilizations and collective action strategies will be more productive in some political contexts than in others.

The most extensive versions of the political mediation theory (Amenta et al. 1999; Amenta forthcoming) build upon arguments that resource mobilization, strategies, and political context influence the consequences of movements. These versions argue that mobilizing relatively large numbers of committed people is probably necessary to winning new collective benefits for those otherwise underrepresented in politics (Rucht 1998; Skocpol 2003; see review in McCarthy and Zald 2002). In addition, making claims regarding the worthiness of the group (Tilly 1999b) and the plausibility of its program (Cress and Snow 2000; Ferree et al. 2002) is also necessary. Favorable political contexts, both long- and short-term, are also helpful (Jenkins and Perrow 1977; Kitschelt 1986; Kriesi 1995; Almeida and Stearns 1998; Meyer and Minkoff 2004). The political mediation model, however, helps to explain the impact of social movements by examining mobilization and strategies in combination with different sorts of political contexts. In highly favorable political contexts, all that should be required is a certain threshold of resource mobilization and minimally plausible and directed framing and claims-making. In less favorable political contexts, more assertive strategies of collective action would be required for a social movement to have influence. In yet other political contexts, where powerful systemic conditions work against challengers, it may be impossible for the challengers to exert much influence. In short, the context must be extremely favorable and the mobilization and action extensive for challengers to achieve the most radical goals.

ELABORATING THE THEORY

According to political mediation theory, the ability of a challenger to win collective benefits depends partly on conditions it can control, including its ability to mobilize, its goals and program, its form of organization, and its strategies for collective action, including issue framing and other claims-making. However, the impact of even well-mobilized challengers also depends on political context. Political mediation theory holds that political conditions influence

the *relationship* between a challenger's mobilization and collective action on the one hand, and policy outcomes on the other. It holds that mobilization and collective action alone are often insufficient to effect changes in public policy that would benefit a challenger's constituency. The model posits relationships between mobilization and strategies and structural and short-term political contexts. The argument focuses on specific political contexts, taking into account criticisms that political opportunity models are often conceptualized at too broad a level to be empirically tested (Goodwin and Jasper 1999; cf. Meyer and Minkoff 2004). Our political mediation argument also differs from political opportunity structure arguments (McAdam 1996; Tarrow 1996) in that the latter tend to address the mobilization of challengers than their political consequences (Zald 2000). Also, our understanding of political contexts is based not on standard political opportunity factors, but on contexts found influential in altering social policy (Mayhew 1986; Skocpol 1992; Amenta 1998; Hicks 1999; Huber and Stephens 2001).

The political mediation theory holds that specific long-term aspects of political and party systems influence the productivity of challengers' action. First, the degree to which formally democratic institutions are bound by democratic practices is key (Amenta 1998; Tilly 1999a). An extension of democratic rights entails lowering the legal restrictions on institutional political participation for the common citizens, including their ability to assemble and discuss issues. A highly democratized polity is also characterized by meaningful choices among parties or factions. By contrast, an underdemocratized polity is one in which political leaders are chosen by way of elections, but in which there are great restrictions on political participation, political assembly and discussion, voting, and choices among leadership groups. An underdemocratized political system greatly dampens the impact of the collective action of challengers, assuming they are able to arise in these polities. Underdemocratized political systems are characterized by noncompetitive elections and formal and informal restrictions on voting, such as poll taxes, extensive eligibility tests, harassment, and violence. The United States, especially the South, included many underdemocratized polities, as franchise barriers

were erected at the end of the nineteenth century and persisted through most of the twentieth century (Burnham 1974).

Second, patronage-oriented political parties—that is, autonomous, long-lasting, hierarchical organizations that seek to nominate candidates for a wide range of public offices and rely substantially on material incentives (Katznelson 1981; Mayhew 1986)—tend to deflect claims for collective benefits sought by pro-social spending challengers. Granting automatic and long-term entitlement claims to groups of citizens limits the sort of discretionary spending, such as for government jobs and contracts, that maintains a patronage-oriented political organization. For these reasons patronage-oriented parties regard social movement organizations as a menace and consider programmatic spending policies a threat to the individualistic rewards on which such parties thrive. Although it is not impossible for movements to exert influence under these circumstances, these structural impediments make it difficult, and also often thwart the efforts of state actors and insurgents in the party system to enact or enhance programmatic public spending policies in favor of challenging groups. The United States, especially in the Northeast and Midwest, was characterized by many patronage-oriented party systems for most of the twentieth century (Mayhew 1986).

Medium-range and short-term political contexts also influence the prospects of mobilized groups that hope to gain leverage in political systems that are mainly democratized and are not dominated by patronage-oriented parties. Domestic bureaucrats are key actors here. Bureaucrats whose mission is consistent with that of a challenger—assuming they have initiative, talent, and power—may provide administrative rulings, enforce laws, or propose new legislation that aids a challenger's constituency, even within the context of an otherwise indifferent or opposed state (Skocpol 1992). These domestic bureaucrats may advance such legislation further than they had intended if a challenger summons a show of strength. These arguments are similar to Kitschelt's (1986) about the role of implementation capacities. But our arguments are both wider, in considering the different ways in which domestic bureaucracies might amplify the impact of challengers' collective action, and more localized, as the rele-

vant bureaucracies will differ according to the challenger and its constituency. Bureaucracies centrally concerned with social and labor issues were inaugurated largely in the 1910s in the United States; they varied widely in their orientation and power in the 1930s, and continue to do so today.

Another crucial factor is the partisanship of the regime in power. A new political regime or government, hoping to add to its coalition, may aid the constituency of social movements by proposing spending or other legislation that favors a certain group. A regime that is favorable or open to the possibility of increased social spending would be expected to amplify the impact of a challenger's mobilization and collective action, while a regime opposed to social spending would dampen it. Often parties have long-standing commitments to ideological positions or groups whose interests and goals may conflict with those of challengers (Klandermans and Oegema 1987). For state-oriented challengers who seek collective benefits through sustained public spending, the position of the regime on higher taxation is crucial. Since the 1930s the U.S. Republican party and its representatives have tended to oppose automatic, programmatic spending claims because they imply higher taxation, whereas the national Democratic party and Democrats outside the South have tended to be "reform-oriented"—more open to policy claims requiring taxation (Amenta 1998; Hicks 1999). Regime conditions varied widely across the United States in the 1930s, as some northern states followed the national trend to elect pro-New Deal Democrats and others did not. Partisanship variations have persisted to this day, with the South having largely turned reliably Republican in the decades after the Civil Rights and Voting Rights Acts of the 1960s.

The mediation model expects these contexts to affect the influence of movement activity. If the political regime is open to the claims of challengers and the domestic bureaucrats are professionalized and favorably disposed to the challenger's constituency, limited activity on the part of the challenger, even simply providing evidence of mobilization, is likely to be sufficient to produce increased collective benefits. The challenger needs mainly to demonstrate that it has support, such as through writing letters, holding rallies, petitioning, initiating

public awareness campaigns, staging limited protest, or even engaging in visible internal events. Members of a reform-oriented regime are likely to use such evidence of mobilization as a confirmation of the beneficiary group's relative importance in an electoral coalition. If a reform-oriented regime has many issues on its agenda, it is more likely to address first the issues being pressed by mobilized groups. Domestic bureaucrats are likely to portray the mobilization as indicating the need for the augmentation or greater enforcement of its programs. If the regime hopes to add to its coalition or if domestic bureaucrats have a mission that is not yet realized, the best-mobilized groups are likely to win the greatest benefits in public policy for their constituencies.

By contrast, achieving collective benefits through public policy is likely to be more difficult if neither an open regime nor administrative authority exists. When the regime is opposed to the challenger or sees no benefit in adding the challenger's beneficiary group to its coalition and when state bureaucracies in the area are hostile, the sorts of limited protest listed above are likely to be ignored or to have a negligible effect. In the face of more difficult political circumstances, more assertive or bolder collective action is required to produce collective benefits. Here we drop the standard distinction between "disruptive" and "assimilative" (Kitschelt 1986) and "noninstitutional" and "institutional" (McAdam 1999) strategies, instead focusing on variations in assertiveness of action, with "assertive" meaning the use of increasingly strong political sanctions—those that threaten to increase or decrease the likelihood of political actors gaining or keeping something they see as valuable (their positions, acting in accordance with their beliefs) or to take over their functions or prerogatives. Sustained political action to unseat a representative, for example, would be more threatening than, say, dispatching protesters to picket or to occupy the representative's office. The institutional collective action of challengers works largely by mobilizing large numbers of people behind a course of action, often one with electoral implications. This collective action may be designed to convince the general public of the justice of the cause and influence elected and appointed officials in that manner, but it can also demonstrate to these officials that a large segment of

the electorate is willing to vote or engage in other political activity on the basis of a single key issue.

If the political regime is not supportive of the challenger's constituency or issue, collective action will be most productive if it focuses on elected officials. Such action might neutralize those who would otherwise be hostile to legislation and win the support of those who would be indifferent. Assertive action might include contesting elections, such as endorsing and supporting the opponents of hostile incumbents or winning promises from them and then providing support. Newcomers elected with a challenger's endorsement and support would be especially likely to support its program or other programs benefiting its constituents. Other assertive action would include attempting to override legislative authority, as through direct democratic devices such as the initiative, referendum, and recall. Such displays of influence might alter the views of legislators in whose states the mobilizations took place, even when the actions fail. In the face of strong electoral sanctions, legislators previously opposed may come to support moderate measures that benefit the group represented by the challenger.²

The mediation argument also addresses the characteristics of outcomes and legislation at issue. The more radical and far-reaching the outcome, the greater the favorable conditions required and the more the movement may have to do to influence it. Thus for some outcomes, such as improving existing programs, merely mobilizing under favorable contexts would be enough to exert influence. Similarly, employing assertive sanctions when conditions are structurally favorable but the short-term context is unfavorable may be enough. Fundamentally altering policy, however, is likely to take both strong mobilization and extensive assertive shows of strength. Even these may not be enough to create sweeping changes in policy; more favorable political conditions may also be necessary. The same is likely to be true for

bids to transform the structural position of groups, such as through new voting or civil rights.

To summarize, political mediation theory holds that the influence of mobilization and strategies of action are conditional on specific political contexts. Some systemic political contexts—an underdemocratized polity and a patronage-oriented party system—will deaden the influence of challengers. Medium-range and localized political contexts will have a more variegated effect on the relationship between a challenger's collective action and state-related results. Regimes and bureaucracies open to challengers' claims will tend to repay the challengers' mobilization. Even in democratized polities and non-patronage-oriented party systems, however, regimes and bureaucracies may still be unfavorable. In these circumstances social movements would need to engage in assertive collective action in order to win new benefits. Before we employ quantitative analyses to appraise the individual influence of various factors, and formal qualitative analyses to address the multiple theoretical interactions and causal pathways, we briefly introduce the old-age pension movement and U.S. old-age policy.

THE OLD-AGE PENSION MOVEMENT, U.S. OLD-AGE POLICY, AND OUR ANALYSES

THE TOWNSEND PLAN AND THE OLD-AGE PENSION MOVEMENT

The Townsend Plan 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 (Holtzman 1963; Mitchell 2000; Amenta forthcoming). The purpose of the organization was to promote the enactment of the pension-recovery program Townsend had first outlined in letters to the editor of the *Long Beach Press Telegram* in September 1933. The plan called for \$200 monthly pensions to all nonemployed citizens over 60 years, excluding criminals, and was designed to end the Depression and ensure prosperity through the mandatory spending of these pensions, as well as to end poverty among the elderly. Clements assembled a hierarchical organizing staff paid by commission, and Townsend was the organization's symbol and

² Assertive action directed at unfavorable bureaucracies is also expected to be more productive than mobilization and limited protest. Unfortunately, we were unable to gain systematic information across states regarding this sort of protest and so cannot test that part of the argument here.

spokesman, akin to the role that Colonel Sanders played for Kentucky Fried Chicken. To maintain enthusiasm and mobilize resources, Clements and Townsend inaugurated Townsend “clubs”—local affiliates with no formal decision-making powers, but that met regularly to hear speakers, collect donations, and act in political campaigns. The Townsend Plan grabbed national attention in late 1935 when it was organizing clubs at the rate of one every two hours. At that point, legislation it had endorsed would have provided almost all senior citizens with about \$60 per month, less than \$200 but far more than what was promised by the Social Security Act.

Although Townsend clubs and their members remained the backbone of the old-age pension movement, they were joined by a number of pension organizations later in the 1930s. A group known as Ham and Eggs won national attention in 1938 with its program to provide \$30 every Thursday to aged Californians. Other notable state-level pension organizations included the National Annuity League of Colorado and the Old Age Pension Union of Washington. In different states many coalitions formed briefly around specific initiatives, especially in 1938, when eight pension initiatives were placed on state ballots. For the most part, these initiatives concentrated on providing more generous benefits than existing programs, although the movement also stood for a wider extension of benefits to the aged. The pension movement existed for almost two decades under diverse national political circumstances and across state-level polities. The Townsend Plan chose to ignore the state level in the 1930s, arguing that improving OAA programs in individual states would hinder efforts to enact pensions at the national level. But the Townsend Plan, too, eventually began to demand changes in state old-age laws, placing propositions for \$60-per-month pensions on the ballots of a few western states in 1943. These efforts failed, and by 1950 the Townsend Plan had lost most of its membership.

U.S. OLD-AGE POLICY AND THE PRESENT RESEARCH

The 1935 Social Security Act created two old-age programs. One was a national, proto-old-age insurance program, which was not scheduled to make any payments until 1942. The second was a federal-state matching program called Old

Age Assistance, which immediately provided benefits to the aged in individual states. OAA was the workhorse of old-age protection during the Depression, the Second World War, and immediately afterward. It was upgraded in 1939 and was not eclipsed by Old Age and Survivors Insurance (known now as “Social Security”) until the 1950s. We ascertain first whether the old-age pension movement influenced OAA programs and, if so, in what ways and why. OAA programs are useful in a test of our arguments because the various state programs did not converge in their generosity and coverage, and the pension movement sought to convert them into pension-like programs with more generous benefits, often through initiatives. We would expect the pension movement to have greater influence on the generosity of programs than on the extension of programs.

We also seek to determine whether the pension movement induced senators to vote for a measure to replace the two programs with a senior citizens’ pension and, if so, what types of activities were effective, by analyzing roll-call votes (McAdam and Su 2002; Soule et al. 1999) through multiple regression analyses. We focus on 1939, the year that the Social Security Act was amended and the only year that there were votes on senior citizens’ pensions. The so-called Lee amendment (S76-1061), though not specifically a vote on authorized Townsend Plan legislation, would have created a widespread and generous \$40 per month benefit, twice as large as the average OAA payment. The \$40 figure was also the median amount that public opinion polls indicated that the government should pay in monthly old-age benefits (Gallup 1936, 1939). Although the amendment failed, by a vote of 17 to 56, putting on the Congressional agenda a radical alternative and lining up votes behind it (Kingdon 1984) is one way for a challenger to influence the political process and public policy, as it can induce opponents to accept more moderate legislation. Indeed, observers suggest that this is what happened in 1939 in the case of the pension movement (Huston 1939). The Lee amendment vote also gives us an opportunity to compare the determinants of influencing existing programs with those of altering policy in a more fundamental way. Because the Townsend Plan was mainly engaged at the national level and made plausi-

ble claims about pensions at the time, we expect it should be influential.

These state and national policy outcomes provide a large number of cases, making it possible to control for other variables that might also have influenced old-age policy-variables that are often ignored in studies of the impact of social movements (Earl 2000). Scholars of social policy argue that democratized political systems, left-wing regimes, powerful domestic bureaucracies, favorable public opinion, and economic and demographic developments might all influence the policy changes that others might attribute to the presence or activity of a social movement (Amenta, Bonastia, and Caren 2001; Skrentny 2002). Worse, some of these conditions, such as an increase in the aged or the rise to power of the Democratic party, may have spurred both the pension movement and political action on old-age benefits (Amenta and Young 1999). Our analyses address these issues.

EXPLAINING OLD AGE ASSISTANCE IN ITS FORMATIVE YEARS

DEPENDENT MEASURES

We examine two basic components of Old Age Assistance programs, their generosity and their coverage, from their first year in operation in 1936 through 1950, when the Social Security Act was amended to upgrade old-age insurance. The first dependent measure is the *average size of the OAA benefit*, an indication of the relative generosity of states. (For details on the construction and source of each dependent and independent measure, see Appendix.) In addition, we examine each state's *OAA coverage*—the state's commitment to providing assistance broadly to elderly residents. State legislation generally set the parameters controlling these programs. Benefit levels and coverage varied dramatically from state to state.

INDEPENDENT MEASURES AND EXPECTATIONS

We appraise the main social movement and political mediation arguments through a series of independent measures. Three capture different facets of the political institutional aspects of the mediation theory, and they vary little over time. As an indicator of voting rights and polity democratization, we consider the *poll tax*, a key, though far from the only, means to restrict

the franchise. Nine states had poll taxes at the start of the period, but Florida and Georgia dropped theirs. We expect that underdemocratized political systems, characterized by restrictions on the franchise, would discourage movements for generous public spending programs as well as OAA benefits and coverage. We also include a measure of *patronage party organizational strength*, with the expectation that such party organizations would discourage categorical public spending, resulting in less generous benefits and restricted coverage. We also include *administrative strength*, a measure of the strength and structure of the state labor commissions. Although they did not typically control OAA, their existence indicates overall domestic bureaucratic development and power, and we would expect them to have a positive influence on OAA outcomes.

Two measures address medium-term political and administrative conditions. We would expect that control of the state government by a pro-spending party would lead to higher quality OAA programs. We model *democratized Democratic control* by including a measure for control of the governor's mansion and both houses of the state legislature by the Democratic party in states without poll taxes. Additionally, we include a measure of *OAA county funding*. We expect that higher county contributions to OAA would negatively influence OAA outcomes, as counties had fewer and more contentious taxing opportunities, mainly real estate levies.

We also employ several control measures. *Per capita income* addresses how much social spending states could afford; we expect that higher per capita income would positively influence OAA (Wilensky 1975). We also include *percentage black* to take into account the potentially dampening impact of race on OAA benefits (Quadagno 1988; Lieberman 1998). *Percentage aged* in each state is likely to spur demands for old-age benefits (Mitchell 2000). We also include measures of *pro-old-age public opinion*. Public opinion is sometimes argued to be the only direct influence on public policy (Burstein 1999) and often is absent in empirical studies of movement consequences, possibly resulting in their models being misspecified and their conclusions faulty (Burstein and Linton 2002). We analyze two 1938 Gallup polls, the earliest polling efforts on old age that

survive in forms suitable for state-level analyses. We focus on the question “How much per month should be paid to a single person?” in our analyses of OAA generosity. The median choice was \$40. For OAA coverage, we examine the question “Do you think pensions should be given to all old people, or only to old people who are in need?” About 20 percent chose “all.” Responses are aggregated to the state level. Although there is no systematic information on the saliency of the issue, it is likely that old age was a prominent issue through 1941, when the Second World War began. We therefore include control measures for the war and postwar time periods.³

Finally, we consider three pension movement measures, Townsend club activity, change in club activity, and electoral initiatives. First, we operationalize *Townsend club activity*⁴ in two ways. Given the expectation that high mobilization will have a lasting influence (McCarthy and Zald 2002), we measure club activity at its

³ The first Gallup poll on old-age benefits was taken in 1935, but the data do not survive. Other data are often not usable, because Gallup’s questions were often poorly worded. From the first poll forward Gallup found that overwhelming percentages of Americans were in favor of government provided old-age “pensions,” a word used indiscriminately at the time to refer to all manner of aid to the aged (Schiltz 1971: chapter 2). Gallup occasionally asked respondents about the saliency of issues, but they were usually asked to volunteer answers, resulting in numbers too small to aggregate to the state level (see Weakliem 2003) even if they had survived. For comprehensive listings of the results of polls on old age, see Cantril and Strunk (1951:541–46) and Schiltz (1971).

⁴ Note that we cannot, unfortunately, appraise arguments about the strategic capacities (Ganz 2000) and movement infrastructures of challengers (Andrews 2001), as these did not vary greatly for the Townsend Plan, and it is difficult to get information by state and year for other old-age campaigns. For the most part, the Townsend Plan would have to be considered high on strategic capacities and infrastructural resources. It also had an innovative form of organization, combining aspects of real estate sales organizations and fraternal organizations in a social movement organization. To the extent that the Townsend Plan mobilization influenced policy it can be considered a supportive result for these perspectives.

peak value for a state. Second, we measure the *change in activity*, which has been argued to be more likely than the overall mobilization level to influence politicians who are seeking information relevant to their reelections (Burststein and Linton 2002). We also include a measure for the most assertive movement strategy to influence state legislators—the placing of *pension propositions* on the ballot. These propositions were usually designed to make OAA more generous, and less frequently to relax eligibility requirements. While the vast majority of these efforts failed, and the successes were countered by subsequent legislation, we expect that propositions would have a positive impact on OAA generosity. Propositions usually involve a political show of force: their proponents petition, dramatize an issue, and insert it onto the political agenda. In this instance, we expect that they would pressure politicians to prove their commitment to their aged constituents.

Although it is not possible to test all the interactions in the political mediation argument with multiple regression, the model does provide different expectations across the independent measures and across time. First, we expect the long-term institutional factors to influence both aspects of OAA, as these are general influences on social policy. But we also expect the social movement measures to have a greater influence on the average benefit than in coverage, because the claims and demands of the pension movement were largely focused on higher benefits.

MULTIPLE REGRESSION RESULTS

Our cross-sectional panel data set includes information on the 48 states, each over a period of 14 years. Under these circumstances, with multiple cases from the same state and multiple cases from the same year, we expect that the error terms would not be independent and identically distributed, making pooled OLS regression inappropriate. Moreover, our data set is case dominated, with many more cross-sectional cases than years, rather than temporarily dominated, as is typical in time-series cross-sectional research (Beck 2001). For these reasons we employ a GLS random-effects model, which allows for both time-varying and time-invariant variables (Western and Beckett 1999; Kenworthy 2002; Beckfield 2003). Additionally, we expect that spending by a state in a given year

will be related to its spending in the previous year, potentially producing serially correlated errors. The Wooldridge (2002) test for autocorrelation in panel data reports significant evidence of first-order autocorrelation in our models, and we employ the Baltagi-Wu (1999) estimator to remove this disturbance. For the average size of OAA benefits and coverage, we report an initial model estimating the effects of political contextual factors and control measures, and then a full model that adds social movement measures in order to ascertain whether they add to the explanation.⁵

Table 2 presents the results for the average size of OAA benefit. The initial model, Model 1, yields significant coefficients at the .05 level or better for the political context measures, with the exception of democratized Democratic control. All the control measures, except for the war period, are significant. The full model, Model 2, which accounts for almost 70 percent of the overall variance, yields positive and significant coefficients for Townsend club peak-level measure at the .05 level and the proposition measure at the .10 level. Moving up a level in Townsend club mobilization is worth \$1.23 per month, and placing a proposition on the ballot is worth about \$1.37 per month. Both are substantial gains since the average payment in 1950 dollars across the entire period was about \$37 per month. In Model 2, moreover, administrative strength and OAA county funding remain significant at the .05 level, and the poll tax measure is significant at the .10 level. States with a poll tax spent approximately \$3.90 less per month on OAA, while those with a tradition of domestic administrative development spent about \$3.88 more per month, after controlling for other factors. The public opinion measure also remains significant and substantial. A declaration of an additional dollar for the appro-

priate amount of stipend was worth 30 cents. However, when we substitute the measure of change in Townsend activity for the peak value of Townsend activity, the measure is insignificant. This suggests that policy-makers are not responding to new information about the challenger. In addition, the coefficient for the World War II period was positive, which is counter to expectations given the drop in attention to domestic issues, though it falls short of significance.

Table 2 also presents the results for an initial and full model on OAA coverage in Models 3 and 4, respectively. Patronage party strength, democratized Democratic control, and OAA county funding are significant at the .01 level in Model 3. States with Democratic control cover approximately 3.3 percentage points more of their elderly population, and moving up one level in Mayhew's five-level measure of patronage party strength diminishes coverage by 2.9 percentage points. Moving up 10 percentage points in public opinion to cover all the aged meant an increase of one percentage point in coverage. These were substantial influences, as the average coverage across all states and time periods was about 22 percent. Among the other control measures, the coefficient for percentage aged is significant and negative, whereas the war and postwar period coefficients are both significant and positive. The war did not lead to the reduction of coverage—just the opposite. The coefficients for race and income are in the expected directions, but insignificant. Model 4 explains 30 percent of the overall variance. However, neither of the social movement measures, when added, has a significant impact on spending coverage.

In summary, structural and short-term political contextual factors strongly affected both OAA measures, and in the predicted directions, although each measure was not significant in all models. Among the control measures, public opinion influenced both outcomes. The findings for the social movement measures were mixed. Townsend club activity and propositions significantly and substantively influenced the average monthly old-age stipend, but they did not influence coverage under OAA. These results, however, fit with political mediation expectations, as the pension movement's claims and collective action were focused largely on the size

⁵ For the full models, the Hausman specification test indicated that the efficient random effects model was not significantly different from the consistent fixed effects model, and we performed a Ramsey regression specification error test (RESET) for omitted variables for each year. The results (not shown, but available on request) were significant for only one year, which is additional evidence for the suitability of the random effects model.

Table 2. Average Size of the Old Age Assistance Benefit and OAA Coverage on Selected Independent Measures

	Benefit Size		Coverage	
	Model 1	Model 2	Model 3	Model 4
<i>Institutional Measures</i>				
Poll Tax	-4.584* (1.88)	-3.897 (1.61)	-3.183 (1.18)	-3.100 (1.14)
Patronage Party Strength	-1.220** (2.50)	-0.871* (1.74)	-2.880** (4.65)	-2.858** (4.45)
Administrative Strength	3.918* (2.15)	3.879* (2.19)	-0.941 (0.44)	-0.974 (0.46)
Democratized Dem. Control	-0.067 (0.07)	0.299 (0.30)	3.265** (3.34)	3.315** (3.33)
OAA County Funding	-0.104* (1.96)	-0.090* (1.70)	-0.123** (2.34)	-0.123** (2.33)
<i>Movement Measures</i>				
Townsend Club Activity	—	1.229* (2.15)	—	0.075 (0.12)
Pension Proposition	—	1.374 (1.44)	—	0.625 (0.74)
<i>Control Measures</i>				
Pro-Old-Age Public Opinion	0.306** (3.81)	0.300** (3.83)	0.100 (1.32)	0.097 (1.27)
Per Capita Income	0.007** (4.86)	0.007** (5.10)	0.001 (0.66)	0.001 (0.71)
Percentage Aged	1.347** (3.70)	1.323** (3.66)	-0.957* (2.46)	-0.946* (2.42)
Percentage Black	0.188* (2.11)	0.119 (1.29)	-0.067 (0.65)	-0.061 (0.55)
War Period	0.971 (1.30)	0.557 (0.73)	2.262** (3.16)	2.219** (3.03)
Postwar Period	4.862** (4.93)	4.354** (4.35)	1.870 (1.94)	1.788 (1.82)
Constant	5.184 (1.08)	-0.781 (0.14)	32.778** (7.97)	32.288** (6.54)
Observations	672	672	672	672
Number of states	48	48	48	48
R ²	0.69	0.70	0.30	0.31
χ ²	410.83**	427.25**	59.51**	60.14**
Df	12	14	12	14

Notes: Data shown are unstandardized coefficients from random effects regressions. The absolute values of z statistics are in parentheses. For definitions of measures, see text and Appendix.

* $p < .05$; ** $p < .01$ (one-tailed; except for percent aged, war period, and postwar period).

of the benefit rather than coverage, and thus we would expect a differential influence.

QUALITATIVE COMPARATIVE ANALYSES

The expectations of the political mediation model are combinational, and these sorts of arguments can often be better assessed using FSQCA, for which multicollinearity is not problematic (see Ragin 1987, 2000). Here we employ

crisp rather than fuzzy sets, as most of the independent measures are nominal. We located 13 states with GENEROUS OAA benefits.⁶ (In

⁶ To determine which states provided generous OAA benefits, we average the residuals of a baseline modeling, including only per capita income and percentage aged for each state across our entire time period. We designate the 13 states that had an observed

FSQCA notation, a measure written with all capital letters denotes its presence, while one written in all lowercase denotes its absence.) Two of the institutional political measures are nominal. States that employed a poll tax during this period are designated POLLTAX. Those where the state's labor commissioner had rule-making authority over safety laws throughout the period are labeled ADMIN. States that were largely controlled by PATRONAGE party organizations are those that score either of the top two values on Mayhew's (1986) scale. States where the Democratic party controlled the governor's mansion and both houses of the legislature for at least 40 percent of the time are considered DEMOCRATIC. As for social movement measures, states that had reached the highest level of Townsend club presence at any time are considered highly MOBILIZED, and states where the pension movement placed one or more propositions on the ballot are said to have had ASSERTIVE collective action.

We begin by comparing the theoretical expectations of the political mediation model with those configurations standard in the social policy literature. The configurational theoretical expectations from the institutional politics model of social policy (Amenta and Halfmann 2000) 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. By contrast, the political mediation argument suggests that the mobilization and collective action of challengers can also spur policy, according to the following expression:

polltax*patronage*(MOBILIZED*
(DEMOCRAT+ADMIN) + ASSERTIVE).

This means that in structurally conducive and politically favorable short-term situations, only challenger mobilization is needed to produce collective benefits. When short-term political conditions are less favorable, more assertive action is the best strategy. This type of activity is sufficient to bring results.

While there are 64 theoretically possible combinations of the six dichotomous independent variables, only 21 combinations describe the experiences of the 48 states during this period. The results indicate that six of the combinations consist of states that always exhibited generous stipends.⁷ (See Table 3.) The six expressions in Table 3 account for 11 of the 13 positive cases. These reduce to three that encompass each of the successful cases and can be combined in one expression (see Table 3). Necessary conditions for high OAA benefits were the absence of poll taxes and patronage parties. However, other conditions also had to be present to account for high OAA benefits: administrative powers and Democratic party control; Democratic party control and mobilization; or assertive collective action alone.

These results have implications for both the standard institutional political model and the political mediation model. First, as expected by both models, democratic rights and the absence of dominant patronage parties are necessary for high OAA spending. This suggests that under some structural, systemic conditions the activity of both institutional political actors and social movements are likely to be thwarted. In political situations where it is possible to promote policy, the predictions of the standard institutional model and the political mediation model are all borne out. The standard institutional model holds that in favorable systemic political circumstances, a favorable regime and administrative powers would be likely to produce generous social policy. One

value that was 10 percent larger than the predicted value, where there was a large break in the data, as generous spenders. The 10 states where the observed value is greater than predicted but less than 10 percent higher are coded as intermediate or "don't care" cases, and the 25 remaining states are coded as zeros.

⁷ Contradictory combinations mainly consisted of failures and are treated as such.

Table 3. Six-Measure FSQCA Results for Generous OAA Benefits

Individual Configurations (and numbers of states)
polltax * patronage * ADMIN * democrat * MOBILIZATION * ASSERTIVE (5) +
polltax * patronage * ADMIN * DEMOCRAT * MOBILIZATION * ASSERTIVE (2) +
polltax * patronage * admin * DEMOCRAT * MOBILIZATION * assertive (1) +
polltax * patronage * ADMIN * DEMOCRAT * mobilization * assertive (1) +
polltax * patronage * ADMIN * democrat * mobilization * ASSERTIVE (1) +
polltax * patronage * admin * DEMOCRAT * mobilization * ASSERTIVE (1)
Reduced Forms of Configurations
polltax * patronage * ADMIN * DEMOCRAT +
polltax * patronage DEMOCRAT * MOBILIZATION +
polltax * patronage * ASSERTIVE
polltax * patronage * (DEMOCRAT * (ADMIN + MOBILIZATION) + ASSERTIVE)

Note: For FSQCA notation and definitions of measures, see text and Appendix.

of the reduced combinations indicates precisely that.

The results also provide strong support for the mediation model. Two of the hypothesized combinations expected to lead to generous OAA benefits are present. As before, only under some long-term political contextual conditions is movement influence possible. Necessary conditions for influence include the absence of both poll taxes and dominant patronage parties. Under these circumstances and a favorable short-term political circumstance, the Democratic party holding power, only extensive movement mobilization is necessary to bring about high OAA benefits, and together they are sufficient. When there are no medium- or short-term conditions in favor, neither a long-standing domestic administrative tradition nor a Democratic regime in power, assertive action is sufficient to produce high OAA benefits.

WHO VOTED FOR SENIOR CITIZENS' PENSIONS IN 1939?

Next we turn to the Senate vote on an old-age pension measure, the proposed Lee amendment to the Social Security Act Amendments of 1939. Lee's amendment would have provided pensions of \$40 per month to all aged Americans and would have replaced existing old-age programs. Though not specifically a vote on Townsend Plan-sponsored legislation, the Lee amendment would have provided a generous, widespread, nationally financed pension, which was the hallmark of Townsend's proposal. Funding these pensions was a more

radical outcome and one demanded by the pension movement. The amendment failed, 17–56. But forming a coalition behind a radical alternative is a way to induce legislators to support more moderate legislation that they might not otherwise have favored. We analyze the vote for the Lee amendment both by logistic regression and FSQCA techniques. The latter are important because the mediation theory expects that many favorable circumstances are necessary to influence this sort of radical outcome.

For the regression analyses, we use many of the previous independent measures, adjusted for the year. For partisanship, however, we employ the party affiliation of the senator, noting whether he or she was a non-poll tax Democrat or a member of a radical third party. Public opinion in these models is measured by the state-level support expressed in a December 1938 Gallup poll for the so-called Lodge bill. That proposal would have provided for \$60 monthly pensions for almost all aged Americans, with \$40 being provided by the federal government. About 65 percent of those expressing an opinion were in favor. We also employ a measure of whether the senator was endorsed by the Townsend Plan, which urged clubs to support those whom it endorsed. The pension measure may be more valid than the endorsement measure, as only a third of the senators came up for election in 1938. Because of the smaller number and the different nature of the cases, we use a modified version of the model to explain OAA outcomes. In the first model, we include the poll tax and patronage party measures, as well as the partisanship measure. We also include the control measures

for income, percentage aged, and public opinion.⁸ In a second model, we add the three movement measures to see if they add anything to the explanation.

Table 4 shows two logistical regression models of the vote in favor of the radical Lee amendment. Model 1, including all the non-movement-related measures, explains about 20 percent of the variance and correctly predicts about 78 percent of the cases. Two of the political contextual measures are significant and in the proper direction, with a negative influence of dominant patronage parties and a positive influence of democratized Democratic or third party affiliation on the odds of voting for senior citizens' pensions. The control measure public opinion in favor of the Lodge bill has a positive effect, significant at the .10 level, whereas the control percent aged has a negative effect.

Model 2 provides a significant improvement of fit. The pseudo R-squared jumps from about .20 to about .40, and the increase in predictive power is from about 78 percent to about 84 percent, which is a shift from predicting 57 of 73 cases correctly to 61—or a quarter of the remaining cases. Townsend club strength significantly increases the likelihood of a senator's voting for the bill. So does a pension initiative, though at only the .10 level. Having a pension initiative in a state makes a senator almost three times more likely to vote for the Lee amendment, from about 9 percent to about 25 percent. The Townsend endorsement has a positive, but insignificant, effect, possibly because only one third of senators were subject to being endorsed. The measure of patronage party strength becomes insignificant, perhaps because it was exerting influence by dampening the pension movement. Also, in the final model the measure of public opinion is significant at the .05 level and substantively important. A movement from 60 percent of the public supporting the Lodge bill to 80 percent would increase a senator's chance of vot-

ing for the Lee amendment from about 7 percent to about 25 percent.⁹

We now turn to examining combinations of conditions leading to positive votes through FSQCA. Again, because most of the independent measures are categorical, as is the dependent measure, we employ crisp-set analyses. We score those in favor as one, and those opposed as zero, and begin our analyses with the same independent measures as before, though this time we include whether the senator had a Democratic or radical third party affiliation (DEM/THIRD) and omit the administrative variable, which is not applicable nationally. Although the mobilization measure is the same, we combine the measure of initiatives and endorsements (ASSERTIVE), treating these statewide assertive activities as functionally equivalent, to reduce the complexity in the results. Our expectations here are that it may take both high mobilization and assertive action in the most favorable possible contexts to reach this more radical result. Because of the low percentage of positive votes, almost all truth table combinations that include positive votes are "contradictory," including one or more negative votes. Because we are interested in understanding the conditions under which it is reasonably likely for a senator to vote for a radical program, we reduce combinations in which at least half of the senators supported the pension amendment.

Three combinations provide the greatest support for the amendment:

polltax*patronage*DEM/THIRD*
 MOBILIZATION*ASSERTIVE +
 polltax*PATRONAGE*DEM/THIRD*
 MOBILIZATION*assertive +
 polltax*patronage*dem/third*
 mobilization*ASSERTIVE

⁸ We also included a control for union density—union members in 1939 as a share of the nonagricultural employed (see Amenta and Halfmann 2000)—because it is often argued that unions spur old-age programs. This measure proved to be insignificant in our model (results not shown, but available on request), and we omitted it.

⁹ We also engaged in a similar logistical regression analysis of voting for the Townsend Plan bill, HR 6466, in the House of Representatives that year. HR 6466 also called for senior citizens' pensions for the nonemployed who were over 60 years old, based on a transactions (sales) tax and other taxes, and was expected to produce initial benefits of about \$60 per month. The bill failed, 306–101. We did not report these results (available upon request) mainly because they largely replicate the Senate results.

Table 4. Voting for the Radical Lee Pension Amendment on Selected Independent Measures

	Model 1	Model 2
<i>Institutional Measures</i>		
Poll Tax	0.196 (0.13)	4.602 (1.85)
Patronage Party Strength	-0.477* (1.92)	0.212 (0.57)
Non-Poll-Tax Democrat or Third Party Member	1.464 (1.56)	3.220* (2.11)
<i>Movement Measures</i>		
Townsend Club Activity	—	1.279* (2.28)
Pension Proposition	—	2.018 (1.64)
Townsend Endorsement	—	1.035 (0.83)
<i>Control Measures</i>		
Pro-Old-Age Public Opinion	0.045 (1.61)	0.079* (2.09)
Per Capita Income	-0.001 (0.37)	-0.001 (0.41)
Percentage Aged	-0.428 (1.69)	-1.255* (2.48)
Constant	-1.606 (0.54)	-7.966 (1.92)
Observations	73	73
Pseudo R ²	0.20	0.41
χ^2	15.97*	32.24**
Df	6	9

Notes: Data shown are unstandardized coefficients from logistical regressions. The absolute values of z statistics are in parentheses. For definitions of measures, see text and Appendix.

* $p < .05$; ** $p < .01$ (one-tailed; except for percent aged).

As before, a lack of voting restrictions is a necessary condition. The first combination, which provides the most positive votes, six, is also the one closely associated with political mediation thinking. It includes all possible favorable conditions: a Democratic or third party affiliation, a strongly mobilized pension movement, and assertive action. The second combination suggests that high mobilization alone in an already favorable political context can be influential. The third indicates that assertive action will provide an alternative means of exerting influence in less favorable situations. However, the last two combinations help to identify only three additional senators voting for pensions. The results support political mediation thinking, but also suggest that yet other factors than those in this version of the model may be needed to identi-

fy legislators most willing to support the programs of state-oriented movements.

CONCLUSION

To summarize, our main claim is that the collective action of state-oriented challengers and their influence on public policy is politically mediated in specific ways. Challengers control their strategies and, to be effective, must be able to alter them according to political contexts. Under certain political institutional conditions, notably restrictions on democratic practices and the entrenchment of patronage-oriented political parties, the impact of state-oriented challengers is likely to be greatly dampened. In the first half of the twentieth century, only about half of the state-level U.S. politics were structural-

ly open to influence. Under these open conditions and more favorable conditions over the medium and short term, little more than mobilization is needed for social movements to have influence, whereas in less short-term politically favorable conditions more assertive action is necessary. Like scholars of framing, we argue that the influence of a challenger is likely to be confined to the issues that it plausibly engages. To achieve radical results, the most favorable conditions, mobilization, and assertive action are required.

The results on the development of Old Age Assistance and on the Senate vote bear out these claims. All sets of results also provide some support for the views that high mobilization is a key to influence and that strategies matter. In addition, Townsend club activity seemed to have a continuing influence on OAA generosity, whereas changes in activity did not seem to influence policy-makers similarly. This suggests that organization and mobilization may pay longer-term dividends for challengers, though perhaps only so long as the movement as a whole remains viable. Assertive strategies also influenced old-age policy. Pension initiatives had a significant influence on OAA stipends. The results also suggest that the standard distinction between institutional and non-institutional and disruptive and assimilative action is too broad to address the sorts of collective action that matter in political processes. Also, the fact that the pension movement largely concerned itself with high benefits led to a differential influence on OAA generosity and coverage, with the movement spurring benefit levels, but not coverage. These results suggest that movement claims-making can limit the influence of challengers and that being flexible in this area may make wider benefits possible for a movement's constituency.

The formal qualitative results also support the mediation idea: that challengers need to match collective action strategies to political contexts. Combinations of conditions associated with high OAA pensions were as expected by the political mediation model. One of three combinations included a Democratic regime and Townsend club mobilization, suggesting that under short-term favorable circumstances, mobilization was sufficient to bring gains in OAA spending. Another combination indicated that when short-term political conditions were

not necessarily favorable, the aggressive strategy of initiatives proved sufficient to bring about high OAA benefits. On the vote to transform old-age policy, movement mobilization and assertive action under favorable conditions brought positive results.

Our research should not be interpreted to mean that this or that variable should be expected always to bring influence for challengers or to mean that social movements are usually likely to produce policy results. Our point is simply that social movements can be influential under certain conditions. It seems likely that most movement organizations are not likely to be highly influential, given that challengers start from a position of relative disadvantage in political power. The pension movement included a fairly powerfully organized and mobilized set of challengers with widespread support, and the old-age issue was a prominent one in the 1930s and 1940s. The results we report here may pertain only to the most significant and highly publicized movements. That said, there is no reason to believe that policy results of the sort that we find would be confined to a movement based significantly on one large challenging organization like the Townsend Plan. Decentralized challengers and coalition-based movements combining the same characteristics might achieve similar sorts of results.

The results also support the view that public opinion influences public policy and movements can have a further indirect impact on policy by influencing the general public about its mission, program, or constituency. However, the strong version of the public opinion argument finds little support. Adding public opinion measures did not mean that other causes faded into insignificance. Although data limitations made it impossible to appraise directly the influence of the relative saliency of public opinion, the old-age issue had a high profile in the late 1930s, and its saliency was due at least in part to the pension movement. The Gallup polls taken in late 1935 and early 1936 were largely a result of the rise of the Townsend Plan, and the polls taken in 1938 and 1939 were in a response to a resurgent pension movement (Amenta forthcoming). The results here also line up with the idea that the influence of opinion polls on political actors may be historically variable and requires explanation in itself. We hope that promising ideas about the contingent

impact of public opinion on policy (Jacobs and Shapiro 2000; Burstein and Linton 2002; Manza and Cook 2002) are set out more explicitly and empirically examined. Scholars of the impact of social movements may need to model the influence of challengers on opinion and from there on state outcomes.

As the results show, the political mediation model, as currently constructed, seems only partially adequate to understanding the more radical and difficult-to-achieve outcomes for social movements. Favorable shifts in public opinion (Burstein 1999; Giugni 2004) or innovative framing (Cress and Snow 2000) or gaining ground in discursive struggles through the mass media (Ferree et al. 2002) may be required in addition to factors identified by the political mediation theory to achieve fundamental changes demanded by challengers.

Also, as studies mount, both from social movement scholars and political sociologists examining state policy, the impact of movements on policy seems to be understood at least as well as the determinants of mobilization, which seem considerably more controversial (cf. Goodwin and Jasper 1999; McAdam 1999; Ferree and Merrill 2004; Meyer 2004). It is no longer enough for students of the policy consequences of movements to justify their research as being on a novel subject. What we need are theoretical refinements and advancements of more complex ideas and the types of investigations, whether quantitative, formal qualitative, or historical, that can enable us to appraise theory and further our understanding of the influence of movements on political outcomes. We also need to address whether political mediation ideas are applicable or whether completely new theorizing is needed to understand the many attempts at influence by movements that are not mainly directed at the state (Amenta and Young 1999; Earl 2004).

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APPENDIX

DEFINITIONS, DATA, SOURCES, AND QUANTITATIVE MEASURES

DEPENDENT MEASURES

Average Size of the OAA Benefit

The average OAA benefit in each state for each year in 1950 dollars (U.S. Social Security Board/Administration 1935–1950; U.S. Bureau of Labor Statistics 2004).

OAA Coverage

The percentage of each state's residents over the age of 65 years (Gardner and Cohen 1992) who received OAA benefits in a given year (U.S. Social Security Board/Administration 1935–1950).

Radical Lee Pension Amendment

The roll call of the Senate vote S76-1061, the Lee amendment to the 1939 Social Security Act Amendments (Rosenthal and Poole 2000): one for each senator in favor, zero for opposed, and others excluded from the analysis.

INDEPENDENT MEASURES

Poll Tax

A dichotomous measure that takes a value of one for a period when states had a poll tax and zero for a period without a poll tax (Ogden 1958).

Patronage Party Organizational Strength

A time-invariant expert-judgment measure of the degree to which each state's political parties had substantial autonomy, were long-lasting and hierarchical, regularly attempted to nominate candidates, and relied on material incentives to engage people to do organizational work, ranging from five in states where patronage party organizations predominated to one in states where party organizations had little control (Mayhew 1986).

Administrative Strength

A time-invariant and dichotomous measure of the strength and structure of the state government that takes a value of one for states

where the labor commissioner had rule-making authority over safety laws and zero where the commissioner did not (Brandeis 1935).

Democratized Democratic Control

A dichotomous measure for control in each year of the governor's mansion and both houses of the state legislature by the Democratic party (Burnham 1992) in non-poll-tax states (Ogden 1958).

Non-Poll-Tax Democrat or Member of Radical Third Party

A measure scoring one for senators from non-poll-tax states (Ogden 1958) and Democrats or members of a third party (Rosenthal and Poole 2000) with others scoring zero.

OAA County Funding

The percentage of total OAA funding counties contributed in states by year (U.S. Social Security Board/Administration 1935–1950; U.S. Social Security Board 1945).

Per Capita Income

State income per person in each year, measured in 1950 dollars (U.S. Bureau of Economic Analysis 2001).

Percentage Black

The percentage of state residents who are African American in each year, based on the decennial censuses in 1930, 1940, and 1950 (Gardner and Cohen 1992), with values for intercensal years computed based on a linear growth for each state.

Percentage Aged

The percentage of state residents over 65 years of age in each year based on the decennial censuses in 1930, 1940, and 1950 (Gardner and Cohen 1992), with values for intercensal years computed based on a linear growth for each state.

Pro-Old-Age Public Opinion

Three measures from Gallup polls in 1938 in which individual responses to the following questions were aggregated to provide state-level estimates. Open-ended answers to “How much per month should be paid to a single person?” are averaged in our analyses of OAA generosity (American Institute of Public Opinion 1938a). For coverage, we compute the percentage of respondents who answered “All” to the question “Do you think pensions should be given to all old people, or only to old people who are in need?” (American Institute of Public Opinion 1938b). For the Lee vote, we compute

the percentage of respondents in favor of the Lodge bill, which would have established a national \$60 per month pension, with \$40 coming from federal funds (American Institute of Public Opinion 1938b).

Townsend Club Activity

A measure of mobilization based on a content analysis of a sample of eight issues of the Townsend Weekly by year, according to mentions of Townsend club activity by state, adjusted by yearly national membership (Holtzman 1963), ranging from one to five, with five indicating a level of activity that would place it in the top 20 percent of all state-years during this period. Club activity is measured in two ways: frozen at its peak value once reached, and according to the change in activity between years.

Townsend Endorsement

A dichotomous measure scoring one for senators endorsed by the Townsend Plan in the 1938 Senate election (Townsend National Weekly 1938), with others scored zero.

Pension Proposition

A dichotomous measure of the presence in a given state and year of a ballot proposition or initiative designed to increase pension amounts, coverage, or both, constructed from contemporary accounts in the *New York Times*, the *Washington Post*, the *Los Angeles Times*, and the *Christian Science Monitor*.

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