What Drives Progressive Policy? Institutional Politics, Political Mediation, Policy Feedbacks, and Early U.S. Old-Age Policy[1]

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What drives progressive public policy? Because progressive policy challenges the interests of powerful people and interests that dominate policy making, it is puzzling that progressive policy ever happens. This article addresses this question by modeling and appraising institutional political, political mediation, and policy feedback theories and models of progressive policy making. Institutional political theory focuses on political institutional conditions, bureaucratic development, election results, and public opinion. Political mediation theory holds that social movements can have influence over progressive policy under favorable political conditions. Policy feedback theory holds that programs will be self-reinforcing under certain conditions. The article goes beyond previous research by including and analyzing public opinion in institutional political and political mediation models and addressing positive policy feedbacks. We appraise five models derived from these three theories through fuzzy set qualitative comparative analyses of the generosity of early old-age policy across U.S. states at two key moments. We find some support for each theory, and the results suggest that they are complementary. Left regimes or social movements can initiate progressive policy, which can be reinforced for the long term through positive policy feedback mechanisms. We discuss the implications for current U.S. politics and for progressive policy elsewhere.

KEYWORDS: policy feedback; political mediation; political sociology; public opinion; social movements; social policy.

INTRODUCTION

What drives progressive policy? Progressive policies are lines of state action that aid disadvantaged groups, promoting their equality and increasing fairness. These policies typically come at the expense of more powerful groups and include notably those that promote civil rights (Fetner 2008; Htun and Weldon 2012; McAdam 1999) and provide economic security and reduce poverty (Hicks 1999; Huber and Stephens 2001; Piven and Cloward 1977; Skocpol 1992). Progressive policies are typically opposed by business and other powerful organized interests, as they require higher taxation or greater regulation, or both (Amenta 1998). The fact that progressive policies ever happen at all is puzzling given that powerful interests typically win in policy battles (Gilens and Page 2014; Hacker and Pierson 2011) and have reasons to oppose progressive policies.

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We identify and model three main theories of progressive policy making. Institutional politics theory holds that the determinants of progressive policy depend on processes inside political institutions and focus on the causal roles of democratization, capable domestic bureaucracies, and left governments or changing public opinion to effect policy (Burstein 2003; Hicks 1999; Huber and Stephens 2001; Manza and Cook 2002; Mayhew 1986; Orloff 1993). A second main theory of progressive political change centers on the outside influence of social movements (Andrews 2004; Banaszak 1996; Htun and Weldon 2012; Luders 2010; McAdam 1999; Piven and Cloward 1977; review in Amenta et al. 2010). "Political mediation" models (Amenta 2006; Giugni 2007) notably hold that the influence of movement action is contingent on specific political contexts and highlight the influence of action beyond protest that directly contests institutional politics. Third, policy feedback theory addresses the conditions for a policy's continuance. The positive policy feedback model specifically holds that progressive initial policies will tend to persist but only under certain conditions, including administrative backing and organized beneficiaries (Béland 2007; Pierson 2000), whereas some programs have negative feedback features (Weaver 2010). We address the question and appraise the models by analyzing old-age benefits in their formative years in U.S. states—which have served as empirical proving grounds for theories of policy making (Hicks, Friedland, and Johnson 1978; Plotnik and Winters 1985). In this period of depression and war, U.S. social policy was dramatically upgraded, especially old-age assistance programs, which were the most fiscally influential programs of the 1935 Social Security Act and hotly contested politically, with increases in generosity strongly opposed by conservative groups (Amenta 2006; Katznelson 2013).

We go beyond previous research in several key ways. First, we address progressive policy as a specific type that may have determinants different from those of the majority of public policies that may not draw extensive and powerful opposition. Moreover, we model and appraise three theories, combining theory and methods in new ways. We also explore the determinants of regressive policy, which may not be driven by processes parallel to progressive ones. Finally, we appraise the models using fuzzy-set qualitative comparative analyses (fsQCA), rather than crisp-set analyses, as in previous research. QCA can address arguments that are multicausal and nonsymmetrical (Ragin 2008) and posit multiple causal routes (Mahoney and Goertz 2006), but fuzzy sets retain greater information and provide better alignment between concepts and measures than the crisp-set analyses (Ragin 2008) employed previously (Amenta, Caren, and Olasky 2005). All in all, the results suggest that the three models are complementary rather than alternatives and may inform our understanding of future progressive policy making.

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

One of the greatest moments in U.S. progressive policy came in the mid-1930s, when midterm congressional elections in 1934 swept northern Democrats into power, after the landslide election of Democrat Franklin Roosevelt in 1932 (Hicks

1999; Mann 2012). In 1935, Congress passed the Social Security Act, which among other things created two old-age programs. Old Age Assistance (OAA), a federal-state matching program, immediately provided benefits to the elderly; all states adopted old-age assistance legislation by 1937, and many states passed generous pensions. OAA was the fiscally most important old-age program in the 1940s and was not eclipsed by Old Age Insurance, later known as Social Security, until the 1950s (Amenta 2006).

These reforms also occurred in the context of extensive activity by the old-age pension movement, which was initially dominated by the Townsend Plan, founded in California in 1934 (see Amenta 2006; Holtzman 1963; Mitchell 2000; Putnam 1970). The Townsend Plan sought the enactment of a pension and recovery pro-gram that called for $200 monthly pensions to almost all nonemployed citizens over 60 years and organized through "Townsend clubs"—local affiliates that met fre-quently to hear speakers, collect donations, and intervene in politics. Legislation based on the Townsend Plan was rejected, and the Social Security Act was enacted in August 1935. Yet the Townsend Plan grew, and in early 1936 it included about 1.5 million members in about 8,000 clubs and became one of the 57 voluntary asso-ciations ever to win the membership of 1% or more of the U.S. adult population (Skocpol 2003). In 1936, Colorado's National Annuity League promoted a success-ful initiative that granted $45 minimum monthly pensions to those over 60 years old. In 1938, California's "Ham and Eggs" won national attention with a proposal to provide $30 every Thursday to elderly Californians, and in eight other states, organizations pressed old-age pension initiatives, with other states considering legis-lation. Although the elections of 1938 saw the election of many Townsend-endorsed congressional candidates, it brought defeats for the pension initiatives and, as the country suffered a sharp economic downturn, for the Democratic Party, which lost 100 House seats, putting into power a conservative coalition of Republicans and southern Democrats (Katznelson 2013).

In 1939, old-age programs returned to the national political agenda all the same. The administration saw payroll taxes without benefits as a cause of the reces-sion, Republicans sought to prevent the scheduled rise of taxes, and the pension movement wanted to replace old-age programs with universal and generous pen-sions. A Senate bill called for a widespread $40 per month old-age benefit—about the median that public opinion favored (Amenta 2006), but twice the average amount being paid. It failed, but Congress upped the matching payments for Old Age Assistance to $20 per month per person, giving willing states incentives to increase programs' generosity. In 1941, pension legislation came before Congress, but World War II removed it from the agenda, and an even more conservative coalition took congressional power in 1943. Although the Townsend Plan and the pension movement concentrated its efforts on states, Republicans had regained con-trol of most northern state legislatures, and pension initiatives failed. After the elec-tion of President Harry Truman and a Democratic Congress, the old-age and survivors' insurance program was significantly improved in 1950 (Amenta 2006).

For the formative years of U.S. social policy, the elderly had to rely almost entirely on old-age assistance programs, and these varied dramatically in generosity from state to state. Most of the initially generous states came from the West,

although states such as Massachusetts and New Hampshire were also among the leaders. (See the online appendix.) We seek to explain why some states became generous and why some of them remained so during the formative years of U.S. old-age policy. This is an important case of progressive policy because old age was a high-profile issue, with progressive groups backing programs and conservative forces opposing them, and these programs constituted the most fiscally consequential policies in the states during this period.

WHAT DRIVES PROGRESSIVE POLICY? THREE THEORIES

Three theories of progressive policy provide potential answers to these questions. Institutional political theories focus on internal political influences, whereas political mediation theories of movement influence focus on outside factors. Those theories address the initial stages of policy, whereas the policy feedback theory focuses on the influence of initial policy on later policy. In their work, Amenta et al. (2005) provided one institutional politics model and one political mediation model. Here, we outline these three theories and the two previous models and supplement them with three additional models, one each from institutional politics, political mediation, and policy feedback theories.

Inside Influence on Policy: Institutional Politics Theory and Models

Institutional politics theory sees progressive policy change being driven through internal political processes, including electoral results, bureaucratic development, and public opinion. One version of this theory, identified by Amenta et al. (2005), holds that the main driver of progressive policy is the rise to power of a left or left-center regime. This "reform-oriented" regime model is consistent with the "power resources" (Hicks 1999; Huber and Stephens 2001; Korpi 1983) model and has similarities to the "responsible party" model (Schattschneider 1942), in which a party elected to power acts on its campaign promises—here, progressive ones. Electing a left or reform-oriented executive and majorities of left or reform-oriented legislators sends signals throughout the political system that progressive policy is possible. Most of all, these partisan political formations can outvote conservative opponents. According to this version of institutional politics theory, U.S. public spending gains should occur when Democratic or, more rarely, radical third parties take power. This view is supported by New Deal reforms, Medicare, Medicaid, and expanded voting rights under Lyndon Johnson in 1965, and the 2010 Affordable Care Act (ACA) under Barack Obama. At the state level, moreover, there are currently dramatic differences by party control regarding the acceptance of the ACA's support for Medicaid programs (Lanford and Quadagno 2016). For this institutional political model, a second determinant centers on domestic state bureaucracies. Better developed state bureaucracies promote social policy changes and promote public confidence in them (Orloff 1993) by shaping what is possible and being influential policy advocates (Heclo 1974), especially if unconstrained by loyalties to parties or interest groups (Skocpol 1992). Domestic bureaucrats will try to

fulfill the social mission of their bureaus, agencies, or departments by devising proposals, providing information, lobbying, and supporting likeminded groups. These bureaucrats will be effective only if they have wide authority and experience in administrative matters.

Institutional political theory also depends on the presence of two structural political conditions, the first of which is basic democratization (Dahl 1971; Hicks 1999; Key 1949). A democratic polity, or "polyarchy," is characterized by meaningful choices among parties or factions, which are in turn subject to influence by citizens, involving both competitiveness and inclusiveness (Dahl 1971). A central obstacle to progressive policies is an underdemocratized polity, with extensive restrictions on voting, political participation, assembly, discussion, and choices among leadership groups. Democrats almost universally held power in the U.S. South before the Voting Rights Act of 1965, but through one-party regimes based on voting and civil rights restrictions on African Americans (Key 1949), and southern Democrats had conservative voting records on progressive social policy controlled by the national government (Katznelson 2013). A second important political institutional precondition involves the party system and, specifically, patronage-oriented parties: hierarchical organizations seeking to win elections and maintain their organizations through individualized material incentives to supporters. Mayhew (1986) argues that leaders of patronage-oriented parties avoid programmatic benefits because they use resources that might be used as individual rewards. They will sabotage bureaucracies by staffing them with unqualified party loyalists, which may reduce public support for progressive policy (Mayhew 1986; Orloff 1993; Skocpol 1992). During the New Deal, Democrats from patronage-oriented party systems, mainly in the Northeast and Midwest, had lower social policy priorities (Amenta 1998), and states with patronage-oriented parties taxed less (Mayhew 1986).

A second institutional politics model, not considered by Amenta et al. (2005), relies not on electoral results or bureaucracies but on the influence of public opinion (reviews in Burstein 2003; Manza and Cook 2002). Although public opinion has not always been viewed as an institutional influence (Manza and Brooks 2012), scholars often view democratic theory as indicating that politicians will make policy in accordance with public opinion, especially if the issue is a salient one (Burstein 2003). When public opinion is slanted and the issue is salient, politicians are expected to abandon previous policy positions if they differ from those of the general public, to avoid losing reelection. In favor of this view, scholarship has indicated public opinion is consistent with public policy across countries (Brooks and Manza 2006) and in the United States over time (Page and Shapiro 1983). Like the previous institutional political model, the workings of this one relies on democratized polities and open party systems.

The Outside Influence of Social Movements: Political Mediation Theory and Models

By contrast, theories of movement influence over policy see outsider political actors as key drivers of progressive policies (Andrews 2004; Htun and Weldon 2012; Luders 2010; McAdam 1999; Piven and Cloward 1977), and scholars have

argued that organization matters in achieving sustained influence for movement actors (Andrews 2004; Andrews and Gaby 2015). More specifically, political mediation theory holds that movement influence on policy depends simultaneously on movement organization action and the political contexts in which different actions are taken. According to one political mediation model, described by Amenta et al. (2005), well-organized and mobilized challengers that engage in extensive politically "assertive" action will drive policy change. Politically assertive action means to challenge the political prerogatives of institutional actors and includes electioneering, successfully running candidates for office, or to commandeer the legislative process through direct democratic devices such as initiatives and referenda. Successful initiatives automatically change policy, as was the case in Colorado, but even failed ones can advance the movement's issue on political agendas (Martin 2008). This political mediation model also expects more than one route to movement influence. A left party in power may serve as a functional equivalent to engaging in assertive political action for a well-mobilized progressive movement—and produce progressive policy change. So, too, might a powerful domestic bureaucracy. Finally, this political mediation model relies on structural political conditions similar to those in institutional political theory. Movements are expected to lack influence in underdemocratized polities and patronage-oriented party systems. Political officials have supported the position of Tea Party organizations because they feared primary challenges by candidates supporting such positions (Skocpol and Williamson 2012).

A second political mediation model (Giugni 2007), not addressed by Amenta et al. (2005), is more restrictive, holding that movements can influence policy only in highly favorable contexts. A left or allied regime needs to be in power; in addition, there must be favorable public opinion on an issue for movements to alter policy in a direction they seek. Each condition must jointly occur to effect progressive change. For instance, in Italy in the 1980s, ecology and antinuclear movements were influential when these three conditions were jointly present (Giugni and Yamasaki 2009). During the U.S. civil rights movement, moreover, extensive protest in the context of a Democratic regime and favorable public opinion preceded the Civil Rights and Voting Rights Acts of the 1960s (McAdam 1999).

Policy Feedback Theory and a Positive Policy Feedback Model

A third theory concerns the influence of policy feedbacks and was not addressed at all by Amenta et al. (2005). Policy feedback theory holds that the creation of a policy can effect changes that reinforce the policy, through positive feedback processes, or undermine the policy, through negative feedback processes (Béland 2010; Campbell 2012; Pierson 2006; Skocpol 1992; Weaver 2010). Policies provide rules, resources, and organization to enforce them, and retrenching spending policies imposes direct costs on their beneficiaries but provides only diffuse gains to others; politicians often avoid retrenchment because they fear beneficiaries may make them pay electorally (Pierson 1994). Scholars have focused mainly on positive policy feedbacks and have identified mechanisms that can help promote and fend off attacks on progressive policies. These reinforcements include upgraded

bureaucratic capacities (Skocpol 1992), the support of organized political constituencies benefitting from the policy (Campbell 2003), or gains in public opinion on the issue after its implementation (Myles 2006). Moreover, policies may have self-reinforcing symbolic legacies (Adams, Clemens, and Orloff 2005). However, policies can have negative feedback features (Weaver 2010), such as those handled by patronage processes (Skocpol 1992) or benefiting those portrayed as "undeserving." They may also be subject to deterioration through "drift," which occurs if socioeconomic conditions change, such as inflation or higher standards of living, and policies are not improved accordingly (Hacker and Pierson 2010).

Here, we identify a positive policy feedback model. A progressive program that is strong and generous will remain so at a later point in time, if it is reinforced by positive feedback mechanisms: a well-organized group, favorable public opinion, and strong bureaucratic organizations supporting the program. It is not clear how many of these mechanisms need to occur to produce the effect, however. This model is not inconsistent with others, as it requires exogenous determinants during a critical juncture to initiate policy, though these initial determinants should not matter greatly at a later point in time. Scholars argue that the Social Security program has benefited from each of these positive feedback mechanisms (Béland 2007; Campbell 2012). The argument is also consistent with the Republican Congress and president's failure to repeal the Affordable Care Act in 2017—which proposed removing health coverage from more than 20 million recipients when public opinion had become favorable to the program. By contrast, simply having one additional Republican senator, under a Democratic president and Congress in 2009, would have prevented the law.

Hypotheses from Each Theory and Model

Below are hypotheses generated from three theories and five different models in set notation, and represent expectations for the fuzzy-set qualitative comparative analysis. "Obstacles" refers to the presence of either an underdemocratized polity or patronage-oriented parties. "Democratic" refers to a Democratic Party regime in power. "Administrative" refers to strong domestic bureaucratic authority. "Support" refers to public opinion support for a policy. "Mobilization" refers to well-organized and -mobilized social movement actors. "Assertive" refers to the presence of assertive movement political action.

We start with the two hypotheses from Amenta et al. (2005). The first centers on the institutional politics model featuring power resources and responsible parties:

DEMOCRATIC*ADMINISTRATIVE*obstacles → PROGRESSIVE POLICY

(In fsQCA notation, a condition in all capitals indicates its presence and in lowercase indicates its absence; an asterisk (*) indicates the logical operator *and*; a plus sign (+) indicates the logical operator *or*.) This reads that the absence of democratic obstacles combined with the presence of a Democratic Party regime and strong administrative authority should be sufficient to produce progressive policy. The second hypothesis from Amenta et al. (2005) is based on the first political mediation

model. There are three separate paths to influence, as mobilization may produce results in combination with assertive movement action or institutional political conditions.

MOBILIZATION *(ASSERTIVE + DEMOCRATIC + ADMINISTRATIVE) *obstacles → PROGRESSIVE POLICY

This reads as mobilization will be sufficient to effect progressive policy when combined with the presence of assertive political activity, a Democratic Party regime, or strong administrative authority, in the absence of democratic obstacles.
We also address three additional hypotheses. The first is derived from the second institutional politics model focusing on public opinion support:

SUPPORT*obstacles → PROGRESSIVE POLICY

This reads that the absence of democratic obstacles combined with public opinion support should be sufficient to produce progressive policy.

The second alternative is based on the alternative political mediation model concerning the joint effects of movements and public opinion:

MOBILIZATION*DEMOCRATIC*SUPPORT*obstacles   →   PROGRESSIVE POLICY

This reads that mobilization will be sufficient to produce progressive policy when combined with the presence of both a Democratic Party regime and public opinion support for the policy, along with the absence of democratic obstacles.

The third alternative is taken from the positive policy feedback model:

PROG. POLICY (T1) * FEEDBACK MECHANISMS → PROG. POLICY (T2)

This reads as progressive policy at time one will lead to progressive policy at time two, if the policy has reinforcing feedback mechanisms, such as bureaucratic, organized group, or public opinion support. Otherwise policies may be subject to drift or retrenchment.

Although these models are cast as alternatives, they also overlap. Most are predicated on the absence of extensive democratic obstacles. Both political mediation models require favorable institutional political contexts. The policy feedback model requires the presence of some causal forces to establish the policy and political institutional and organized group feedback mechanisms to prevent retrenchment. We turn to our approach to appraising these theories and how it advances on previous research.

DATA, METHODS, AND MEASURES

We appraise these arguments on old-age programs in U.S. states, which have served historically to test many models of political influence over policy. Although comparisons across U.S. states do not provide as great variation on the ideology of political parties, as they do in Europe, scholars have argued that ideological

differences among U.S. parties have been significantly influential in explaining policy (Amenta et al. 2005; Hicks et al. 1978; Plotnik and Winters 1985). Moreover, U.S. states at midcentury provide greater variation than postwar European countries, to which these arguments also apply, on structural political conditions, as voting rights were denied to African Americans in the one-party South (Key 1949), and patronage party systems dominated in various parts of the North (Mayhew 1982).

We mainly employ the data from Amenta et al.'s (2005) study of old-age assistance, but both augment these data and analyze this augmented data set differently in key ways that are more historically appropriate and make it possible to appraise all three theories and the subtheoretical arguments. For their outcome measure, they employ a measure of average pension generosity from 1936 to 1949, identifying 13 states having generous pensions and employing crisp-set QCA. By contrast, we examine generosity at both the beginning and end of the period—which enables us to address the potential influence of movements and Democratic regimes during the New Deal, as well as to appraise the policy feedback argument. Second, we analyze public opinion in QCA, which they did not. Third, we use more time-appropriate movement data, including a better measure of Townsend Plan organization and its first bids at assertive action, efforts to influence House races, to ascertain their influence on initial generosity. Finally, we use fuzzy sets, which preserve information and allow closer connections between theoretical arguments and set-theoretic explanatory measures (Ragin 2008).

To appraise all the theoretical arguments, we analyze two main fuzzy-set outcome measures. The first is *initial generosity*. Following Amenta et al. (2005), we employ residuals from a regression of the average old-age assistance benefit on per capita income and the percent elderly, but taken from the first three years (1936–1938) of the period. The next outcome measure is *endpoint generosity*, employing the same process on the average of the last three years of data (1947–1949). This approach contrasts with that of Amenta et al. (2005), who examine residuals from the entire period and thus lose historical specificity. These outcome measures are calibrated with states having scores of 7 and above as enjoying full membership in the set of generous benefits, states with scores of 0 or lower being all the way out of the set of generous benefits, with 3 as the crossover point that indicates one-half membership in the set. This crossover point is at an empirical break in the data and is slightly more expansive than that of Amenta et al. (2005). For initial generosity, there are 17 states mainly inside the set. There are similarly 16 for endpoint generosity. We also calibrate these sets with more restrictive crossovers, and the results are substantially the same. (See the online appendix.)

The first set of explanatory or causal measures includes political institutions. The first such measure is a categorical one identifying underdemocratized polities and includes all 11 states of the former Confederacy, which prevented the voting of African Americans, and many poor whites, through poll taxes, white primaries, literacy tests, and violence (Key 1949). The second measure is of patronage-party dominance, based on Mayhew's (1986) five-point scale of patronage-oriented political parties. Our calibrated set measure scores 0 for those at one, the lowest level, on Mayhew's scale, .4 for those scoring two, .6 for those at three, .8 for those at four, and 1 for those at five. This is consistent with Mayhew's view that states scoring

three were mainly dominated by patronage party organizations, and those scoring two were significantly influenced by them. Again, robustness checks indicate that minor changes in these calibrations do not affect the results. Unlike Amenta et al. (2005), we combine the measures for underdemocratization and patronage parties into democratic *obstacles*, for two reasons: The theoretical arguments expect the absence of these obstacles to promote progressive policy, and it is valuable to reduce the number of causal measures in QCA. The measure *obstacles* gives each state its highest score on the component measures.

The next two exogenous measures address the shorter-term influences of the first institutional political model. One measure addresses state-level domestic state administrative capacities: *admin* scores one for states having labor commissioners with long-standing rule-making authority (Brandeis 1935). The second measure, *Democratic* Party regime is a measure of Democratic Party control of the governor and both houses of the legislature in each state (Burnham 1992). We calibrate the set of *Democratic* Party regime by setting states with Democratic regimes in 40% of the years as fully in, states with Democratic regimes in none of the years as fully out, with 30% of the time as our crossover point. That is because having a Democratic regime in power for even a significant interval would give it a chance to increase generosity in policy. For initial generosity, the measurement takes place over the first three years and for endpoint generosity over the intervening years.

Next, we include a measure of public *support* for generous old-age benefits, based on the results of a very large Gallup poll from 1938 (AIPO 1938a, 1938b), involving approximately 3,000 respondents. It asked, "*How much per month* should be paid to a single person?" for an old-age pension. Although this poll is not strong by current standards, it is large and the only one available. Also, its results yielded a significant and positive coefficient in regression analyses—though Amenta et al. (2005) did not use the measure in their QCA. Given that $40 would go much further in Mississippi than New York, we residualize this measure on income. States scoring at 10 are all the way in the set of public support for generous old-age benefits, with 0 or below all the way out, with 5, where there was a break in the data, being the crossover point. (Trials with somewhat different limits do not greatly influence results—see the online appendix.)

Each movement model expects movement organization and mobilization to be influential. We generate two exogenous set measures of organization and *mobilization*. For the first period, we employ a measure of Townsend clubs per congressional district (Amenta 2006; Holtzman 1963). It includes states at 73 clubs or higher per district as fully in, with 3 or fewer as fully out, with 30 per district as the crossover. The latter point still constituted a healthy presence and described a break in the data. The second mobilization measure is from Amenta et al. (2005), who derive a score from the presence of Townsend clubs in the *Townsend Weekly*, ranging from 0 to 4. We calibrate scores of 4 as all the way in the set of being highly mobilized, and 1 or below all the way out. Scores of 3 are counted as .67, and scores of 2 as .33. This measure is employed for the second period.

We similarly calibrate two sets for politically *assertive* action. For the initial period of old-age benefits, we differ from Amenta et al. (2005) to employ the percentage of the congressional delegation that was elected in 1936 with the support

and endorsement of the Townsend Plan, taken from the *Townsend Weekly*. The fuzzy set is calibrated with 50% of the delegation as fully in the set of assertive action, 0% as fully out. The crossover point is set at 15%, given that even a small representation would be a significant showing. We use this measure because there were almost no initiatives in this early period and thus they could not influence the initial setting of old-age policy. For the endpoint analyses, we follow Amenta et al. (2005) in relying on state initiatives to boost pensions and count a state as fully in with two or more initiatives, all the way out with zero. The crossover point is set at 0.5, however, to give high credit to states with one initiative, as the model expects any initiative to be influential and is also consistent with Amenta et al. (2005). Finally, to appraise the policy feedback model, we include the measure of *initial* generosity, the first outcome measure, to explain *endpoint* generosity.

ANALYSES AND RESULTS

In QCA, the results are based on truth table "rows" (or vector space corners for fuzzy sets) associated with the outcome in question. If there are four such measures, there will be 16 possible rows, 32 rows for five causal measures, 64 for six, and so forth (Ragin 2008). The next step is to logically reduce the rows associated with the outcome to smaller combinations of measures. We first seek to replicate the QCA results of Amenta et al. (2005), given that the regression results are the same, and they mainly hold up. (See the online appendix for details.) However, as noted above, these analyses do not examine the initial period separately, do not always use historically appropriate measures, and do not appraise the influence of public opinion or policy feedbacks, and thus do not address the three additional hypotheses above. The results below also provide improvements in fit and cases explained.

We turn to our own analyses, beginning with initial generosity, and like Amenta et al. (2005) include six exogenous set measures, but there are some key differences. One is that we combine the underdemocratized and patronage party measures into *obstacles*, through set union. The greater the number of exogenous measures, the more likely that rows will be unpopulated, and so it is valuable to reduce the number of conditions when appropriate (Ragin 2008). Also, we substitute the more historically valid measures for Townsend mobilization and assertive action. Finally, we add public opinion *support*—to appraise the alternative institutional politics and political mediation models. Because the cases are few, 48, like Amenta et al. (2005), we also count any row with at least one case in it as empirically present. We report "intermediate" solutions, the most theoretically justifiable of the three possible solutions (Ragin 2008; Schneider and Wagemann 2013). Democratic obstacles are expected to inhibit generosity, and the rest of the measures are considered to be "push" factors. Intermediate solutions incorporate these assumptions.

We start with initial pension generosity. There are 12 truth table "rows" that meet the standard of generosity, including 14 states. (For the truth table and alternative results, see the online appendix.) The intermediate solution as a whole covers

Table I.   Six-Measure FsQCA "Intermediate" Results for Pension Generosity, Initial Period

Solution	Cons.	Cov.	Uniq. Cov.	Cases
obstacles*ADMIN*assertive	0.935	0.350	0.229	AZ, CO, MA, NH, NV
obstacles*ADMIN*DEMOCRATIC* support	0.982	0.240	0.144	AZ, ID, UT, WA
obstacles*democratic*ASSERTIVE* SUPPORT	0.850	0.173	0.024	ME, MN, OR
obstacles*democratic*MOBILIZED* ASSERTIVE	0.864	0.335	0.158	CA, ME, ND, OR, SD, WI
Total	0.910	0.811		

81% of the outcome at a .91 level of consistency (Table I). There are four main solution terms, which constitute causal paths to the generous pensions. The absence of *obstacles* appears in each, and separate analyses (see the online appendix) indicate it is a causally necessary condition (Schneider and Wagemann 2013). Reducing the truth table provides some support for first institutional politics model presented by Amenta et al. (2005). One solution term includes measures from the model regarding power resources: It includes administrative powers and a Democratic regime (though also the absence of public opinion support). This term covers 24% of the positive cases and uniquely identifies Idaho, Utah, and Washington. A second term relies only on the presence of administrative powers, along with the absence of assertive action, and covers 35% of the cases. It includes Massachusetts, Nevada, New Hampshire, and Colorado. As noted above, however, Colorado's initial pension was sparked by the National Annuity League's successful initiative, which provides support for the theory of movement influence. Removing Colorado from the analysis does not greatly affect the results (see the online appendix). The lack of influence of public opinion support means there is little evidence, however, in favor of the alternative institutional politics model.

However, the analyses also provide support for both political mediation models of movement influence, including the second one regarding public opinion, advancing beyond the results in Amenta et al. (2005). One solution term includes the presence of a large number of Townsend clubs and assertive activity in states dominated by Republicans, or at least not significantly controlled by Democrats. This path to influence covers about 34% of the cases, including Oregon, California, South Dakota, Maine, and North Dakota. Finally, there is a solution term that includes assertive action and public opinion support, also in the context of Republican regimes. It overlaps significantly with the other movement combination, though uniquely includes Minnesota. All in all, about half of the explained cases gained generous pensions by institutional politics routes and the other half by movement ones.

Almost all generous states are covered by the model, though there are three states that are not: Pennsylvania, Wyoming, and Kansas. Pennsylvania stands out in that it has a patronage-oriented party system, which should be disqualifying, though it also had strong administrative powers and had a Democratic regime elected into office in 1936. It is only the seventeenth highest state on pensions, however, barely above .5 in the set. Similarly, Wyoming is fourteenth, possibly

suggesting that the standard for generous pensions is set too low. Kansas is a bigger anomaly. It had no democratic obstacles but exhibited none of the insider or outsider characteristics expected to drive pensions. However, it is possible that something resembling mobilization and assertive movement activity were present there. An organization called the People's Annuity Plan, Inc. was demanding a $25-per-week pension program and three candidates for governor in 1938 called for pension increases, with the independent candidate running mainly on that issue (Buckingham 1938).

We turn to the generosity of benefits at the endpoint of the period, and simple inspection of the data provides some support for the potential influence of policy feedbacks. Eleven of the 17 states that are at least mainly in the set initial generosity are also among the 16 states that are mainly in the set of endpoint generosity, suggesting considerable stickiness over time. That said, six initially generous states are no longer generous by the end of the period, indicating that the relationship is not perfect. In addition, four states became generous that were not initially, and that suggests the presence of alternative causal routes to that outcome. (See the online appendix for these lists.)

The formal analyses also demonstrate support for the positive policy feedback model. We include the previous six measures, plus the one for initial generosity. Six rows remain above the standard for generosity, including eight states, with five rows including the measure of initial generosity (see the online appendix for the truth table). As Table II shows, the intermediate solution covers 51% of the cases at the .87 consistency level, with four solution terms, each including the absence of obstacles, which remains a necessary condition. (See the online appendix.) Three terms include the presence of an initially generous pension, and each also includes the presence of mobilization, suggesting that group mobilization safeguards progressive policy. The fourth solution term provides a hybrid political mediation route to generous pensions. It includes the presence of mobilization and assertive action, as well as Democratic control and public opinion support. If we omit public opinion support, which is measured distant in time from the second period, the results improve. The intermediate solution has greater coverage, 59%, at a similar level of consistency, and just two solution terms, with a lack of democratic obstacles and the presence of mobilization in each. One term includes initial. A second term describes a political mediation route to generous pensions. The results underscore that initially generous pensions will usually remain so—when there is an organized and

Table II. Seven-Measure FsQCA "Intermediate" Results for Pension Generosity, Endpoint Period

Solution	Cons.	Cov.	Uniq. Cov.	Cases
INITIAL*obstacles*ADMIN*DEMOCRATIC* MOBILIZED	0.927	0.243	0.160	AZ, UT, WA
INITIAL*obstacles*admin*MOBILIZED* assertive	0.949	0.128	0.042	KS, WY
INITIAL*obstacles*MOBILIZED*assertive* SUPPORT	0.876	0.209	0.088	CO, NH, WY
obstacles*DEMOCRATIC*MOBILIZED* ASSERTIVE*SUPPORT	0.673	0.132	0.053	OK
Total	0.866	0.512		

mobilized group backing them. The results also suggest that it is possible for programs initially not generous to be upgraded. However, initial generosity in itself does not necessarily mean that a program will remain generous, and programs can "drift" if not supported and upgraded (Hacker and Pierson 2010), especially if they are monetary benefits subject to inflation.

In short, the results provide some support for each of the five models, except for the institutional politics one regarding public opinion. Initial generosity was prompted in some states by way of insider institutional political processes. In other states, the politically mediated influence of a social movement, including mediation through favorable public opinion, brought about generous pensions. In the second period, initial generosity was a key determinant of later generosity, but it also required group mobilization, as expected by the positive policy feedback model. Yet there was still a route for states that were not generous to become so, one that worked through the politically mediated effects of a social movement.

The results suggest that the claims of Amenta et al. (2005), based on an institutional politics model and political mediation model excluding public opinion, require supplementation from a political mediation model relying on public opinion and a positive policy feedback model. The paths to initial generosity come from both institutional politics and social movement directions. Yet strong public opinion in favor of generous pensions works similarly to having a favorable regime in power or favorable domestic bureaucracies. However, initial generosity in programs can be eroded, possibly through drift or other processes. Positive feedback mechanisms, including continued organization and mobilization, can prevent that from happening.

Do these models help to explain why a policy would be regressive or stingy? Offhand, one might expect that simply applying the opposite of the determinants of progressive policy would produce regressive policy, but the relationships may not be symmetrical. The absence of democratic obstacles was necessary for generous old-age pension programs, for instance, but their presence may not be necessary for stingy pensions. Moreover, the absence of some of the push factors for progressive policy may not matter for regressive policy. Finally, arguments about policy feedbacks may not apply. If a policy is initially stingy rather than generous, that policy should not necessarily remain stingy in the future.

Not being generous is less dramatic than being actively stingy and we measure stinginess accordingly. We use the same raw scale as with the measurement of generosity. But we count states with scores of –7 as being fully in set of stingy states, and those with 0 as being fully out, with the crossover point being –3, there being a break between states scoring above and below that figure. For these exploratory analyses, we assume that the causes that will produce generosity should work mainly in the reverse direction in influencing stinginess. Each of the 10 stingiest states had either underdemocratized polities or patronage parties, and most of them lacked traditions of administrative authority and the extensive presence of Townsend clubs. None included assertive action. (See the online appendix.) But we turn to the QCA for more detailed analyses. Because the positive policy feedback argument is not entirely applicable, we focus on initial stinginess in policy.

Table III. Six-Measure FsQCA "Intermediate" Results for Pension Stinginess, Initial Period

Solution	Cons.	Cov.	Uniq. Cov.	Cases
OBSTACLES*democratic*mobilized* assertive	0.999	0.260	0.241	MS, NJ, MD, RI, DE
OBSTACLES*admin*MOBILIZED* support	0.973	0.115	0.081	FL
OBSTACLES*admin*mobilized* assertive*SUPPORT	0.859	0.194	0.160	AR, KY, IN, LA, WV
Total	0.941	0.523		

The results suggest that stinginess works largely in a symmetrical way. An analysis of the truth table provides three intermediate solution terms (for the truth table, see the online appendix). Each solution term includes the presence of democratic obstacles, though it falls short as a necessary condition. (See Table III.) Each term also includes the absence of at least two push factors. One term includes the absence of two of the institutional politics measures, and the other two include institutional politics and movement factors, as indicated by the mediation model. The solution covers 52% of the cases at a .94 level of consistency. These results, though tentative, provide additional support for the institutional politics and political mediation models.

DISCUSSION AND CONCLUSION

This article seeks to advance thinking and research surrounding the determinants of progressive policy making. Progressive policies are rare, as they provide benefits for groups with little power and have to be won over the opposition of the powerful. We identify and model three theories of political influence over progressive policy. These include an institutional politics theory, a theory regarding movement influence over progressive policy, and policy feedback theory. We develop five configurational models from these theories, three of which go beyond previous research. Empirically, we appraise the models on U.S. old-age policy in its formative years, when old-age benefits were the subject of intense political battles, using fuzzy set QCA, which is designed to address these sorts of arguments. The results provide support for each of the different theories and four of the models. These results advance beyond those in Amenta et al. (2005), which address only institutional politics and political mediation models, without taking into account public opinion and neglect models based on policy feedback theory.

The results provide some good news for U.S. proponents of progressive policy. Political institutional obstacles to democracy, including an underdemocratized polity and patronage-based parties, stood as major hindrances to progressive old-age policy in its formative years. These obstacles were reduced by the Voting Rights Act of 1965 and various reforms of political parties and nomination systems that work mainly through primaries. The results also identify different causal routes to progressive policy. One is the insider route of electing progressive Democratic Party regimes to power. With the gradual attenuation of conservative southern

Democrats, the Democratic Party has developed a more consistent progressive ideology, and so electing Democrats to take charge of governments at the national or state level will be more likely to generate progressive policy. This was the case briefly during the Obama administration in parts of 2009 and 2010, and resulted in the Affordable Care Act. A Democratic-dominant regime in California under Governor Jerry Brown enacted many progressive reforms, including carbon emissions policies, stronger penalties against rape, low-income housing, overtime pay for farmworkers, and making California a "sanctuary state." In addition, the strong support for two different political mediation models suggests that the outsider route of movements influencing progressive policy is also a viable strategy. The results also suggest that movements can influence the characteristics and quality of programs, going beyond previous research, which indicates that protests influence political agenda setting (Soule and King 2006). Having more extensive influence may depend on movement actors moving beyond protest to engage political processes more directly.

The support for the positive policy feedbacks model provides yet more good news for proponents of progressive policy. Programs that were initially generous remained that way—as long as they were accompanied by a high level of mobilization behind them—and inclusive progressive policies will often spur such organization (Campbell 2003). And so the determinants of progressive policy—often short-term political or movement influences—may mainly have secondary and long-lasting effects. Business-oriented organizations, not public-interested or social movement ones, typically dominate policy making (Gilens and Page 2014; Hacker and Pierson 2010). But the combination of short-term movement influences and policy feedback can help to secure progressive policies for the long term.

However, the implications of the results also provide extensive bad news for U.S. proponents of progressive policies. Democratic obstacles stunted U.S. progressive policy making when the rest of the industrialized world was completing and consolidating welfare states (Hicks 1999; Huber and Stephens 2001; Mann 2012), bringing long-term negative consequences. For health insurance, feedback opportunities were missed, and the door was left open to far less progressive private alternatives, notably health care through employment, which made universal health care more difficult to achieve. Moreover, many decidedly nonprogressive policies with extensive fiscal requirements, notably provision for the military and incarceration, have benefited from positive feedback effects. Furthermore, in recent decades, new democratic obstacles have emerged. These include the disfranchisement of felons (Manza and Uggen 2006). The 2013 Supreme Court decision *Shelby County v. Holder* reduced the Voting Rights Act's authority, and Republican Party regimes restricted voting rights in Wisconsin, Ohio, Texas, and North Carolina through stringent identification requirements. Each of these restrictions target African American and low-income voters likely to support Democrats. Even though patronage parties have declined, their legacies remain in the Northeast and Midwest. In addition, under the influence of movements such as the Christian right, anti-tax, and gun rights organizations, the Republican Party has over the last half century moved further right than the Democratic Party has moved left (Mann and Ornstein 2016), intensifying opposition to progressive policy and buttressing the opponents of it.

There are several limitations to these results, however. One has to do with public opinion. Several aspects of the processes by which public opinion polls are said to influence policy makers (Manza and Cook 2002) were not fully operative in the 1930s and 1940s. Polling appeared only episodically in the wake of news events, and state-by-state figures were not available to policy makers. Moreover, U.S. old-age policy is just one case with some distinctive and favorable features, including a sympathetic constituency, thus limiting the transportability of these findings. Further work will be needed to gauge how far these analyses apply to other policies and democratized polities.

All that said, the analyses help to provide a better understanding of the influence on progressive policy of the interaction of political institutions, institutional actors and activity, including the results of elections and bureaucratic development, and movements and their collective action. Progressive movements may influence policies far less overall than business and other conservative organized groups (Gilens and Page 2014; Hacker and Pierson 2000). Yet there remain pathways for enduring progressive influence, even when movements or their main collective action may happen only relatively briefly. Future research across countries, time periods, and policies should explore these interactions further to identify the different routes to progressive policy change.

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