

Was the South Pivotal? Situated Partisanship and Policy Coalitions during the New Deal and Fair Deal

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Committed to a situated historical approach to studies of Congress, this article demonstrates how the 17-state Jim Crow South composed a structurally pivotal bloc during the New Deal and Fair Deal (1933–52) due to its size and cohesion and the need for southern votes to constitute majority coalitions. Empirically, it asks how southern members deployed this capacity and with what consequences. Utilizing a multilevel coding of policy substance, it tracks whether southern roll-call behavior was consistent with Democratic Party positions and traces changes over time with consequences for lawmaking and party politics. Analytically, the article moves beyond central current debates about parties and preferences that provide no distinctive place for the South and advances “situated partisanship,” an approach that privileges temporality and policy substance to understand when and with regard to which issues political parties are able to organize the preferences of their members and control lawmaking.

“Who is pivotal in U.S. lawmaking?” —Keith Krehbiel (1998, 20)

The place of the South in national lawmaking is both theoretically and empirically underspecified.^{1,2} The array of theories of lawmaking that we possess—including conditional party government and pivotal politics—usually finds no particular place for the preferences and behavior of representatives from the country’s most distinctive region. This we believe to be unfortunate, especially for students of Congress and history. Just as it is impossible to understand antebellum lawmaking without taking the slaveholding interest into account, so post-Reconstruction lawmaking cannot be comprehended properly without identifying how a distinguishing southern vantage shaped Congress both in the long era of Jim Crow and in the new world fashioned by its defeat.

Students of Congress have portrayed a world of representation in which the key actors either are two

competing, if sometimes internally heterogeneous, political parties, or individual members of the House and Senate with distinctive, well-ordered, and rather fixed locations on an ideological map. In these portrayals, the South dissolves as a coherent unit of analysis. Although the South and its representatives can make appearances—conditional party theory was initially built from the story of how changes to the Democratic Caucus were driven by the demise of southern Dixiecrats (Rohde 1991)—they have secured no enduring or distinguishing standing, and thus enter and exit in a rather ad hoc manner. Even the conditional party approach treats the South as one case among many, assuming that polarization and party homogeneity, its key variables, arise from the distribution of preferences in Congress, with no connection to how this allocation is rooted in any particular regional alignment. Congressional scholarship, in short, largely has left behind the

¹Data files and the online appendix are available at <http://iserp.columbia.edu/content/american-institutions-project>.

²Of course, there are some important book length exceptions. These notably include Bensel (1984) and Sanders (1999). There also is a significant older body of work on what it calls the conservative coalition in Congress, an important precursor to our analysis (Manley 1973; Moore 1967; Patterson 1966), and an important chapter on “the fifteen years between 1937 and 1952 when the conservative coalition shaped policies under Democratic presidents” in Schickler’s account of institutional developments in Congress (2001, 136–88). While we aim at a fuller specification of the key issues raised in this body of scholarship, we abjure the term “conservative coalition” because we find it to be both too broad and underspecified. Too broad because it implies an overarching shift, but at least in the period we cover the defection by southern Democrats to Republican positions occurred less often than the term suggests; underspecified because it tends to be used without sufficient reference to the substantive content of such defection votes by southern members.

challenge posed by V.O. Key, Jr.'s landmark chapters on the South in Congress (1949), the wish to comprehend the meaning, extent, and tensions of Democratic Party membership in tandem with a strong desire to protect southern interests.

Returning to the period in the 1930s and 1940s that he highlighted, this article seeks to identify distinct features of southern representation. We specify congressional partisanship in that era as a three-actor competition among Republicans, nonsouthern Democrats, and southern Democrats, and we discuss implications for congressional theory. These, of course, are not wholly equivalent units. Yet in delineating southern representatives as composing a "quasi-party"—a coherent legislative grouping that sat uneasily within its political party but was more than just a constellation of individuals who happened to share preferences at the moment—we treat these blocs as potentially analogous units of action.

We do so on the understanding that it is important to distinguish circumstances where such interstitial groups simply are ad hoc from those where they compose durable blocs with coherent preferences. Further, when groups of legislators actually combine in quasi-parties, we are challenged to understand when and how often that bloc's votes are pivotal to lawmaking, and whether, and to what extent, this capacity extends to significant legislation. Placing such actors in historical circumstances, it further is important to inquire about the duration of their coherent constellation and about the substantive content of issues about which bloc members remain loyal to party positions as distinct from those where they bolt to follow the distinctive preferences that define their position as a group within the legislature.

We approach southern Democrats in this manner. Like other members of Congress, they held all the obvious motivations for party loyalty, not least the wish to secure and maintain majority standing for the Democratic Party, a status that could offer rewards of patronage, influence, and seniority, and legislate to relieve their region's deep poverty. But as they also possessed a commitment to their racial order, they had to decide whether they simultaneously could guard the autonomy of their section while promoting New Deal and Fair Deal policies. How, they had to ask, could the tension between party loyalty and regional racial preferences be managed? The manner in which they would answer this question determined the very content of New Deal lawmaking, and with it, the character and fate of American democracy.

Two puzzles loom. Considered as a distinctive voting bloc, did southern members possess the

capacity to be pivotal? With what empirical and historical consequences?

Southern representatives, by and large, were structurally no less pivotal than the other two collective actors in each Congress we study. Moreover, southern Democrats often proved to be the most important of the three groupings because in the constitution of majorities their votes were more pliable in light of the cross-pressures of party and preference with which they contended and the distinctive manner in which they assessed the meaning of legislative proposals. At stake was not just whether or how, but when they would exercise the advantages conferred by their pivotal position. An effort to pinpoint southern congressional behavior by attending to the substance of lawmaking thus composes the heart of this article. Legislative capacity, party voting, and the character of coalitions crossing party lines depended on these southern decisions. Based on this assessment, we can discern when and how a decisive shift in southern propensities triggered a transformation in national politics.

The empirical core of this investigation is a systematic examination of the boundaries, origins, and challenges to partisanship posed by southern representatives within the Democratic Party by comparing their roll-call behavior with that of non-southern Democrats and Republicans across the full range of 1,898 House and 2,533 Senate roll calls with policy relevance in the 73rd to 82nd Congresses.³ To do so, we employ a substantive classification of issues and utilize a typology of roll calls that distinguishes partisan, cross-partisan, sectional, and disloyal voting by southern members.

Our approach identifies the times and issues that characterized the roll-call behavior of southern members set within their often challenging historical situation. It is intended to complement more familiar and commonly used empirical designations, especially the estimation of ideal points of legislators. Utilizing DW-NOMINATE scores, it is possible to show how, pulled by both party and region, southern representatives often ended up in a pivotal position at or near the floor median. But absent a disaggregation by substance, a certain kind of fallacy of composition is possible. On some issues the tug of party proved

³We included procedural roll calls that are clearly linked to a substantive policy issue. After reviewing the *Congressional Record* for each procedural roll call, we examined the surrounding debate to determine whether a roll call was purely procedural (e.g., a vote on the election of the Speaker of the House) or was clearly linked to a policy under discussion (e.g., a vote to adjourn made during fierce debate of a bill).

strong, while on others the tug of region. Our goal is thus to understand how the substance of politics, studied in historical time, can reveal the sources that underpin aggregate ideal-point depictions, which portray legislators in a seemingly fixed two-dimensional location. In discerning and appreciating the selection effects of policy issues, and in designating how they vary over time, our empirical analysis invites the estimation of ideal points by policy areas. Unfortunately, the number of roll calls for any single Congress for the fine-grained policy coding that we believe to be most revealing too often is insufficient to effectively pursue this line of analysis with NOMINATE. But it is available in principle both as a way to follow-up and confirm our findings.⁴

These years, which include monumental legislation about domestic and international relations, were characterized by strongly articulated ideological and partisan differences which were especially fluid with respect to party voting, cross-party coalitions, and the capacity of the majority party to pass significant legislation (Brady, Cooper, and Hurley 1977; Collie 1988; Sinclair 1978). Stipulating that the era's southern members had three central commitments—sustain the majority status of the Democratic party to retain their power in the legislature; promote the economic development of the region; and protect the racial order of the South—we wish to know when this potentially pivotal bloc maintained party loyalty and when its members joined the opposition party to stop passage of legislation favored by the majority party to which they belonged or pass legislation against the party's wishes. By identifying variations to partisan, cross-partisan, sectional, and disloyal votes across policy areas and over time, we detect modifications to the policy choices southern Democrats made in Congress, especially in the 1940s.

We close by discussing the implications of these findings for debates about the status of partisanship in congressional studies. We suggest the need to advance beyond the partisan-preference antinomy by analyzing particular temporal configurations with regard to specific policy questions. Working from within an understanding common to historical and rational choice institutionalists that situations induce

preferences and choices (Katznelson and Weingast 2005), we offer an account of “situated partisanship” to make sense of the southern role, an approach that privileges policy substance in historical time. On this view stressing historical contextualization, the content of a given policy agenda at a particular moment shapes the capacity of political parties to organize the preferences of their members and control lawmaking.

Unlike much existing theory, this perspective does not assume a necessary symmetry between parties and preferences, nor does it treat parties and preferences as inherently competing alternatives. Political parties, after all, are composed not just of individuals, but of coherent clusters of members who share fates and hierarchies of preference. Thus it is important to identify those members who are pivotal actors within their party and in the legislature not only as individuals but as parts of one or more behavioral blocs and to offer questions and tools that can identify and explain bases for the relative cohesion of such quasi-parties.

During the New Deal-Fair Deal era, southern members of the Democratic Party constituted the most significant grouping of this kind. Because the existence and character of internal party blocs can vary (some, like Jim Crow southern Democrats, may be durable, while others may be more ephemeral and even more issue specific), the lawmaking situations of many members are more complex than bulky labels like “party” and “preference” can possibly capture.

The South as Structurally Pivotal

We define the South as the states that mandated racial segregation.⁵ This is a designation both prior to and independent of the behavior of their representatives in Congress. The geography of Jim Crow took in Missouri, plus the states the U.S. Census counted as southern—a West Central region (Arkansas, Louisiana, Oklahoma, and Texas), an East South Central Region (Alabama, Kentucky, Mississippi, and Tennessee), and a South Atlantic South (Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, and West Virginia). Fifteen of these states had practiced chattel slavery on the eve of the Civil War. These, plus West Virginia, which then was part of Virginia, and Oklahoma, which only achieved statehood in 1907, all

⁴In future work we anticipate experimenting with different levels of temporal and substantive aggregation to overcome this limitation, and with alternative methods and measures, including the Bayesian approach of the IDEAL method (Clinton and Jackman 2009). Here, we wish to show the potential power of a rigorous content-rich historical approach as a way of pointing inquiry in new directions.

⁵Three states—Arizona, Kansas, and New Mexico—did not mandate segregation, but offered local governments the option to require it.

required racial segregation before it was outlawed in public schools by the 1954 *Brown* decision. Further, only these states prohibited interracial marriage at the start of 1967, the year the Court ruled such bans to be unconstitutional in *Loving v. Virginia*. Such requirements and prohibitions characterized Delaware as much as Mississippi, Missouri as well as Alabama.⁶

The South, in short, composed a long-standing compulsory racial order of white supremacy. No member of Congress at any time during the full New Deal era would have thought that the region did not comprise a clear, discrete, and coherent entity. A future president of the Southern Political Science Association, the Florida-based political scientist Marian Irish, noted in 1942 that, like representatives from other areas, “the Southerners advocate all legislation which favors their constituents.” But “what makes their stand seem unique is the persistence of a single sectional motive” (Irish 1942, 92). At the end of that decade, Key identified that motive. “We ought to be both specific and candid,” he wrote, “about the regional interest that the Democratic party of the South has represented in national affairs. It must be conceded that there is one, and only one, real basis for southern unity, the Negro.” Southern Politics, he observed, “is at times interpreted as a politics of cotton, as a politics of free trade, as a politics of agrarian poverty, or as a politics of planter and plutocrat.” Yet “although such interpretations have a superficial validity, in the last analysis the major peculiarities of southern politics go back to the Negro” (Key 1949, 315, 5).

The election of Franklin Roosevelt and the 73d Congress in 1932 appeared to confirm the seemingly fixed role a solid Democratic presence in the South played as the region’s hegemonic political institution

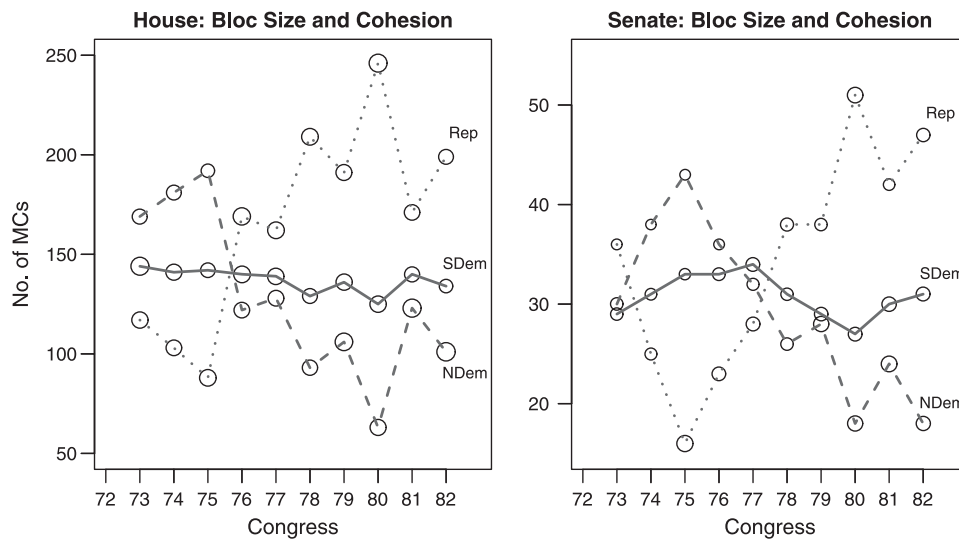
and as a leading established force within the national party. Broadly united in opposition to the Republican Party, the South’s one-party system had propelled the Democratic Party in most presidential and congressional elections since Reconstruction and had served in Washington as a source of protection for white supremacy. “Two party competition,” Key famously observed, “would have meant the destruction of southern solidarity in national politics Unity on the national scene was essential in order that the largest possible bloc could be mobilized to resist any national move toward interference with southern authority to deal with the race question as was desired locally” (Key 1949, 8–9). The protection of the white South’s regional interests depended on the ability of the region’s representatives to behave as a voting bloc on par with Republicans and with its copartisans to the North, and on its capability to produce and advance coalitions that could support ambitions to develop the country’s poorest section while blocking legislation that seemed to threaten its racial order. Under such circumstances, did the South compose a pivotal bloc?

A felicitous balance in the distribution of partisan and geographic features of the era’s patterns of representation underpinned the region’s congressional capacity. As Figure 1 shows, at the start of the New Deal, Democratic majorities in the House and Senate were characterized by a preponderance of Democrats from outside the region. Southern representatives constituted a minority of the majority, without whom the party majority could not govern. Later, during the second half of the period we consider, starting in the 76th House and the 77th Senate, southern members commanded the majority of seats amongst congressional Democrats, both when the party maintained control of the House and Senate, and during the Republican 80th, when they, like other Democrats, were not essential to the achievement of majorities in either chamber. This pattern of southern domination inside the Democratic Party persisted through the end of the Truman Administration, with southern Democrats demonstrating cohesive voting comparable to nonsouthern Democrats and Republicans.

Given the balance of forces in Congress, these Democrats comprised a pivotal bloc with abilities at least as substantial as those of Republicans and their nonsouthern compatriots in each New Deal and Fair Deal Congress but the 80th. We can gauge this structural capacity with a measure of the coalitional pivotality that identifies when, and on which issues, southern Democrats had the potential to play a pivotal role on individual roll calls. To make this assessment, we use an indicator variable that

⁶This is not the standard definition of the South in congressional studies, which, like Key, treat the 11 ex-Confederate states, or, more commonly add Oklahoma and Kentucky to make a region of 13 states. We choose our 17-state approach in order to capture the full place of segregation as a boundary condition for political behavior in the legislature. But, like any such choice, it comes with a price. The broader the definition the more likely the region will meet tests of pivotality. In turn, though, the broader definition offers a harder case than narrower approaches when it comes to finding instances of low likeness within the Democratic Party. Further, it might be expected that a 17-state South, as distinct from a smaller region, would demonstrate less cohesion as a bloc. But in fact these differences are not large. To take one telling measure, V.O. Key, Jr. sampled sessions during the 1933–45 Congresses to discern an 11-state southern Rice cohesion score of 70.4 in the House (calculated as the absolute difference between the percentage of members of a defined group who favor or oppose a given roll call [Rice 1925, 1928]). When we replicate this measure using all roll calls, we find a nearly identical cohesion score of 70.2 for the 11-state South. When we expand the ken to a 17-state South for the same period, aggregate southern cohesion declines, but only slightly, to 67.4.

FIGURE 1 Bloc Composition and Cohesion by Congress



Note: Size of each bloc is indicated by the lines (southern Democrats [solid line], nonsouthern Democrats [dashed line], Republicans [dotted line]). The points are sized in proportion to the cohesion of each bloc in each Congress.

simultaneously considers the character of contestation on a roll call and the size of the southern Democratic bloc, designating the bloc as “pivotal” on a particular roll call if the other two blocs (nonsouthern Democrats and Republicans) did not achieve a majority on the roll call *and* if there were enough members of the southern Democratic bloc to potentially impact the vote outcome. In the Senate, with its filibuster possibility, we make an additional designation for roll calls according to the then-required two-thirds cloture vote. We determine, then, that where yDn and yR are the numbers of nonsouthern Democrats and Republicans who cast yea votes on a roll call, and Ds is the total number of southern Democrats in the chamber, southern Democrats constitute a structurally pivotal bloc on a roll call if (a) for a simple majority: $[yDn + yR < 0.5 * \text{total votes cast}] \text{ AND } [0.5 * \text{total votes cast} - (yDn + yR) - Ds < 0]$; and (b) for a cloture vote: $[yDn + yR < 0.67 * \text{total votes cast}] \text{ AND } [0.67 * \text{total votes cast} - (yDn + yR) - Ds < 0]$ on those roll calls on which nonsouthern Democrats and Republicans achieved a winning majority $[yDn + yR \geq 0.5]$. According to this measure of conditional pivotality, southern Democrats constituted a consistently pivotal bloc over the entire time period, with the capacity to influence the outcome on a majority of the roll calls taking place in the House and Senate (save the 80th Congress in the House) and the capacity to block over 80% of those votes on which non-

southern Democrats and Republicans had achieved a winning majority (see Figure 2).

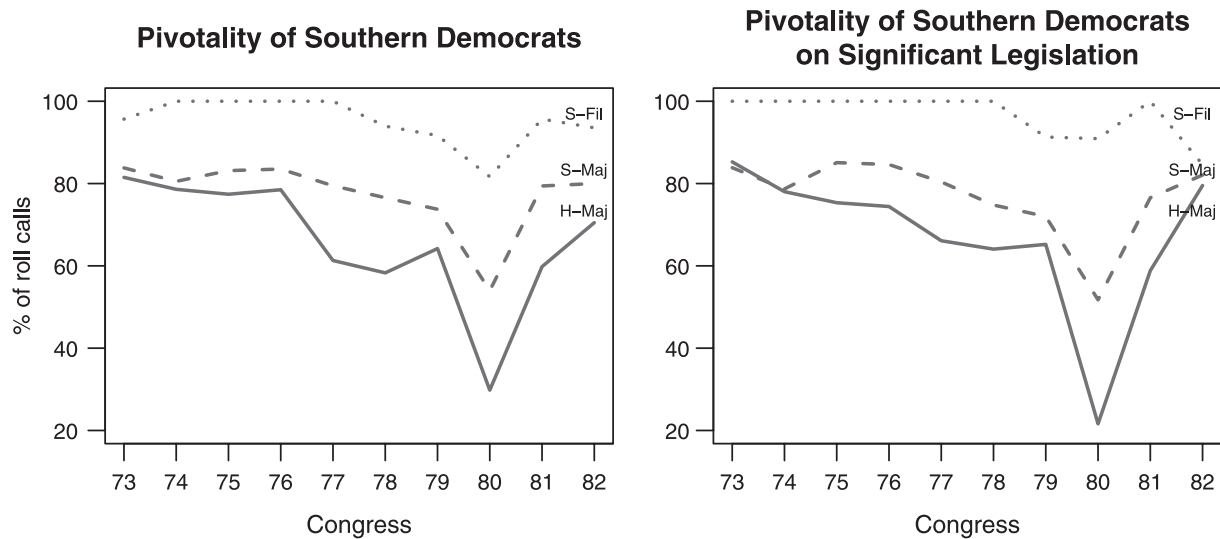
What is especially striking at this moment of American political history, in short, is the extent to which the quasi-party of southern Democrats possessed a capacity to alter the outcome of a large majority of the roll calls. Even more, southern members possessed this capacity with respect to the era’s most significant legislation. Utilizing a measure of the importance of lawmaking developed by John Lapinski (2008) that assigns a score to each public statute drawn from several empirical markers, we designate as “significant” the period’s 100 top-rated legislation. Regarding such significant bills, the South was pivotal to the passage or blockage of an overwhelming majority of the roll calls on landmark legislation (save for the 80th House).⁷

Research Decisions

With southern Democrats achieving structural pivotality during this era, each congressional bloc needed coalitional allies to pass any legislation. Our

⁷Compared to the other two blocs, across the period southern Democrats were the most pivotal regarding significant legislation. On such roll calls, the South was pivotal on 67% in the House and 77% in the Senate; nonsouthern Democrats were pivotal on 63% of such votes in the House and 72% in the Senate; Republicans were pivotal on 56% in the House and 61% in the Senate.

FIGURE 2 Coalitional Pivotality, by Roll Call



Note: Percentage of roll calls on which southern Democrats achieved majoritarian pivotality in the House (solid line) and Senate (dashed line) and filibuster pivotality in the Senate (dotted line), in the 73rd-82nd Congresses.

central questions concern the form and content of these coalitions. The key actor in these circumstances was the most pliable group of representatives, the quasi-party of southern Democrats who simultaneously were partisan players and fierce protectors of their regional interests. Suspended in this field of tension, these representatives not only had the capacity, but the propensity to constitute a pivotal voting bloc that would prove essential to New Deal lawmaking. The behavioral questions thus raised concern when, and with regard to which issues, southern members of the House and Senate resolved their inherently cross-pressured circumstances on the basis of party; and when, and with regard to which issues, their regional preferences were triggered sufficiently to overwhelm party loyalty and broadly liberal ideological propensities.

To uncover these patterns and ascertain how they developed over time, we classify each roll call both substantively, utilizing the Katznelson-Lapinski classification scheme,⁸ and by organizing roll calls into

four types of votes—partisan, cross-partisan, sectional, and disloyal.

The multitiered coding scheme that categorizes votes by policy type is composed of three nested tiers. Each offers more particularized policy detail than the previous tier, which makes it possible to analyze patterns at different levels of aggregation (for fuller discussions, see Katznelson and Lapinski 2006; Lapinski 2008). Each roll call in the House and Senate is assigned a code in *Tiers One, Two, and Three*. *Tier One* designates four basic elements common to policies in all modern states. The first category is *sovereignty*, the cluster of policies that bear directly on the state's indivisible claim to rule legitimately over particular people and places and thus is concerned with the very existence, boundaries, and membership of the national regime. The second, *organization and scope*, concerns the substantive reach, range of activities, and institutional elaboration of the national government's instruments for governing, including its basic constitutional rules, norms, formal organization, and terms of political participation. The remaining two categories in the first tier of coding concern the outputs of government. *International relations* refers, of course, to the geopolitical and economic transactions between the United States and other sovereign states and the international system, while *domestic affairs* concerns public policies that shape the ties between government and the economy and between government and the welfare of its citizens.

⁸Summarized online in Appendix A. Other earlier coding schemes map the policy terrain of congressional roll calls and place the categorization of public policy at the center of their research agendas (Baumgartner and Jones 1993; Brady and Stewart 1982; Clausen 1967, 1973; Peltzman 1984). The classification we deploy was developed in part to overcome several weaknesses in these earlier schemes, particularly the overaggregation of policy categories that often are period specific (Katznelson, Geiger, and Kryder 1993; Katznelson and Lapinski 2006).

The second tier divides each into three or four “blueprint” subcategories. Thus, *sovereignty* in a representative democracy entails decisions about liberty, membership, and the demographic composition of the nation, civil rights, and physical boundaries. *Organization and scope* in such a regime is composed of decisions about constitutional structure, governmental organization, and rules of political representation. *International relations* divides into the triad of defense, geopolitics, and international political economy, while *domestic affairs* partitions into policy judgments about agriculture, planning and resources, political economy, and social policy. These distinctions still are not fine-grained enough for many analytical purposes. These classifications are further broken down into 70 inductively created substantive codes, with each second tier category subdivided into two to thirteen *Tier Three* substantive and mutually exclusive classifications that compose the most fine-grained level of policy classification.

The second way we categorize our data maps the location of every substantively based roll call in each Congress in scatterplots that are organized by two measures: likeness between southern Democrats and nonsouthern Democrats (displayed on the horizontal axis) and likeness between southern Democrats and Republicans (displayed on the vertical axis), designating the conventional definition of elevated likeness as a Rice score of 70 or above to set the boundaries of the four categories.⁹ The positioning of the roll calls is spatially arrayed in an upper-right “Cross-Partisan” quadrant in which southern Democrats vote similarly to both nonsouthern Democrats and Republicans; a lower-right “Partisan” quadrant in which southern Democrats join their party in opposing Republican voting; a lower-left “Sectional” quadrant where southerners stand apart from both nonsouthern Democrats and Republicans, remaining separate on regional concerns; and an upper-left “Disloyal” quadrant, where southern Democratic

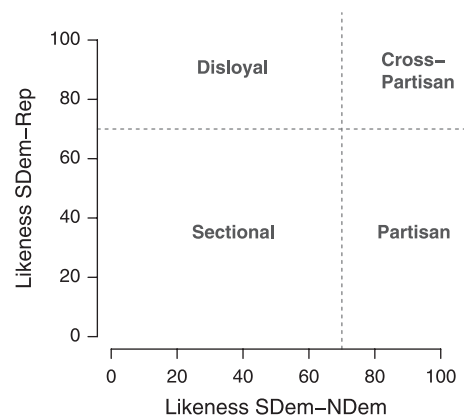
voting behavior differs from other members of their party and aligns with Republicans (see Figure 3).

Employing this typology to capture patterns of change in southern congressional voting behavior during the New Deal period, we probe four principal questions: (1) How did the location of southern voting alter over time, especially at key moments of change and transition? (2) What was the content of votes that were marked by sectional or, especially, defection voting by southern Democrats? (3) Were southern members pivotal voters on these roll calls? (4) Did votes in the two left quadrants concern significant lawmaking, where party pressures arguably were greatest?

An Inflection in Time

Our analysis begins in 1933 with the 73rd Congress (which includes the legislative avalanche of the first 100 Days)—a moment marked by considerable partisanship. As members of the newly elected majority, southern Democrats voted alongside nonsouthern Democrats at this early moment to pass landmark New Deal legislation. Democratic members voted with high similarity on the vast majority of roll calls in the House and Senate in a display of party loyalty

FIGURE 3 Typology of Southern Roll-Call Behavior



Note: Likeness scores between southern Democrats and nonsouthern Democrats (on the horizontal axis) and between southern Democrats and Republicans (on the vertical axis). The dotted gray lines mark a likeness score of 70. A roll call that falls above or to the left of the dotted gray lines indicates that the two blocs under comparison voted with low likeness on that roll call.

⁹Rice's likeness scores are calculated by subtracting the differences in the percentages of “yea” votes cast by two voting blocs from 100 (Rice 1925, 1928). A high likeness score above 70 indicates that the two voting blocs under comparison voted similarly on a roll call. This simple instrument has well-known limits. It is agnostic about sources of roll-call behavior (Krehbiel 1993, 2000), which might include party pressures and the predilections of representatives. It lacks an inherent baseline set of expectations (Weisberg 1983). It also fails to distinguish party from bipartisan votes (Hammond and Fraser 1982; Shade et al. 1973). Yet, as Key (1949) and many others have shown, such scores can be revealing of coalitions and their character in historical context. They also possess the advantage over most other measures of being “experience-near,” thus comprehensible both to actors and observers.

captured by the large pools of roll calls located within the Partisan and Cross-Partisan quadrants of Figures 4.1 and 4.2.¹⁰ Of these roll calls displaying high cross-regional Democratic voting, only a small portion were attributed to “cross-partisan” roll calls on which southern Democrats, nonsouthern Democrats, and Republicans voted similarly. Rather, southern and nonsouthern Democrats voted together to oppose Republicans on 73% of these roll calls in the 73rd House and 58% in the 73rd Senate—evidenced by the dense collection of roll calls falling within the Partisan quadrant in each chamber.

Roll-call voting in the first New Deal Congress, in other words, was largely defined by partisanship. The southern and nonsouthern blocs of the Democratic party united against the members from the Republican bloc, with only a few roll calls venturing into the Sectional and Disloyal quadrants. This pattern continued through much of the early New Deal period with southern Democrats diverging from nonsouthern Democrats on fewer than 13% of roll calls in any of the first four New Deal House and Senate Congresses, as represented by the extreme bias of roll calls grouped on the right-hand side of that moment’s scatterplots.

But this did not prove to be a stable pattern. Rather, this early New Deal coalitional configuration changed dramatically, with several breakpoints marking the evolution of southern bloc behavior in the two chambers. First, even as southern Senators continued to engage in primarily partisan voting through the 77th Congress, southern Democrats in the House began to disengage from their coalitional relationship with nonsouthern Democrats, with low party likeness characterizing their votes on more than one-in-five roll calls. As southern members began to behave less reliably as party voters, two patterns emerged. First, southerners began, on occasion, to find new coalitional allies with members of the Republican Party. By the 76th House, the proportion of roll calls within the Disloyal quadrant (7.2%) nearly doubled that in the 75th as southern Democrats voted increasingly with the Republicans. But more significant and substantial at this moment was the sudden and dramatic accumulation of roll calls in the Sectional quadrant. On these roll calls, southern members broke away as a distinct and independent bloc, diverging both from Republicans and their copartisans nearly 12% of the time in the 77th House.

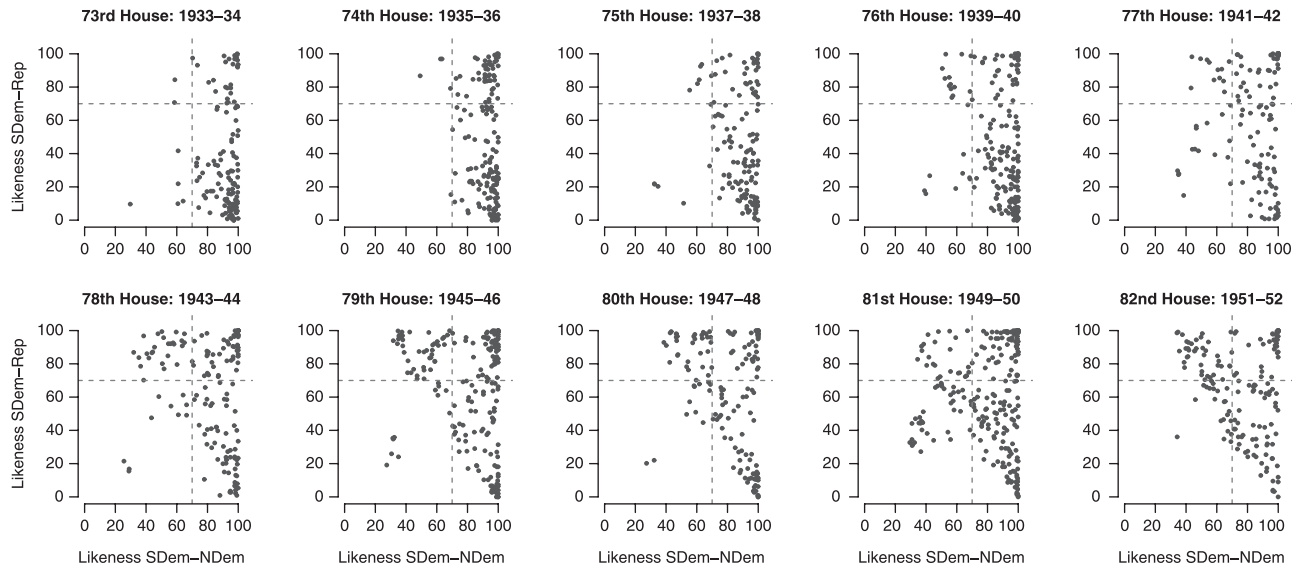
Southern Democrats in the House, in short, had begun to shed some partisan loyalty in favor of regional preferences.

By the 78th Congress, sectional stress within Democratic Party nearly reached the same level in the Senate as in the House. Low likeness defined Democratic voting on nearly a quarter of House and Senate roll calls. This pattern marked a dramatically different configuration than that which existed at the start of the New Deal, with a quadrupling of low party-likeness voting as compared to the 73rd Congress. By this time, moreover, southern Democrats were no longer primarily voting in a purely sectional manner when they deviated from nonsouthern Democrats. Rather, in both the 78th House and Senate, the Disloyal quadrant became a reservoir for a massive deluge of roll calls as southern Democrats—quite suddenly and considerably—began to ally with Republicans in proportions that far exceeded any previous New Deal Congress. During this Congress—which falls in the middle of the period we are considering—southerners joined with Republicans on 15% of roll calls in the Senate, and 17% in the House. Previous defection rates reached 2% in the 77th Senate and 9% in the 77th House.

Even more striking was the noteworthy quality of the votes now clustered in the Disloyal quadrant. In the 78th House, southern votes were pivotal to the outcome of a majority (56%) of votes falling within the Disloyal quadrant, and fully 82% pertained to one of the 100 most significant pieces of legislation passed during the New Deal period (compared to 41% across all the quadrants).¹¹ Votes on landmark legislation, therefore, fell disproportionately in the Disloyal quadrant, with southerners breaking away from their copartisans and defecting to the Republican party. Southern behavior likewise was important to lawmaking in the 78th Senate. Southern votes were pivotal for 94% of votes located in the Disloyal quadrant (compared to 77% for all the quadrants). Further, these were important ballots; 65% of the South’s Disloyal votes pertained to significant legislation (compared to 55% in all the quadrants). More than mere position taking, southern Democratic defection built winning coalitions with the Republican opposition and shaped lawmaking, resulting in decisive contributions to the outcomes of significant legislation.

¹⁰See online Appendix B for a figure displaying the percent of roll calls falling within the quadrants for each Congress.

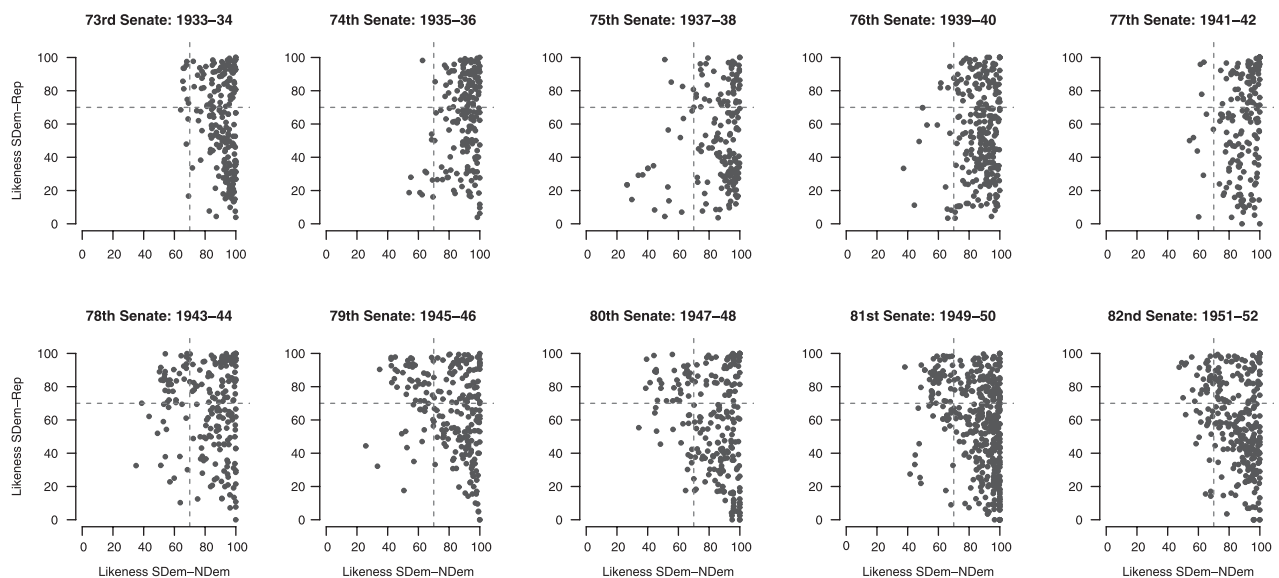
¹¹Online Appendix D provides a complete accounting of the pivotality and significance measures for each quadrant, by Congress.

FIGURE 4.1 Southern Roll-Call Behavior, by Congress

Note: Likeness scores between southern Democrats and nonsouthern Democrats on the horizontal axis, compared to those between southern Democrats and Republicans on the vertical axis, for all roll calls in the 73rd–82nd House.

This transformation of the coalitional behavior of the southern bloc gained further momentum in the House. By the period's end, in the 82nd Congress, southern Democrats diverged from nonsouthern Democrats on over one-third of the roll calls. By contrast, southern alignment with the Republican bloc gradually diminished in the Senate, where southern

Democrats returned, if modestly, to the partisan fold in the Republican 80th Congress, and then voted increasingly like their fellow party members through the end of the period. The party loyalty of these southern Senate members, however, never returned to a rate approaching those that characterized the pre-77th Congress phase of the New Deal. Until the end of

FIGURE 4.2 Southern Roll-Call Behavior, by Congress

Note: Likeness scores between southern Democrats and nonsouthern Democrats on the horizontal axis, compared to those between southern Democrats and Republicans on the vertical axis, for all roll calls in the 73rd–82nd Senate.

our period, southern Democrats remained the wild card, shifting between coalitional voting with the Republicans and nonsouthern Democrats.

An Inflection in Substance

The temporal features of New Deal roll-call behavior challenge us to understand the conditions under which southern Democrats, occupying a structurally pivotal position, chose to significantly increase their propensity to break with fellow Democrats and with the normatively and substantively median positions of their political party. Not until the partial and uneven partisan defection of southern Democrats starting in the 77th and 78th Congresses did they emerge, in practice, as a distinctive quasi-party, caught in the cross-fire between party loyalty and regional preferences. This development invites attention to why this change in southern congressional voting occurred so precipitously during the 77th and 78th Congresses. What issues motivated the decision of so many southern members at that moment to exercise their pivotal capacity by joining with Republicans in opposition to the substantive position of their own party's leaders?

To bring clarity to this transformation, we turn to an identification of the substantive bases of the breakpoints in southern roll-call behavior. Which issues began to divide the Democratic Party by section? How did the content of policy affect the ways southern members balanced their partisanship and their preferences?

We thus track the issues on which southern Democrats allied with Republicans, engaging in partisan voting on some roll calls and pursuing overriding regional preferences on others. The transformation of the southern bloc from a loyal party voter to a potential defector, we argue, was defined first and foremost by the region's fear that local control of its racial order was under attack. Positioned at the intersection of partisan and regional concerns, southerners exercised their pivotal capacity to form new coalitions that, they believed, could better protect their regional interests. On roll calls that directly and, over time, indirectly threatened that control, southerners parted from their party, at first standing largely alone on race issues, but later finding willing Republican allies.

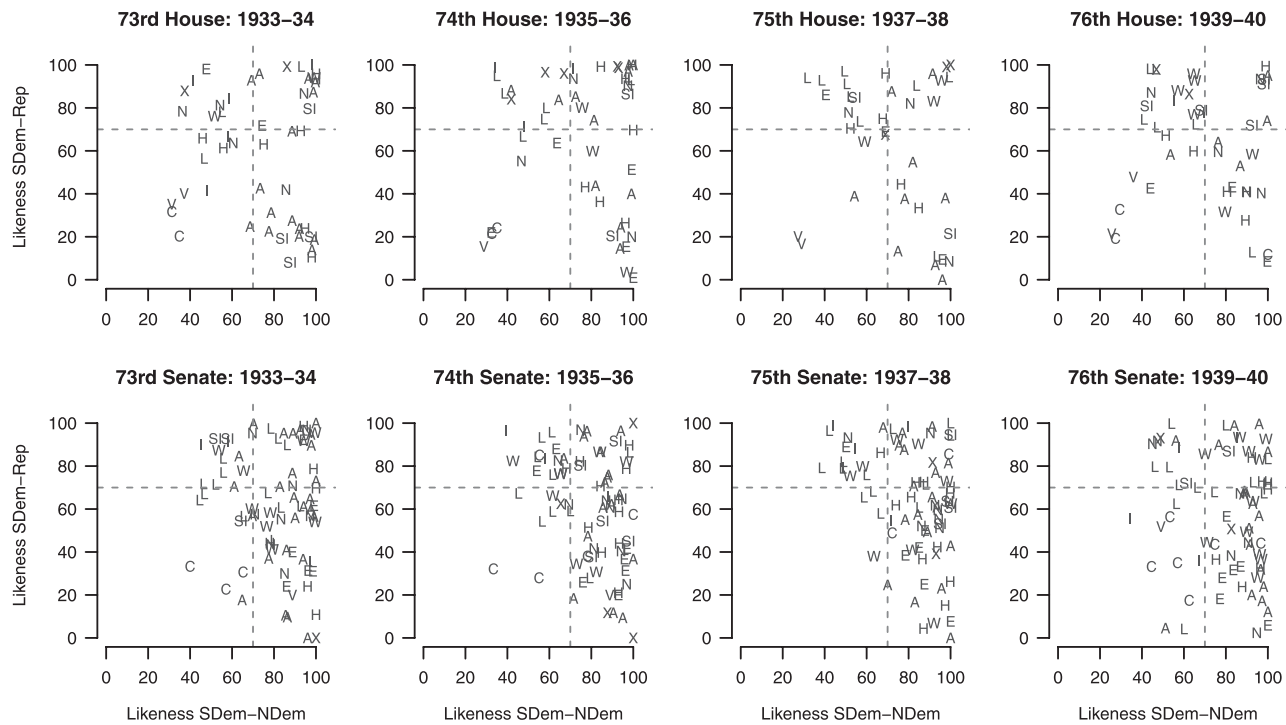
On the heels of the 1932 election, Democrats proposed massive economic reforms that they trusted would lift the nation out of a major economic depres-

sion. Southern Democrats, eager to recover their own region's depressed economy and enjoy the benefits of membership in the newly elected majority party, voted with nonsouthern Democrats to enact fiscal economic measures and experiment with corporatist and centralized planning models, policies that conflicted with the Republican party's more conservative positions on deficits and government intervention in the economy. But even at its earliest moments, when southern Democrats remained loyal to party positions on the vast majority of issues, their behavior manifested some distinctive features. This variation can be observed even in the four broad substantive categories contained in *Tier One*. While Democrats voted with high likeness on roll calls pertaining broadly to international relations, government organization, and domestic policy during the first four New Deal Congresses, southern Democratic voting diverged on issues pertaining to "sovereignty" (see online Appendix C).

Moving to more fine-grained levels of our classification, we can see that most of these roll calls concerned civil rights for African Americans.¹² Located squarely in the sectional quadrant, as Figure 5 shows, southern Democrats stood alone on most of these roll calls—roll calls which met the test of significant legislation more than 90% of the time—not only voting separately from the rest of the Democratic Party, but from Republicans as well. At this early moment, southern voting crisply divided most of the time between how the region's representatives opted to join the rest of their party regarding substantive questions that lay along a left to right continuum, and how they acted alone, striking a defensive posture, regarding the minority of issues that directly and unambiguously concerned race and region. Coherent party government dominated outside the ken of civil rights.

Even during these initial New Deal Congresses, southern unease sometimes transcended this bounded policy area as members began to evaluate other substantive questions in terms of their racial concerns. While voting on labor issues, for instance, was relegated largely to the partisan and cross-partisan quadrants in the 73rd and 74th Congresses, southern Democrats in the House began to defect from the rest of their party, voting more closely with Republican members on 71% of labor votes in the 75th House, and on 90% in the 76th House. Wary of the potential social and economic

¹²Online Appendix E presents a full table of the percent of roll calls falling in the Sectional and Disloyal quadrants by the policy classifications in each substantive tier.

FIGURE 5 Southern Roll-Call Behavior: Prominent Issues, 1933–38

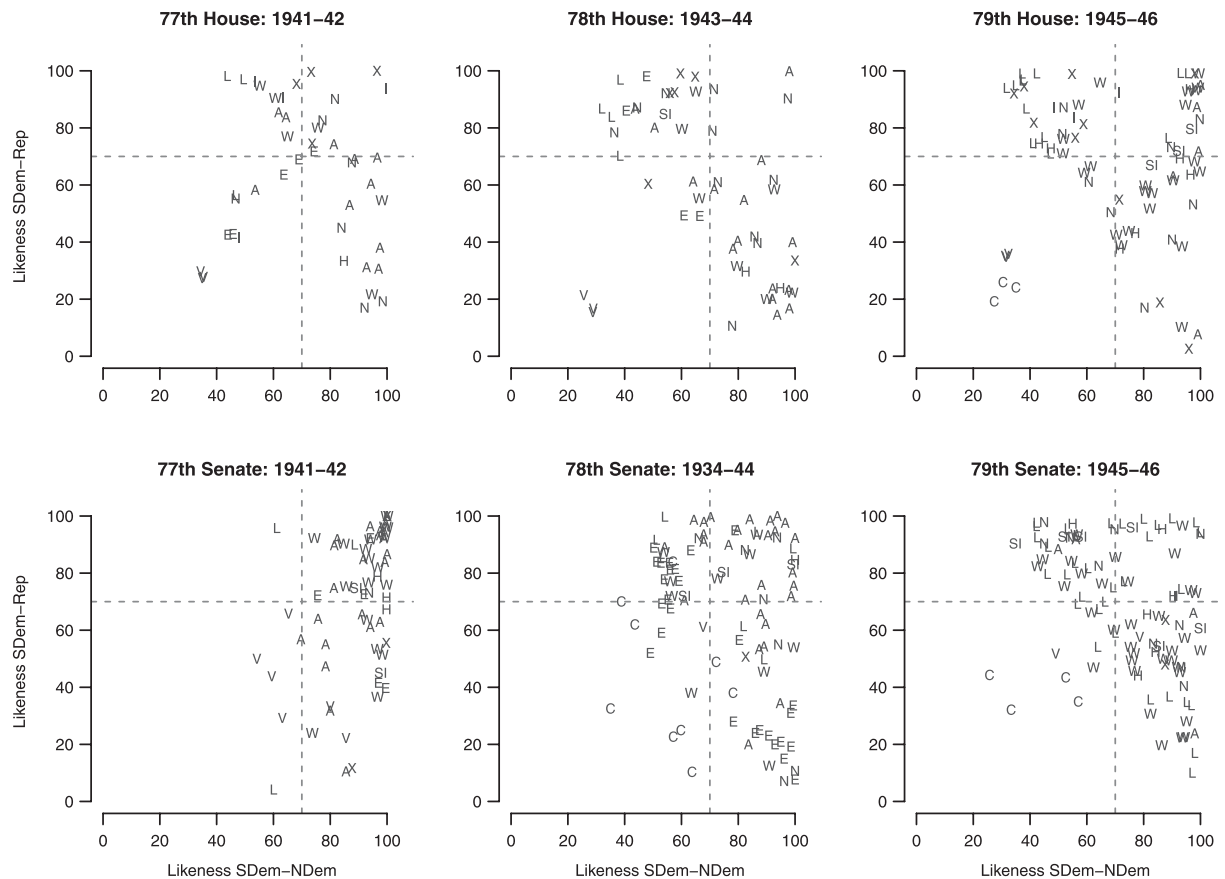
Note: Likeness scores between southern and nonsouthern Democrats on the horizontal axis, compared to those between southern Democrats and Republicans on the vertical axis for all roll calls in the 73rd–76th Congresses. Selected policy issues are labeled: agriculture/farmer support (A), civil rights for African-Americans (C), elections (E), expression/loyalty (X), housing (H), immigration (I), labor/unions (L), national resources (N), social insurance (SI), voting rights (V), wage and price controls (W).

impact that unionization and the federal regulation of labor practices could have on the established southern racial order (Farhang and Katznelson 2005), southern House members began to express these concerns indirectly through their voting on labor issues. By the 79th Congress, southerners in the Senate also were deserting the party position on a majority of such votes, partnering with Republicans to form a coalition against the interests of what by then had become a formidable labor movement.

More than any other issue, labor questions generated the shift of southern Democrats from a structural to an actual pivot. While southern Democrats in the early years of the New Deal singularly opposed civil rights initiatives, they began to regularly join Republicans on antilabor votes for the first time, departing from their party's position on a policy issue central to the Democratic coalition. Crucially, of the labor votes falling in the Disloyal quadrant in the 75th to 79th House and 79th Senate, a vast majority (93%) pertained to significant legislation. Further, southern decisions on these roll calls were overwhelmingly pivotal, reaching 87% in the House and 93% in the Senate. This area of policy, so

central to the region's low wage and racialized political economy, proved a wedge. It showed southern Democrats that when New Deal policies outside the boundary of civil rights might affect their region's race relations they could successfully join with Republicans to oppose enactment. By the middle of the extended New Deal period, as Figure 6 shows, this range of policy issues grew well beyond labor as the degree to which southern Democrats defected from the party position dramatically expanded. In the face of policy proposals to grant the federal government greater regulatory capacity and enhanced control over entitlement programs, the South increasingly abandoned earlier partisan voting proclivities and voted to protect its regional power by forming voting coalitions with Republican members.

A powerful exogenous factor, American participation in World War II, produced a growing assertiveness of organized labor in the South and heightened African American restlessness about their racial condition (see Farhang and Katznelson 2005; Katznelson 2005). These developments forced southern members to choose ever more uncomfortably between partisanship and racial preferences. In these

FIGURE 6 Southern Roll-Call Behavior: Prominent Issues, 1941–46

Note: Likeness scores between southern and nonsouthern Democrats on the horizontal axis, compared to those between southern Democrats and Republicans on the vertical axis for all roll calls in the 77th – 79th Congresses. Selected policy issues are labeled: agriculture/farmer support (A), civil rights for African-Americans (C), elections (E), expression/loyalty (X), housing (H), immigration (I), labor/unions (L), national resources (N), social insurance (SI), voting rights (V), wage and price controls (W).

circumstances, southerners came to see racial concerns as embedded within a range of New Deal proposals beyond civil rights legislation, thus extending the scope of issues on which they were significantly cross-pressured.

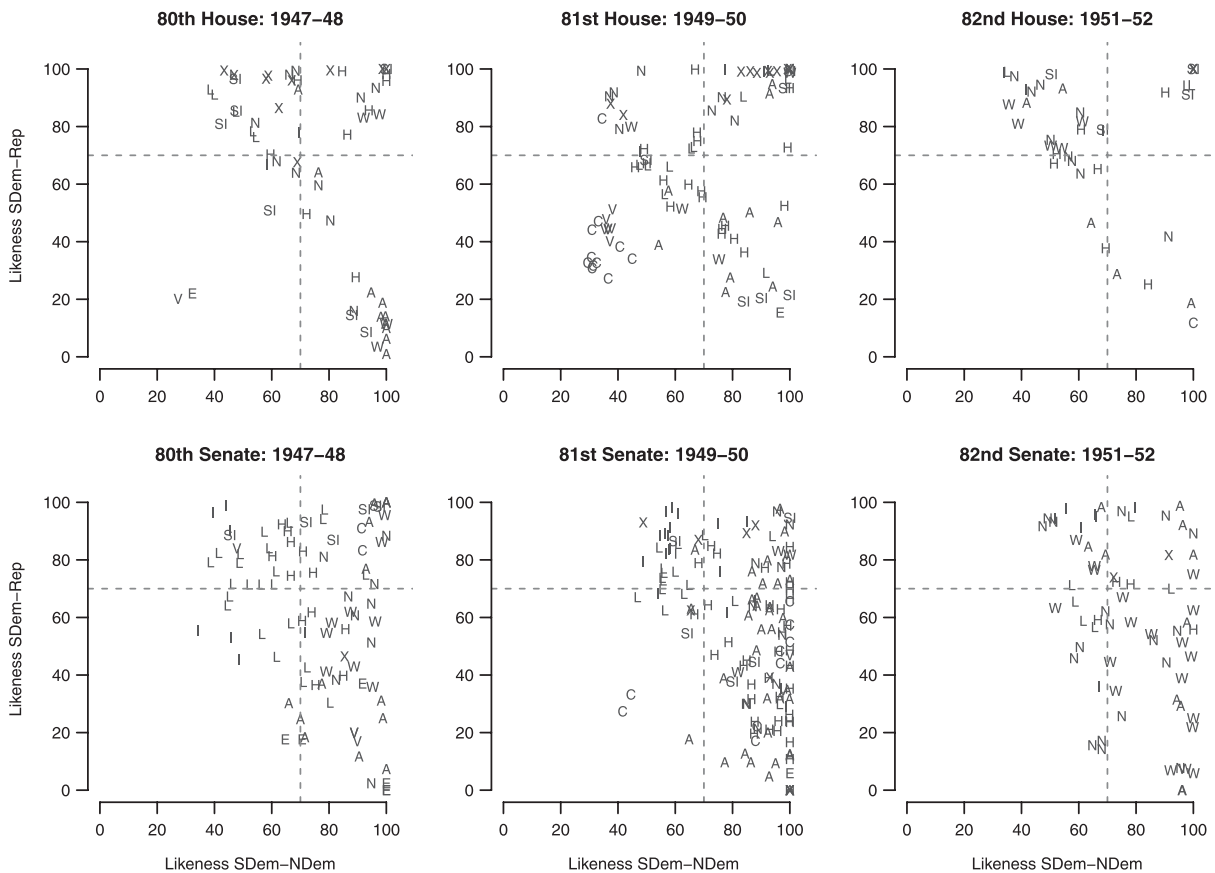
The scope of southern defection extended both in the House and Senate to include New Deal policies that concerned the subsidization of agriculture and the regulation of its work force; wage and price controls on products central to the southern economy; the federal disbursement of unemployment compensation and job placement activities;¹³ national resource issues at stake in the government's seizure and regulation of war production plants; the nationalization of absentee ballots for soldier voting; loyalty investigations during the war that included

charges of Communist influence in CIO unions; and roll calls concerning the House Un-American Activities Committee. Torn between New Deal legislation that called for an enhanced federal role on a wide range of social and economic issues and regional interests in maintaining a racialized “way of life,” southern Democrats prioritized their regional preferences in a growing constellation of policy areas. As Figure 6 shows, southern Democrats split from the rest of the party on these policy issues starting in the 77th House and 78th Senate, even as they remained loyal to the Democratic Party on other policy questions.

This trend persisted well into the Truman Administration (see Figure 7). Southern and non-southern Democratic roll-call behavior diverged more widely and with greater frequency. Low likeness inside the Democratic Party in the House occurred on virtually half of domestic policy roll calls in the 82nd Congress. This heightened partisan tension was due in part to southern Democrats

¹³For a discussion of southern interests in keeping such disbursements at state and local—rather than national—level, see Katznelson (2005).

FIGURE 7 Southern Roll-Call Behavior: Prominent Issues, 1947–52



Note: Likeness scores between southern and nonsouthern Democrats on the horizontal axis, compared to those between southern Democrats and Republicans on the vertical axis for all roll calls in the 80th – 82nd Congresses. Selected policy issues are labeled: agriculture/farmer support (A), civil rights for African-Americans (C), elections (E), expression/loyalty (X), housing (H), immigration (I), labor/unions (L), national resources (N), social insurance (SI), voting rights (V), wage and price controls (W).

splitting with their party more frequently on some of the same issues that had provoked partisan tensions in the wartime Congresses. Southern partisan divergence on policy concerning national resources and wage and price controls, for instance, topped off at a rate higher than 89% in the 82nd Congress, while labor questions continued to generate a large proportion of the intrapartisan tension in the House, especially during the Republican-dominated 80th Congress that passed the Taft-Hartley Act over President Truman's veto, when southern Democratic votes were necessary to override. But this surge of sectional stress in the postwar period also grew in response to other policy proposals like job placement and the potentially non-discriminatory provision of public housing and hospitals that southern members came to believe would threaten local southern control.

There were long-term consequences. The mass partisan change that originated in the policy deci-

sions taken by southern members in the House and Senate during the second half of the period we consider and the resulting partial independence of the South's elected representatives from their party caucus altered the conditions for electoral competition. These, we now know, provided first steps for an extended process that ultimately produced a dramatic southern political realignment.

Discussion: On Party and Preferences

Was the South pivotal? Emphatically yes, and well beyond the region's impressive structural capacities. Acting as it did, the South altered the vectors of lawmaking, including the era's most significant policy decisions. When, and about what, was the region pivotal? By identifying answers, our analysis has

pinpointed the moments and the substantive concerns that ultimately detached most of the white South from the Democratic Party. In addition to its historical significance, our account offers a vantage on what has been a robust theoretical debate. Much contemporary congressional literature has been shaped by disagreement about whether lawmaking reflects the preferences of individual members who possess well-ordered and rather fixed locations on an ideological map, or the positions of the two competing, if sometimes internally heterogeneous, major parties. The preference-centered position designates members of the House and Senate as autonomous actors who cluster around a median position. The party-centered position underscores how party leaders can compel obedience by utilizing advantages conferred by an array of institutions and incentives that promote organizational deference and loyalty to party positions even when these might be at odds with the preferences of individual members.

There is a long research tradition that privileges political parties and studies partisan similarities and differences. Classic books such as David Truman's *The Congressional Party* (1959) and David Mayhew's *Party Loyalty among Congressmen* (1966), joined by hundreds of learned studies have taken the centrality of parties as a given. With parties offering brand names, reputations, signals of predictability, agenda control, and sets of material and normative inducements, their capacities to discipline potentially heterogeneous and chaotic legislatures long has been thought to be at the core of coherent, credible, and legitimate substantive representation. More recent efforts to formalize and test partisanship's structuring, disciplining, and organizing roles, and to extend the long-standing position that parties matter most for understanding and predicting legislative behavior, signify important, but not drastic, intellectual advances (Aldrich 1994; Aldrich 1995; Aldrich, Berger, and Rohde 2002; Aldrich and Rohde 1997, 2000, 2001; Aldrich, Rohde, and Tofias 2007; Cox and McCubbins 1993, 2005; Rohde 1991).

By contrast, the deep skepticism signaled by Keith Krehbiel's "Where's the Party?" (1993) was remarkably heretical. Of course, there is older work on the electoral connection and the "home style" of legislators that stresses the importance of constituency and the ways a homology of views linking members and their districts can transcend or supplant party loyalties (Fenno 1978; Mayhew 1974). But Krehbiel's claim that what appears as party behavior actually is a reflection of individual legislator preferences burst on the scene as a radical challenge.

The most persuasive reproach he mounted to party models concerns the two "conditions" posed

by conditional party government: the existence in a two-party game of a crisp cutpoint that distinguishes the preferences of members of one party from those of the other, and the homogeneous composition of preferences in each party (see the figure in online Appendix F). When these two related circumstances hold, parties, it is predicted, behave appreciably and meaningfully as units of action. But in such situations, Krehbiel insists, parties do not add analytical value (Krehbiel 1999, 33–35). The questions we have asked follow from the paradox he poses: "Parties are said to be strong exactly when, viewed through a simple spatial model, they are superfluous," and, reciprocally, parties in fact are strong when they can maintain the voting loyalty of legislators who possess preferences that are distant from the party median and overlap with those of the opposing party (Krehbiel 1999, 35).

Though we agree that party strength cannot be appraised independently of preferences, we have not attempted to adjudicate the party versus preferences dispute. Nor do we offer a distinct regional or factional model as an alternative to these two approaches. We broadly share Steven Smith's view (2000) that well into the second decade of disciplinary debate the core issue remains unresolved in part because it is so difficult to isolate the effects of parties and preferences. After all, they are not hermetically sealed. Political actors self-select into parties, and parties manifestly help shape and organize preferences. Focusing on the South, we have sought to better understand and specify what happens when the distribution of preferences between the parties overlaps in a zone within which legislators are cross-pressured by party and preference. Southern members of the House and Senate lacked the formal organization or the leadership ladder of a political party, but possessed a hierarchy of salient and distinct preferences that facilitated tacit understandings, rhetorical signaling, and the coordination of strategies when their particular interests were thought to be at stake.

With sufficient size, members who fall within such an intersecting spatial location can constitute the legislature's pivotal group in circumstances when lawmaking depends on whether they resolve their cross-pressures of partisanship and preferences by staying faithful to their party. Asking when such quasi-parties appear, and offering a temporally and substantively grounded account of their content and behavior that is both situated and contingent, makes it possible to enrich portraits of legislative behavior

and its consequences, especially in conditions when a stark antinomy of party and preferences forces choices that analytically marginalize or dissolve such clusters of members as legislative actors.

On this approach, interactions between history and content at T_1 , are understood to shape the relationship between partisanship and preferences for such a bloc and thus determine when and how it might choose to exercise its structural capabilities. In turn, as a specific configuration of historical elements produce issue-specific roll-call behavior, new circumstances for legislative action at T_2 emerge. More abstractly, it is this dynamic pattern, going forward to T_n with no a priori assumption that each temporal shift will be just like the prior one, that is the hallmark of "situated partisanship," an analytical position that refuses to choose between preferences without party or parties as simply arrayed against each other on a single right to left dimension.

Conclusion: The South's Situated Partisanship

These considerations have guided our analysis of southern Democratic behavior during the Roosevelt and Truman Administrations. A focus on the South in this period reminds us that reflections on when and how partisanship shapes lawmaking are best transformed into a historical problem that can be investigated rigorously. Our foray from the early 1930s to the early 1950s reinforces the need to turn claims about the strength and capability of parties to designate and organize competing political positions into historical questions. The descriptive and substantive composition of political parties is not given or fixed; rather, it is contested and variable. Across the great swath of American history, the most deep-seated alternatives have contrasted genuinely national, bisectional, parties, like the antebellum Jacksonians, with nonnational regional parties, like the Republican Party until the past half-century, or the short-lived Dixiecrats. Party competition thus can be asymmetrical when it counterposes political parties that have the same analytical name but possess rather different qualities and content.

When parties are national in character—as Democrats were during the New Deal era, but Republicans were not—they have to internalize and control sectional differences. A crucial question for the party's decision-making procedures, selection of leaders, and policy judgments is how they manage the potential

emergence of coherent, geographically based blocs of members who latently compose quasi-parties that might act as a pivot both within the party and within the legislative chamber. Such groups are located at the intersection of party and a distinctive configuration of personal, constituency, and sectional preferences.

The approach we prefer, in short, situates partisanship in time and by subject. It does not assume a necessary symmetry between parties and preferences across partisan lines or treat parties and preferences as defining simply competing alternatives. To analyze the role of partisanship during the era we have studied, we have had to go beyond broad and abstract labels to consider the kind of parties these were, and how their qualities changed under the impact of important historical developments. We thus have sought to thicken the categories of "party" and "preference" by heeding how behavior varies over time, by policy subject, and by the peculiarities of the then-existing party system.

During these 20 years, older patterns of partisanship were put under stress by how southerners reconciled their preference for racial hierarchy with the advantages of party cohesion. Marked by a growing sectional stress within the Democratic Party and by a dramatic increase to the inclination of southern Democrats to join with Republicans to roll their own party, the era's lawmaking is explicable only if we attend to how particular policy questions at specific moments were perceived by southern Democrats for how they affected their region. The same issues acquired dissimilar meanings at distinctive moments, just as diverse policies induced different configurations of partisanship by the same members at a given time.

A focus on lawmaking sensitive to such concerns can provide a fruitful vantage from which to grapple with the intersection of party competition with race and region, arguably the greatest challenge to the liberal and democratic constitutional order. The Founders were obsessed with this problem. Their solution failed when the Constitution's arrangements that were intended to produce a cross-regional balance broke down when a majority came to power that opposed the extension of slavery without southern consent. Ever since, the clash between the social peace and social justice across lines of section and color has haunted the polity and has continued to be a fundamental aspect of the relationship between parties and preferences. For this reason, attention to the place of the South in Congress bids for enhanced attention.

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