

Congressional Candidates in the Era of Party Ballots

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Our article investigates the role of congressional candidates during the era of party ballots in nineteenth-century congressional elections. We examine how these candidates contributed to the overall quality of the party ballot and the means by which nationalization of elections served to mitigate candidate attributes. In our analysis, we take advantage of two unique features of elections during this era. First, election timing was quite variable before 1872, as many House races were not held concurrently with presidential elections. Second, House candidates' position on the ballot varied depending on whether a presidential or gubernatorial race was also being contested at the same time. To investigate these factors, we examine House elections prior to the adoption of the Australian ballot and find strong evidence of candidate effects during this period. Our findings raise important implications about candidate influence and electoral accountability in a more party-centered era.

Students of congressional politics generally agree that the adoption of the secret ballot in the late nineteenth century was instrumental in the rise of candidate-centered politics. With the elimination of the party ballot that had been in use for several decades, voters could more easily reward or punish individual elected officials or split their ticket since all candidates were listed on the same ballot (Katz and Sala 1996; Rusk 1970). Nevertheless, recent evidence suggests that the quality of individual candidates affected elections in earlier eras (Carson and Hood 2014; Carson and Roberts 2013). When coupled with growing evidence of an electoral connection in the nineteenth century (Bianco, Spence, and Wilkerson 1996; Carson and Engstrom 2005; Carson and Jenkins 2011; Finocchiaro and Jenkins 2016; Rogowski and Gibson 2015), these phenomena raise a variety of implications for existing accounts of electoral politics across time.

Our article examines the role of congressional candidates in the era of party ballots. We investigate how congressional candidates contributed to the overall quality of the party ballot and how the nationalization of elections affected the role of candidate attributes. First, the collective nature of the party ballot meant that both parties and candidates had an

interest in constructing the best party ticket they could (Carson and Roberts 2013). As such, congressional candidates who could help attract voters or even mobilize supporters had the potential to produce positive electoral returns for the party even if voters were not voting for them directly. Second, both nonuniform election dates and mid-term elections should condition the influence of national politics on congressional elections. In effect, the quality of individual congressional candidates should matter significantly more in these cases since voters were not simply making a choice based on which presidential candidate was at the top of the ticket. To examine each of these factors more systematically, we analyze House elections from five decades of the nineteenth century in which the party ballot was in use.

We believe that studying congressional elections outside of the modern era offers a unique degree of leverage in understanding how institutions structure political outcomes. In the contemporary setting, elections for national, state, and many local races are always held on the same day. The uniformity of election dates has been especially pertinent in recent elections (e.g., 2006, 2010) that have seemed to produce national “waves” in favor of one party or the other. The

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ability of some candidates to weather the political storm is often attributed to candidate-centered politics, which is thought to be a modern phenomenon. In the more partisan-centered era of nineteenth-century electoral politics, however, there were also notable instances in which candidates were able to avoid similar partisan tides (Carson et al. 2001). In the historical era, the diversity of institutional rules and practices in place at the time are critical for understanding how candidates could affect election outcomes even when voters were choosing between parties and not candidates. Furthermore, a more thorough examination of elections from earlier eras can offer insights about possible institutional changes and allows for comparisons to alternative electoral systems where parties dominate the process.

THE ERA OF PARTY BALLOTS

Congressional elections held during much of the nineteenth century were very different affairs from what we are accustomed to today (Bensel 2004; Burnham 1965; Kernell 1977). As Kernell (1977, 672) explains, “Our image of congressional elections during this period is one of fiercely combative affairs which by modern standards produced intense voter interest, large turnout, and close elections.” Unlike the modern era, relatively few legislators during this period viewed service in the US House as a long-term career. For the first few decades of the nineteenth century, most legislators would serve one or two terms in the House before exiting the chamber (Kernell 1977; Struble 1979). As such, it was not uncommon for elections in this era to dramatically reconstitute the membership of Congress. Over time, the average length of service in Congress began to gradually increase but did not exceed three terms until the beginning of the twentieth century (Polsby 1968).

Candidate recruitment practices in the early nineteenth century were also starkly different. In contrast to the familiar candidate-centered politics of today, political parties played a more influential role in elections held during this era (Aldrich 2011; Jacobson and Carson 2016). Prior to the emergence of primaries in the early twentieth century, local party caucuses selected House candidates (Dallinger 1897; Ostrogorski 1964). These caucuses were typically dominated by loose coalitions of state and local parties, who attempted to recruit candidates who were both loyal to the party’s cause and able to enlist additional followers for the party (Reynolds 2006). Given that congressional districts might represent a number of distinct communities with disparate interests, the nominating process for candidates could be arduous and cumbersome. “With few political organizations extending beyond their local towns and counties, district nominating caucuses were pluralistic, frequently frag-

mented affairs with each local organization sponsoring its own candidate” (Kernell 1977, 675).

During much of the nineteenth century, political parties exercised greater control over the balloting process than modern political parties. Political parties not only actively recruited and selected candidates to run for elective office, but they also structured the choices presented to voters.¹ When voters went to the polls on Election Day, they were given “party ballots” that were distributed by the parties rather than printed by state governments. Each party designed its own ballot to ensure that individuals were voting for the party’s slate of candidates. Moreover, voting during most of this era was not a private act. During the first several decades of the nineteenth century, voters’ decisions were made by voice vote. By the 1830s, voting occurred by paper ballot in most precincts but was still performed in the open where the party workers could observe individual voters’ choices. In this way, the local party organizations could carefully monitor the specific party ballot voters selected and ensure that they were selecting the “correct” slate of candidates (Bensel 2004; Rusk 1970; Summers 2004; Ware 2002).

Party ballots gave nineteenth-century parties a considerable advantage when it came to orchestrating electoral victories. When voters went to the polls, they were not given a choice between candidates for a specific political office. Rather, they were forced to select a ballot produced by one party or the other, which artificially enhanced the incidence of straight ticket voting (Engstrom and Kernell 2005; Rusk 1970). Voters could, in theory, cross out names in an effort to try to split their tickets, but such efforts were often discouraged by the public act of voting. Parties also went to great lengths to prevent voters from altering the ballot (Ware 2002).

ROLE OF CANDIDATES IN NINETEENTH-CENTURY ELECTIONS

To date, much of the existing research on the role of congressional candidates focuses on electoral politics in the post–World War II era. Indeed, two key determinants of congressional election outcomes—the emergence of quality challengers (Jacobson 1989) and the electoral returns to incumbency (Cox and Katz 1996; Gelman and King 1990; Jacobson 2015)—have been studied extensively throughout

1. Recent evidence suggests that nineteenth-century party organizations recognized the value in recruiting experienced or high-quality candidates as much as possible given the perception that a substantial number of races were winnable as reflected by measures such as previous incumbent vote share or presidential vote in the district (Carson and Roberts 2013).

the modern era. Although scholars have begun to document the importance of these factors in historical eras (Carson, Engstrom, and Roberts 2007; Carson and Roberts 2013), the conventional wisdom suggests that the role of individual candidates should matter far less under the party ballot. Scholars have argued that most nineteenth-century legislators were not interested in pursuing a career in Congress (Polsby 1968) and therefore lacked strong incentives to engage in behavior that is expected to benefit modern incumbents. Others claim that voters during this period evaluated candidates almost entirely on the basis of party affiliation rather than experience or legislative actions (Skeen 1986) and generally did not hold public officials accountable for their behavior in office (Formisano 1974; Swift 1987).²

The arguments for a more limited role for individual congressional candidates during this period is buttressed by research suggesting that the party ballot manufactured greater levels of voter responsiveness to the parties (Engstrom and Kernell 2005, 2014). Since the party ballot made split ticket voting difficult, if not impossible, voters were not selecting between different candidates as much as they were between different political parties (Rusk 1970). In discussing the importance of this institutional arrangement, Engstrom and Kernell (2005, 535) conclude that “coattail voting occurred by default” under the party ballot unless voters went to extraordinary lengths to split their vote.

Although arguments about the partisan and nonpersonal nature of voting under the party ballot are logical, they cannot fully account for recent evidence about the role of candidates in nineteenth-century congressional elections. In the context of the 1862–63 congressional elections, Carson et al. (2001) show voters held legislators accountable for both national conditions and district-specific factors, such as battle casualties during the course of the Civil War. There were even cases as far back as the antebellum era where voters rewarded or punished incumbents based on legislative performance (Bianco et al. 1996; Carson and Engstrom 2005), although this may have been restricted to hypersalient votes.

There is also growing evidence that the attributes of the candidate who was chosen to be a party’s nominee for Congress could be quite consequential in nineteenth-century elections. Carson and Roberts (2013) find evidence of candidate-specific effects in the two decades prior to the adoption of the Australian ballot, which raises a host of important implications for our understanding of elections during the party ballot era. There is even evidence of candidate effects during

the first two decades of the nineteenth century when the parties were still in their infancy (Carson and Hood 2014). Similarly, Garand and Gross (1984) and Gross and Garand (1984) find that incumbents consistently outperformed nonincumbent candidates as far back as the 1820s.

How do we reconcile these findings with work by Engstrom and Kernell (2005, 2014), which suggests that the use of the party ticket made the attributes of individual congressional candidates largely irrelevant? We believe the answer to this question lies in the unique individual-level variation in the structure of nineteenth-century elections. Whereas Engstrom and Kernell (2005, 2014) focus on state-level election returns during presidential election years, we focus on district-level outcomes during all elections from 1840 to 1888. In doing so, we are able to offer unique insights on the relationship between candidate-specific attributes and electoral competition during this era.

We want to be clear that our argument does not necessarily conflict with Engstrom and Kernell’s (2005, 2014) broader account of electoral politics under the party ballot. There can be little doubt that the party ballot actively discouraged individual voters from choosing between individual candidates in all races. Similarly, the party ballot clearly amplified coattail effects for down ticket races since these candidates’ fortunes were tied more directly to the fate of the party’s standard bearer (Engstrom and Kernell 2005). While these factors might minimize the importance of congressional candidates relative to modern elections, it does not necessarily follow that the attributes of individual candidates were always irrelevant. Our argument can therefore be seen as building on Engstrom and Kernell’s (2005, 2014) analysis, in that we seek to identify the conditions under which candidate-specific factors were most likely to influence congressional election outcomes.³ In the sections that follow, we discuss how concern for the overall quality of a party’s ballot and variation in the nationalization of elections could influence the impact of congressional candidates on election outcomes in this era.

Quality of the party ballot

Both congressional candidates and political parties during this era were concerned about the overall quality of their party’s slate of candidates. Indeed, the creation of congressional campaign committees in the 1860s was motivated in part by concerns about the deleterious effects of weak presidential candidates on legislative races (Kolodny 1998).

2. See Rogowski and Gibson (2015) for evidence of electoral accountability prior to the adoption of the secret ballot.

3. Furthermore, the structure of the party ballot itself should make it difficult to find any evidence of candidate-specific effects, which implies that this period in history represents a particularly difficult test case.

These fears were well founded since the party ballot linked the electoral fate of all party members who appeared on the same ballot. For this reason, parties had an incentive to think about the overall “quality” of the ballot they assembled. Carson and Roberts (2013) contend that the collective nature of the party ballot meant that parties who wished to maximize their chance of winning “needed to be concerned about how the candidate for each office on the ballot would affect the collective reputation of the party” (31). Under this arrangement, candidate recruitment efforts could result in spillover effects for down ballot races, and potentially even higher offices, if one party enjoyed a quality advantage over the other.⁴

There are two candidate-specific attributes that could enhance the overall quality of a party’s ballot. First, incumbent members of Congress who seek another term in office should improve the overall quality of a party’s slate. During the period we examine, over three-quarters of the incumbents who ran for reelection were returned to Congress. Although there was some variability in incumbent fortunes, the lowest reelection rate was approximately 59% in 1874, and there were 12 elections where at least 80% of incumbents were reelected. Furthermore, incumbents routinely outperformed their counterparts in open seat races. Garand and Gross’s (1984) analysis of congressional elections from 1824 to 1980 led them to conclude that “incumbent winners have always done better than nonincumbent winners” (29), which is consistent with our results. Parties therefore had good reason to believe that including a congressional incumbent on their party ticket could yield real, positive electoral returns for the party’s entire slate of candidates. Indeed, we would expect a party’s past electoral performance to be a better predictor of the current election outcome when they ran an incumbent.

Second, we expect the prior experience of candidates in both open seat and incumbent-contested races to influence overall ballot quality. In modern elections, both incumbency and candidate quality typically lead to positive electoral returns in part because the process of winning prior office means a candidate will know how to run and win a campaign. Experienced candidates also generally have higher levels of name recognition compared with those political amateurs seeking elective office. Although both of these explanations are likely less relevant in predicting electoral success during an era where party ballots were in use, the party organizations still preferred having a high-quality candidate on the ballot. In a period where voter mobilization was especially crucial

for a party’s electoral fortunes across all offices (Engstrom 2012), the presence, and arguably the absence, of experienced candidates could have important implications for a party’s voter mobilization efforts. Although party agents were the central actors in the on-the-ground mobilization (Bensel 2004; Ware 2002), the inclusion of candidates with a previous record of service would facilitate this job as it could give the voters something to further interest and motivate them in participating in the election beyond simply the party label. These attributes were no less important in a presidential election year since presidential candidates traditionally did not campaign themselves, and local party organizations were responsible for managing voter mobilization efforts on behalf of the national campaigns (Aldrich 2011; Kernell 1986).

Our theoretical expectations about experienced candidates enhancing the overall quality of the party ballot are strongly supported by both anecdotal and empirical evidence from this era. Various newspaper accounts during this period discuss and emphasize the importance of local parties recruiting the “strongest” possible candidates, often those with prior elective experience, to run for office given the deleterious effects that weak candidates could have on the ballot as a whole.⁵ In an era where existing norms did not permit presidential candidates to campaign for office, parties relied extensively on congressional candidates to motivate voters to go to the polls to support their slate of candidates. Additionally, voter turnout was quite variable throughout the nineteenth century (Burnham 1965; Engstrom 2012), and recent evidence suggests that it was significantly higher in House districts where the parties successfully recruited quality candidates to run for office (Carson and Sievert 2016). The fact that the parties typically recruited experienced candidates to run in what were perceived to be the most winnable races (as reflected by presidential vote in the district) indicates to us that they valued the presence of high-quality candidates on the ballot.

4. See Carson and Roberts (2013, 30–35) for a more detailed discussion of this point.

5. Nineteenth-century newspaper accounts offer frequent commentary about how congressional candidates would influence party’s chances in the upcoming election. For example, the *New York Times* described the 1868 congressional nominations in Indiana’s Seventh, Eighth, and Eleventh district as “foolish nominations” that “will cost the Democracy thousands of votes” (*New York Times*, July 7, 1868). Indeed, two of the “weak” candidates were amateurs with no previous elective experience running against high-quality candidates. Furthermore, nineteenth-century congressional party slates were often mentioned in terms of overall quality. When discussing the Republican congressional nominees in Michigan, the *Detroit Advertiser* opined that the “complete [Republican ticket] is an able and a strong one, and we confidently trust will be elected entire, although not without active work in the First, Fifth, and Sixth Districts” (*New York Times*, August 3, 1868).

Nationalization of elections

Jacobson (2015) argues that the rise of candidate-centered elections in the mid-twentieth century was a consequence of the “denationalization” of congressional elections. Jacobson points to “diminishing levels of party loyalty in the electorate” and the “decoupling of congressional and presidential elections” as the driving forces of these developments (861). Over the last several decades, however, House elections have shifted back to being nationalized affairs where congressional candidates are largely subject to national partisan tides (Jacobson 2015, 863–65). While Jacobson’s argument is convincing, an analysis of historical elections provides a unique opportunity to test these claims more systematically. Parties dominated elections during much of the nineteenth century, and voters could not easily split their ticket, which means elections were often highly nationalized in this era as well.

We believe that an examination of two factors—midterm elections and election timing—can be particularly fruitful for understanding the effect of nationalized elections. An interest in the effect of ballot design on split ticket voting led many previous studies to focus their analysis on presidential elections (Engstrom and Kernell 2005; Rusk 1970). During midterm elections, however, presidential coattails were absent, which should result in less nationalized congressional elections.⁶ Our primary expectation about midterm elections is that the attributes of individual congressional candidates should have a larger effect in midterm elections rather than presidential election years.

Today, presidential and House elections are held concurrently, but this was not always the case during the nineteenth century. Throughout much of this period, congressional elections were held outside of November, with some occurring months prior to, or even months after, the presidential election (Engstrom 2012). Although the practice of off-November congressional elections was supposed to end in 1872, a few states continued to hold congressional elections at irregular times for the next decade (2012, 375–76). In states where congressional elections were held outside of November, a voter’s choice of ballots in the congressional race did not require him to first choose among the presidential candidates. As a result, the relationship between presidential and congressional vote margins was weaker in these off-November elections despite the use of a party ballot (Engstrom and Kernell 2005, 2014).

6. While a type of coattail effect might occur in midterm years when congressional and gubernatorial elections coincided, these cases should not result in a nationalizing effect.

Differential election timing provides a particularly ideal test of Jacobson’s arguments about the nationalization of congressional elections. To date, the argument has been tested based on a comparison of data over time because there is no cross-sectional variation in modern congressional elections. By turning to historical elections where election timing was not uniform, our analysis can exploit the variation in nationalization within the same election year. Congressional elections held in November should be highly nationalized during a presidential election year but should be far less so during a midterm. We therefore expect the effect of candidate attributes on electoral competition to be larger in midterm elections than in presidential election years for elections held in November. In contrast, nationalization should not only be lower for congressional elections held after November, but it should also be constant across election years for post-November elections. We therefore do not expect there will be significant substantive differences across presidential and midterm years for these elections.⁷

DATA AND METHODS

As with any project of this nature, one of the biggest challenges we faced was the need to track down a considerable amount of historical elections data. Our search was largely facilitated by Dubin’s (1998) *United States Congressional Elections, 1788–1997*, the most comprehensive source for electoral data over time. Using this invaluable source of candidate information, we were able to collect relevant information on the names of the incumbent and related challengers, the vote totals on which percentages of the two-party vote were computed, the dates on which elections occurred, as well as the partisan affiliation for each candidate. Moreover, the latter was supplemented with information from Martis’s (1989) *The Historical Atlas of Political Parties in the United States, 1789–1989* to fill in gaps in party identification.⁸

Since a systematic understanding of the role of candidates during this era would necessitate a thorough examination of candidate experience or quality, it was also necessary to collect data on candidates’ political backgrounds. Not surprisingly, the coding and collection of such data proved far less straightforward than other variables in our

7. Although elections held before November may be nationalized because the national campaigns and parties see them as a proxy or test run for the upcoming presidential election, it is not clear that the effect would be felt uniformly across all districts. We therefore confine our formal expectations to November and post-November elections.

8. Party affiliation was very fluid doing much of the era under consideration. In the few instances when the party label did not match up between these sources, we relied on Martis (1989).

analysis. Throughout our analysis, we follow Jacobson's (1989) approach and measure candidate quality as whether or not a candidate currently holds or has previously held elective office. Although other more nuanced measures exist, we chose not to employ them for two specific reasons. First, almost all prior studies have demonstrated that the dichotomy performs as well as more sophisticated measures in other studies of challenger quality (Jacobson and Carson 2016); thus the dichotomous measure gives us a more parsimonious model without suffering any substantive loss. Second, it would be extremely difficult to construct a scale measure that would compare the "quality" of previous offices held throughout the nineteenth century. That is, although the simple dichotomy is a blunt measure and may indeed be an imprecise measure of candidate quality, we think constructing a more nuanced measure for this time period may increase measurement error for some offices, while providing little additional precision in other cases.

To track down as much data on candidates' backgrounds as possible, we had to search a number of archives and online sources. Our first strategy was to systematically search through the online *Biographical Directory of the U.S. Congress, 1774 to Present*.⁹ The *Directory* is a comprehensive source providing a detailed career history for every legislator who has served in Congress. Given the enormous amount of legislative turnover during this era, this resource allowed us to obtain background information on candidates who defeated congressional incumbents as well as candidates who served prior to, or after, the specific election in question. We supplemented these data with information found on "The Political Graveyard's" Web site,¹⁰ which often provides extensive background information on politicians from the nineteenth and twentieth centuries (in addition to where they are buried). Additional background information was collected from the *New York Times* Historical Index and *Google*.¹¹

Unlike the modern era, congressional districts varied dramatically in both population size and geographic boundaries. In some cases, this was the result of states using either multimember districts or at-large districts. A handful of states elected candidates in multimember districts during the early antebellum period, which poses a potential measurement issue for how we deal with partisan vote share in

single-member versus multimember districts. We address this by matching the winning candidates with the losing candidates who ultimately came closest to winning. The advantage of this approach is that it allows for a direct comparison between vote shares in both single and multimember districts.¹²

As noted earlier, party identification was more fluid during this time period, but the Democrats were the one consistent party throughout this era. We therefore code the two-party vote with reference to the top Democratic finisher and the top opposition party finisher.¹³ In the 1840s and 1850s, the opposition candidate is typically a Whig, whereas from the 1860s onward Democrats typically faced a Republican.¹⁴ Our measure of district-level presidential vote is constructed in the same manner. Unlike in recent elections, however, presidential vote returns are only available at the county level during this period. We therefore aggregate the votes across counties within a district to obtain the total vote for each presidential candidate and calculate the two-party vote with these vote totals.¹⁵

RESULTS

Although the electoral success of twentieth-century incumbents and the importance of who emerges to challenge these incumbents is well documented (Jacobson 1989; Jacobson and Carson 2016), prior research on nineteenth-century congressional elections often focuses on the post-Civil War period (Carson et al. 2007; Carson and Roberts 2013). Since elections under the party ballot were party-centered affairs, past research suggests that a general partisan advantage and not attributes of individual candidates

12. An alternative approach would be to employ Niemi, Jackman, and Winsky's (1991) method to calculate vote share in multimember districts by generating sets of pseudo-pairs for winning and losing candidates. Unfortunately, this approach can lead to artificial inflation in candidate vote share among nonsymmetric races where candidates appear to receive 100% of the vote.

13. The emergence of third parties is a common issue when studying congressional elections in this era. Overall, only 3.9% of elections held during this period featured a third party candidate who won or was the opposition candidate. In these cases, we attempted to determine whether the third party candidate either caucused with one of the major parties or later affiliated with a major party in a later Congress or election. Our results are not contingent upon including these cases.

14. One exception, however, is the Southern states during the 1850s, which typically featured a Democrat and an American Party candidate. Although the American Party is usually treated as a third party, in the South it is effectively one of the two major parties in congressional elections. We therefore treat the American Party as a major party in these races.

15. We were not able to collect this measure in cases where district lines cross county borders or there are multiple districts within a county. The first is actually quite rare in this period, and the latter typically occurs in urban areas.

9. This biographical directory is online at <http://bioguide.congress.gov/biosearch/biosearch.asp>.

10. The Political Graveyard Web site can be accessed at <http://www.politicalgraveyard.com>.

11. Using these sources, we tracked down slightly more than 75% of the data on candidate backgrounds. Following Jacobson (1989), we code candidates for whom we could not find any background information as nonquality. Our results are robust to alternative specifications.

should structure election outcomes. In contrast, we expect that individual candidates had a more important role in these elections than has previously been acknowledged. Our contention is that congressional candidates could contribute to the overall quality of a party's electoral slate. Furthermore, these candidate-specific effects should be greatest when elections are less nationalized. In the remainder of this section, we examine each of these points in turn.

Ballot quality

In order to ascertain whether candidate-specific attributes influenced a party's electoral fortunes, we begin by estimating a series of regression models to explore how individual candidates shaped election outcomes. There are two pieces of evidence that can be particularly informative assessing our theoretical expectations. First, if the coefficient estimates for candidate quality are positively related to congressional vote share, even after controlling for district-level variables, then we can infer that a candidate recruitment advantage yielded higher vote shares for a party. Second, the estimates for lagged congressional vote provide evidence of the extent to which a party's fortunes in the last election influenced the outcome in subsequent elections. If incumbent candidates provided additional benefits for a party, whether it be name recognition or the ability to mobilize and attract voters, then we should expect their past performance to have some statistically significant predictive power. Conversely, when these benefits are removed in situations such as open seat races, a party's previous electoral strength will be a less powerful predictor of its performance in the current election.

The outcome variable in our regression models is the Democratic share of the two-party vote.¹⁶ We model Democratic vote share as a function of the district-level lagged Democratic vote share, the Democratic quality advantage (DQA), the district-level Democratic presidential two-party vote, an indicator variable for the South, and election year fixed effects (which are not reported in the table), to control for any year or election-specific factors such as national tides.¹⁷ We follow Cox and Katz (1996) and code DQA as

1 (−1) when the Democratic (non-Democratic) candidate is the only candidate with prior electoral experience and 0 when both (or neither) candidates have prior electoral experience.¹⁸ A positive and statistically significant coefficient estimates for DQA would provide support for our theoretical expectation that candidate-specific factors improve the overall quality of a party's ballot.

The first column of table 1 reports the coefficient estimates for the full series (1840–88). The coefficient estimate for DQA supports our expectation that the recruitment of high-quality candidates produced positive electoral returns for the political parties of this era.¹⁹ Even after controlling for other district-level factors, when one party had a recruitment advantage over the other, it received a 3-percentage point gain on Election Day. In the final two columns of table 1, we report the regression estimates for incumbent and open seat races, respectively. For the five decades we examine, an incumbent is predicted to receive just over a 3-point increase in his vote share when facing an inexperienced challenger. We find a comparable effect in open seat races, which indicates that the parties were selective about who they recruited to run for House races. We want to reemphasize that the conventional view is that candidate attributes should have no independent effect on election outcomes. The fact that we find evidence of candidate quality effects after controlling for district-level factors stands in sharp contrast to a number of previous accounts of historical congressional elections.

The coefficient estimates for lagged Democratic vote in the incumbent-contested and open seat races also comports with our expectations. In open seat races, the lagged congressional vote is not a significant predictor of the Democratic vote share in the current election. Instead, district par-

models does, however, account for variation in nationalization across years. Since nationalization is conceptualized in terms of partisan waves, these year-specific parameters model this dynamic and partial out variation due to differences across years.

18. Our coding rules regarding party affiliation for the construct of this variable are the same as those used for the two-party vote.

19. One potential concern is that the candidate quality measure might be endogenous. As others have noted, however, there are reasons to expect this to be a minor problem (Gerber 1998). The primary empirical challenge is that we lack a set of viable instrumental variables (IVs). As is well known, the use of "weak" instruments can in fact be worse than simply including the endogenous covariate (Hahn and Hausman 2003). Since the primary concern is that the estimated effect is a function of "better" quality candidates selecting more favorable races, we employed a number of alternative model specifications in order to gauge the robustness of our findings, which are available in our appendix. Regardless of whether we limit our analysis to marginal races or directly model a potential selection process, we still find evidence of an effect for candidate quality. Furthermore, the estimates from these alternative specifications are generally comparable in magnitude to the "naïve" OLS estimates.

16. We exclude all races in which two incumbent members of Congress face each other due to redistricting. We also follow the convention of excluding all incumbents who did not face a major party challenger (Jacobson 1993).

17. Although we focus primarily on variation in nationalization within a given election year, nationalization can also vary across election years. For example, the 1862 midterm elections were markedly more nationalized than other midterm elections during this era. We conceptualize nationalization in terms of differential election timing because it fits most closely with recent work by Engstrom (2012) and Engstrom and Kernell (2005, 2014). The inclusion of yearly fixed effects in our empirical

Table 1. Democratic Congressional Vote, 1840–88

	All (SE)	Inc. (SE)	Open (SE)
Dem Vote _{t-1}	.15* (.02)	.20* (.03)	.05 (.03)
DQA	3.22* (.21)	3.34* (.27)	2.82* (.29)
Dem. Pres.	.55* (.03)	.52* (.04)	.62* (.04)
South	3.51* (.42)	3.58* (.52)	3.14* (.64)
Constant	14.39* (1.17)	13.52* (1.56)	16.22* (1.59)
N	4,409	2,765	1,644
R ²	.61	.64	.56

Note. Cell entries are OLS regression coefficients with standard errors clustered by congressional district reported in parentheses. Election-year fixed effects are included but not reported here. DQA = Democratic quality advantage.

* $p < .05$.

tianship, as captured by presidential vote, appears to be the key driving force. Indeed, the point estimate for the presidential vote is over 10 times larger in magnitude than the coefficient for lagged congressional vote. In contrast, when an incumbent sought another term in office, his previous electoral performance provides additional explanatory power beyond district partisanship alone. While the point estimate is still larger for presidential vote, the difference is considerably smaller than in the open seat races. Furthermore, the point estimate for lagged congressional vote is four times larger in the incumbent model than it is for open seat races. In short, these results provide support for our argument that a party's overall electoral strength was more consistent from year to year when they were able to run an incumbent.

While table 1 indicates that congressional candidates could enhance the overall appeal of a party's ballot, we also wish to examine whether congressional candidates could produce spillover effects for other races as Carson and Roberts (2013) suggest. In particular, we follow Broockman's (2009) regression discontinuity design (RDD) based approach to test whether congressional candidates had "reverse" coattails in presidential elections.²⁰ By doing so, we can examine whether

20. RDD exploits the "as if" random assignment of winners and losers in close elections to obtain an estimate of the consequences of winning an election at time $t-1$ on outcomes at time t (Eggers et al. 2015; Lee 2008). The key theoretical and empirical assumption is that candidates on either side of the electoral threshold (i.e., 50%) will not be systematically different, save for their treatment status (Caughey and Sekhon 2011; Lee 2008). In the appendix, we report a detailed assessment of the applicability of this assumption for our data.

sharing a partisan affiliation with the incumbent party boosts a presidential candidate's vote share. The existence of reverse coattails would run counter to the expectations of some prior studies, which contend that presidential candidates, by virtue of being at the top of the ticket, dominated vote choice under the party ballot. While there is no reason to doubt this argument, we also know that local party organizations played a more central role in organizing the presidential campaigns' voter mobilization efforts (Aldrich 2011; Kernell 1986). As such, it is possible that presidential candidates would benefit from having high-quality local candidates who could help turn out loyal partisans and attract other potential supporters.²¹

For our analysis, we take advantage of the variability in election timing during this era. If congressional candidates did produce spillover effects, we should expect to find these effects only for those elections held in November. The outcome of the last congressional election should not influence presidential vote share for elections held before or after November since these candidates were not on the same ballot as their party's presidential candidate. We therefore estimate separate models for elections held before November, in November, and after the November of a presidential election year.

In figure 1, we report the RDD estimates for our analysis of reverse coattail effects.²² The results for elections held in November comport with our theoretical expectations as a presidential candidate's vote share is estimated to increase by 3.4 points when his party won the last congressional election. It is important to emphasize that this analysis only examines "close" elections, which in this case means those won by 5 points or less in the last election. As such, a roughly 3 percentage point boost in vote share is substantively quite large and could help tilt a race in one party's favor in such close races. More importantly, there is no evidence of reverse coattails in either the pre-November or post-November models as we expected.

21. After the 1860 presidential election, a *New York Times* correspondent reported that local Democratic Party officials in California pointed to candidate recruitment as a key factor in Abraham Lincoln's narrow victory in the state over Stephen Douglas. The California Democrats contended that if they had "placed in nomination for municipal and legislative offices, as good, as trusty citizens as the Republicans chose, they would have carried the State" for Douglas (*New York Times*, December 26, 1860).

22. The reported estimates are from a quadratic specification where the cutoff is a margin of victory of less than 5 percentage points. Our substantive interpretation remains the same if we use a local linear or higher order polynomial specification. Similarly, the results are the same when we employ bandwidths of 1 and 2.5 instead of a bandwidth of 5.

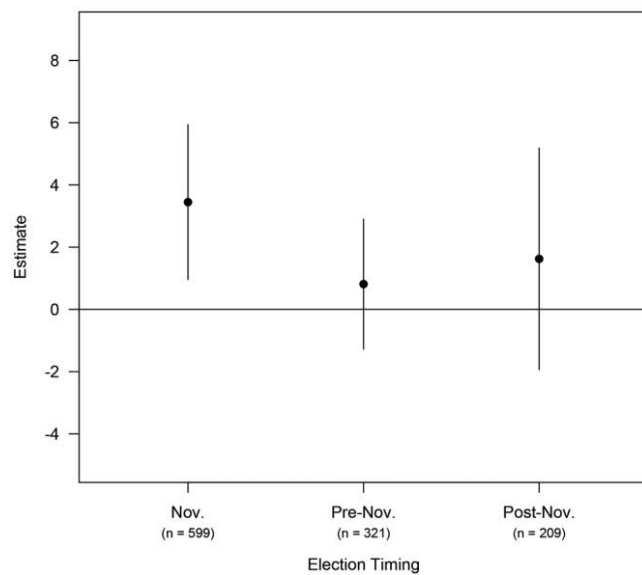


Figure 1. Effect of close elections on future presidential vote share

Taken together, the analyses reported in table 1 and figure 1 demonstrate that contrary to the expectations of previous scholarship, congressional candidates played an important role in structuring election outcomes during this era. Indeed, the attributes of individual congressional candidates could produce positive electoral returns for a party, which would have important consequences for a party's entire slate of candidates. Similarly, previous congressional election outcomes, even in potentially competitive districts, could shape a party's fortunes in subsequent elections. We now shift our focus to the role of nationalization of elections to investigate how this affected candidate-specific effects in nineteenth-century races.

Nationalized elections

As discussed earlier, greater nationalization of elections should weaken the effect of candidate-specific attributes at the polls (see Jacobson 2015). The party ballot era is a particularly fertile period in which to test this proposition because split-ticket voting, which Jacobson identifies as a key theoretical mechanism that led to denationalized elections in the mid-twentieth century, rarely occurred when the party ballot was in use (Rusk 1970). Our primary theoretical expectation then is that the electoral returns to candidate quality should be significantly lower during presidential election years when electoral politics would be more nationalized than in a midterm year. For an initial test of the effect of nationalization, we begin by comparing the effect of candidate-specific qualities in midterm and presidential election years.²³ In order to con-

duct this analysis, we estimated a series of regression models where the lagged congressional vote, candidate quality, and presidential vote were all interacted with a dummy variable for whether or not the election took place in a presidential election year.²⁴ We then calculated the marginal effects for candidate quality, which are the first set of marginal effects reported in figure 2, to ascertain the effect of each variable in midterm and presidential years.²⁵

As expected, the effect of candidate quality is larger in midterm election years and the confidence intervals for the marginal effects do not overlap. The differences are also substantively meaningful as the point estimate for midterm elections, roughly 4.67, is over two times larger than the estimate for presidential election years (approximately 2.26). While the effect of candidate quality is smaller in presidential years across our different specifications, it is important to mention that we do find evidence of a statistically significant quality effect in presidential years where most of the prior literature suggests such effects should not exist. The finding is noteworthy because it suggests that even though nationalization weakens the effect of candidate-specific factors, individual candidates can still influence election outcomes during periods of highly nationalized elections where party line voting is pervasive.

The staggered nature of elections during this era also provides unique leverage on the impact of nationalization. Specifically, we should only find greater differences between the effect of candidate quality across midterm and presidential years in November elections than in off-cycle elections. Indeed, by virtue of being synched with presidential contests, elections held in November should be the most nationalized, which means the removal of presidential coattails should have their greatest effect in these specific races. In order to examine our expectation, we estimate the model outlined above separately for November, pre-November, and post-November elections. We then calculated the marginal effects for candidate quality for each model and display the resulting estimates in figure 2. As expected, the differences between election years are far more pronounced for elections held in November. In the case of candidate quality, the estimated effect is approximately 2.7 percentage points higher for on-cycle elections but around 1.5 percentage

2012), the assumption that nationalization was, on average, greater during presidential election years is theoretically justified. That is not to say that some midterm elections, such as 1862, were not also nationalized.

24. In an effort to facilitate the interpretation of the resulting interactions, we centered our measure of lagged congressional vote and presidential vote at 50.

25. The model estimates used to calculate the marginal effects presented in figure 2 are reported in the appendix.

23. Given presidential candidates were at the top of the party ballot and voter turnout in this era was higher in presidential years (Engstrom

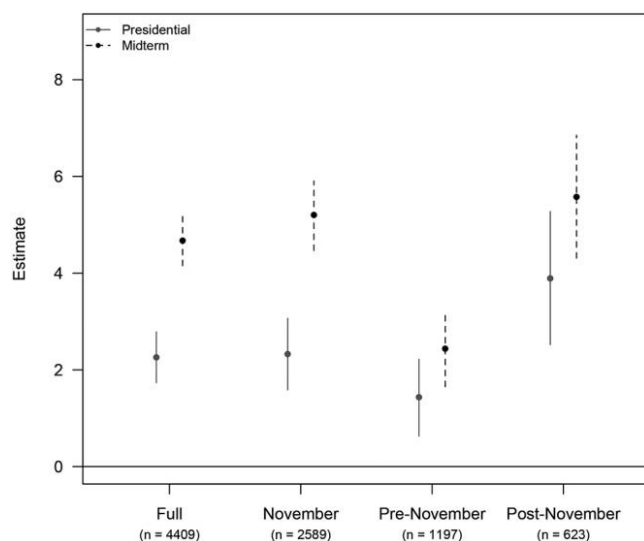


Figure 2. Marginal effects of DQA in presidential and midterm elections

points for off-cycle elections. Furthermore, the marginal effects for November elections are the only ones whose confidence intervals do not overlap.

In sum, these findings clearly suggest that candidate-specific effects were significantly larger in congressional races where elections were less nationalized. Our results therefore not only offer support for Jacobson's (2015) argument but also suggest that his theoretical argument is applicable to congressional elections across a large swath of American history. It is important to note, however, that there is an important difference between the time period we examine and modern elections. During the nineteenth century, nationalized elections were the result of the institutions that governed elections (e.g., the party ballot) rather than voters choosing to cast a vote for presidential and congressional candidates of the same party. As such, the structure of the ballot itself makes this time period a particularly difficult test case in which to find evidence of candidate-specific effects. The fact that we still find evidence of candidate quality influencing electoral outcomes when elections were more nationalized speaks to the importance of individual congressional candidates in this political era.

CONCLUSION

Prior accounts of the party ballot era suggest that characteristics of individual candidates should be of little consequence because voters' only option was to choose between parties at the polls. While there is little reason to doubt the accounts about the basic mechanics of the party ballot, we believe congressional candidates had a far more important role to play than previously acknowledged in the extant literature. Even though voters were forced to choose between parties rather than candidates, our findings suggest that

candidate-specific attributes influenced election outcomes in nineteenth century House elections. Indeed, our results provide new evidence to suggest that at least some voters responded to more than just party cues when they decided how to vote on Election Day.

Overall, we find support for our general expectation that the quality of a party's ballot and variation in the nationalization of elections conditioned the impact of congressional candidates on election outcomes. First, even though voters were not able to directly cast a vote for individual candidates, the party performed significantly better in congressional election when it recruited experienced candidates to run under their party label. Our findings also raise important questions about the conventional view of the relationship between presidential and congressional elections during this specific era. While winning a close election could benefit a party in subsequent elections, it could also help the party's presidential candidate when he appeared on the same ballot as the party's nominee for Congress. Unlike in the modern era, it appears that presidential candidates were, at times, able to benefit from reverse coattails.

Second, our results strongly suggest that midterm elections and nonuniform election timing influenced the extent to which congressional elections were nationalized. The effect of candidate quality was roughly two times larger in midterm elections than in presidential election years. These differences are notable in part because candidates for the House were often included at the very top of the party ballot during midterm elections.²⁶ Similarly, we found sizable differences between the effects of candidate quality across presidential and midterm elections for congressional elections held in November. We do not, however, find the same pattern of differences across presidential and midterm years for elections held after November, which fits with our expectation that nationalization was not only lower for this set of elections, but it was also more constant across time.

The latter set of results is particularly noteworthy since it points to one of the key benefits of studying historical congressional elections. By looking to an era where electoral rules were less uniform, we were able to provide a unique test of Jacobson's (2015) argument about the relationship between the nationalization of congressional elections and candidate-centered politics. Specifically, we were able to leverage the variation in nationalization within the same election year that was a direct result of nonuniform election dates. Although it is not always possible to use historical data for these purposes, we believe that the analysis of historical elec-

26. On the issue of ballot placement during this era, see Engstrom and Kernell (2014).

tions is one area that is particularly promising.²⁷ In the future, we hope more scholars of congressional politics will look for historical settings that provide unique variation in the institution or institutional rules they seek to study.

Although our analysis focuses explicitly on congressional elections, we believe it would be useful for future research to analyze down ticket (state legislative and local) races as well.²⁸ Indeed, since the fate of all members of the party was tied together by the structure of the ballot, we believe it would be useful to examine questions related to the interaction between a broader set of elections. While Engstrom and Kernell (2014) focus on the extent to which presidential elections nationalized state and local elections, it also would be beneficial to examine whether congressional candidates could produce similar coattails effects. Both midterm elections and nonuniform election timing meant that there were numerous elections for which congressional candidates, and not presidential or gubernatorial candidates, were at the top of the party ticket.

These down ticket races could also be analyzed to examine the importance of the overall party ticket. Given that state legislative and local elections returns are difficult to obtain for this era, we focus more pragmatically on congressional elections where the data are systematically and readily available. Our understanding of the importance of the overall quality of the party ticket would benefit, however, from analyzing the subset of states where these data are available. In these cases, it could be informative, for instance, to examine whether a party benefited from a ticket with incumbents in multiple offices. Similarly, by looking at local level races, we may get a better sense of how party agents mobilized voters during this era.

It is important to note that our analysis is only a first step toward developing a better understanding of congressional elections across time. Although it is important to first establish that individual congressional candidate did in fact impact election outcomes under the party ballot, we believe that there are a number of related and important questions about this era still to be addressed. For instance, to what extent is there meaningful evidence of an incumbency advantage during this era? Furthermore, if an incumbency advantage did exist, was it due to a potential scare off effect or

candidate recruitment practices? In light of the substantial turnover in the House during this period, how often was the decision to leave the chamber truly voluntary, as previous work has suggested? Additionally, would we continue to find similar candidate-specific effects if we were to investigate even further back into the antebellum era? Examining these types of important questions in future work should help us better understand the electoral and institutional origins of Congress over the course of American history.

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27. See Engstrom (2012), Finocchiaro and Jenkins (2016), and MacKenzie (2015) for other recent examples of using historical data to test theories about modern politics.

28. A significant challenge to this research is that state legislative and local elections data are quite difficult to come by during this era. Indeed, Engstrom and Kernell (2014) note the "shocking absence of state election returns" (150) throughout this era.

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