Between Movements and Parties:
The Place of Insurgents in American Party Politics

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Abstract

In both the past and the present, party insurgents loom large on the American political landscape. But political scientists have yet to develop any theoretical framework capable of systematically understanding their role in processes of party transformation and political change. In this theory-building paper, I address this gap by answering three fundamental research questions: What defines insurgency? What plausible mechanisms connect insurgents to party change? And, more normatively, are insurgencies good or bad for US democracy? Building on but going beyond the extant literature, I theorize insurgency as a form of contentious politics that mobilizes a party-transforming coalition through the electoral process. While most insurgents fail to win nomination or election, I argue that they can still change parties by laying the organizational and ideational infrastructure that enables subsequent politicians to follow in their wake, potentially reordering the party over time. However, while insurgents lay the groundwork for injecting new ideas, policies, and coalitions into mainstream politics, they do so by destabilizing parties, shattering established norms, and undermining public trust in representative institutions. Paradoxically, then, insurgents have the potential to both revitalize democracy and facilitate democratic backsliding.

Prepared for the Annual Conference of the American Political Science Association
Montreal, Quebec, Canada
September 14-18

From the Tea Party to Donald Trump, Bernie Sanders to Alexandria Ocasio-Cortez and the rest of "the Squad" in Congress, American politics is being reshaped by party insurgents. Yet, despite their apparent importance, political scientists have yet to develop any theoretical framework capable of systematically understanding the role that these catalytic agents play in processes of party transformation and political change. In this theory-building paper, I address this gap in the political science literature by developing a research agenda for investigating the influence of insurgent presidential challengers on American politics. In doing so, I provide answers to three fundamental research questions: What defines insurgency? What plausible mechanisms connect insurgents to party change? And, more normatively, are insurgencies good or bad for US democracy?

Building on but going beyond the extant literature, which has focused most of its attention on third-party insurgents outside the two-party system, I theorize insurgents as entrepreneurial agents operating at the intersection of movements, parties, and electoral politics. I argue that, though typically identified with a prominent candidate or nominee, insurgencies are constituted by more than just lone mavericks—they are fundamentally collective forms of contentious politics (McAdam, Tarrow, Tilly 2001; Tarrow 2022; Tilly and Tarrow 2015). Further, insurgencies are motivated by more than "policy demands"; whether they achieve it or not, insurgent movements aim at fundamentally remaking one of the major parties in their image.

Most insurgencies, of course, fall far short of this ambitious goal. Indeed, most insurgents fail to win either nomination or the general election (Boatright 2013). Still, I argue that insurgents can change parties, even when they lose. In the course of an insurgency, political entrepreneurs, policy-demanding groups, and movement activists are drawn together into coalitions that develop new organizations, networks, identities, ideas, and agendas capable of persisting beyond campaign season. While the initial challenge may extract concessions from the party establishment in the short

term, the insurgent infrastructure built along the way can enable subsequent office seekers to follow in their wake, potentially reordering the party over time.

Finally, while insurgents lay the groundwork for injecting new ideas, policies, and coalitions into mainstream politics, they do so by destabilizing parties, shattering established norms, and undermining public trust in representative institutions. Paradoxically, insurgents have the potential to both revitalize democracy and also facilitate democratic backsliding. Thus, I conclude this paper with some thoughts on insurgents' ambivalent impact on the quality of representation and democratic governance.

Our Ignorance about Insurgents

The systematic study of party insurgents has often been overshadowed by other concerns. As Tichenor and Fuerstman (2008) have noted, the bulk of the research on insurgent campaigns has been devoted to studying the causes and consequences of third-party or independent presidential candidacies that occur outside the two major parties (e.g., Milkis 2009; Rapoport and Stone 2005; Rosenstone, Behr, and Lazarus 1996). Research that has looked at intraparty insurgents has tended to examine them as isolated cases. Recently, scholars have highlighted the insurgent presidential candidacies of Barry Goldwater (Perlstein 2001), George McGovern (Miroff 2007), Donald Trump (Alberta 2019; Sides, Tesler, and Vavreck 2018), and Bernie Sanders (Gautney 2018; Masket 2020). At the same time, other scholars have focused on congressional insurgencies, including the 1994 Gingrich revolution (Zelizer 2020) as well as the Tea Party movement (Blum 2020; Gervais and Morris 2018; Skocpol and Williamson 2012). All of these studies argue for the substantive importance and lasting influence of their subject. Yet no general theory of party insurgency has emerged that could help cumulate these disparate findings or enhance our understanding of the interactive effects connecting insurgent presidential and congressional campaigns. As a result, our

understanding of the overall impact of party insurgents on American political development remains shallow and unsystematic.

However, new pioneering scholarship across several distinct research streams has provided a foundation on which such a theory of insurgent influence could be constructed. New perspectives on political parties have paid increasing attention to the role of non-party forces in shaping presidential nominations (Bawn et al. 2012; Cohen et al. 2008), congressional nominations (Hassell 2018), policy positions (Heaney and Rojas 2015; Karol 2009), and ideological coalitions (Noel 2013). Other studies have shown that both Democrats and Republicans have realigned their social and political bases several times over in response to the pressure exerted on them by social movements and networks of interest groups (Baylor 2018; Cohen 2019; Rosenfeld 2018; Schickler 2016; Tarrow 2021), institutionalizing some of them as "anchoring alliances" thereafter (Schlozman 2015). This increased analytic attention to the complex networks that connect interest groups and social movements to parties calls out for a focused analysis of the role of insurgent campaigns as key variables linking grassroots organizing with electoral politics and party change.

Another stream of research useful for analyzing the influence of insurgents has focused on the hitherto underappreciated role that loss or failure can play in reshaping the course of American political development (Tulis and Mellow 2018). In this perspective, prominent political figures or coalitions well-known for going down in flames in their own time bequeath to subsequent generations ideational frameworks and nascent coalitions that come to have an influence far exceeding what they enjoyed at the time of their defeat. More than simply an ironic twist of fate, Tulis and Mellow (2018, 11) argue that failures themselves can become "modes of agency that …[ultimately] bring about success." Two prominent instances of this phenomenon include the two greatest insurgent failures of the twentieth century: Barry Goldwater and George McGovern (see Busch 2014). At the time of their presidential campaigns (1964 and 1972, respectively), both

nominees suffered landslide losses to popular incumbents—Goldwater carried only the Deep South and his home state of Arizona; McGovern only Massachusetts and the District of Columbia. Yet, in hindsight, what appeared at the time to be devastating and discrediting losses clearly exerted a lasting influence on the Republican and Democratic parties going forward. Goldwater's unrelenting critique of the New Deal order—while out of sync with the GOP mainstream at the time—become the guiding philosophy by the Reagan era sixteen years later (Tulis and Mellow 2018). His personal and political roots in the western Sunbelt served as the inspiration for Richard Nixon's "southern strategy," and many of his key personnel and activist supporters—including Phyllis Schlafly, Richard Viguerie, and Paul Weyrich—rose to prominence as the New Right gradually transformed the Republican Party. For the Democrats, "McGovernism" served for decades as a specter haunting the party, empowering moderates like Bill Clinton—himself a former McGovernite—to distance the party from its liberal past. Still, the antiwar positions at the core of his insurgency have remained central to Democratic politics, as has the party's coalitional reliance on middle-class, college-educated progressives (Miroff 2007b). These two examples, as well as the general argument that political losers can nonetheless exert significant agency in reordering American politics, suggest the benefits of a more systematic analysis of (failed) insurgent influence.

There are perhaps no greater losers in American politics than minor parties, especially at the presidential level. Yet a significant literature has agreed that while ultimate victory eludes them, third party or independent presidential candidates can still exert significant influence on American politics and policy making. As I will elaborate below, the claim is well captured by Richard Hofstadter's famous observation that "Third parties are like bees; once they sting, they die" (quoted in Rapoport and Stone 2005, 5)—meaning that if a minor party candidate is successful enough to "sting" or threaten the major parties, the latter will make a concerted effort to co-opt the signature policy issue(s) of the third party's constituency. This results in a paradoxical state of affairs in which third

parties typically fail to win, but often have their core demands at least registered and perhaps addressed by the major parties. As one of the seminal texts on the subject has summarized, "Although adopting their issue clearly steals the thunder from third parties, this is how minor parties have their impact on public policy. Third parties usually lose the battle but, through cooptation, often win the war" (Rosenstone, Behr, and Lazarus 1996, 44).

Below, I extrapolate from the literature on third-party influence to theorize the plausible mechanisms by which *intra*party presidential insurgents affect their host parties, even when they lose their bid for nomination or, having achieved it, fail in the general election. Akin to third-parties' impact on the party system, I argue that insurgent influence on a major party is determined by the interplay of insurgents' "sting" (as aggregate measure for clout) and the party's response. Critically, assessment of insurgent influence requires a *temporal* analysis (Pierson 2004). As V.O. Key (1964, 267) emphasized in his assessment of third-party scholarship,

> each minor-party episode should not be treated as an isolated event unconnected with what followed or preceded [it]. Commonly the analysis of a minor party is restricted to the moment of its climax, with little inspection of its bearing on the stream of party life. [But] the party system exists through time. Judgments of the place of minor parties in the system must be made in the setting of the temporal flow of the system.

Likewise, to identify the place of intraparty insurgents in the "temporal flow" American politics and their influence on the "stream of party life," it is necessary to trace insurgent influence across multiple scales (presidential and congressional elections) and time horizons (multiple nomination or electoral cycles). In the short term of a single presidential election, insurgent influence is often limited by the hostility of the party establishment and the degree to which it can coordinate a

strategic response to quell the challenge. However, over the longer term of multiple election cycles—presidential and congressional—insurgent influence can grow as a result of the uncoordinated but cumulative efforts of ambitious politicians to reposition themselves to take advantage of the organizational and ideational infrastructure left in the wake of the initial campaign or to defensively preempt new challengers.

In sum, the field is ripe for a systematic approach to the politics of party insurgency. Moreover, such a contribution will build on several adjacent and overlapping literatures, refining our theorical understanding and empirical analysis of the interrelationships between parties, movements, elections, and the health of American democracy.

Conceptualizing Insurgency

The term insurgency is employed in a variety of different research contexts, ranging from the sociological study of social movements (McAdam 1982) to the international relations of civil wars (Fearon and Laitin 2003). In the context of electoral politics, insurgency tends to have a know-it-when-I-see-it quality—that is, the term is frequently employed but rarely defined. Even prominent academic studies and works of political journalism on the subject nearly all fail to provide an explicit definition of the concept (e.g., Bloch Rubin 2013; Hilton 2019; Miroff 2007a, 2007b; Peters 2022; Tichenor and Fuerstman 2008). In an important exception, Blum (2020, 6) defines the Tea Party as an "*insurgent* faction," distinguishing it from other types of party faction principally by its combativeness and "willingness to destabilize" its host party as a means of gaining control of it. While her conceptualization is tailor-made for making distinctions among *factions*, the association of insurgency with disruption is critical.

For my purposes, I define insurgency as *a form of contentious collective action that mobilizes a party-transforming coalition through the electoral process*. As shown in Figure 1, insurgency sits at the intersection of three necessary conditions. Below, I elaborate on these conditions in turn.

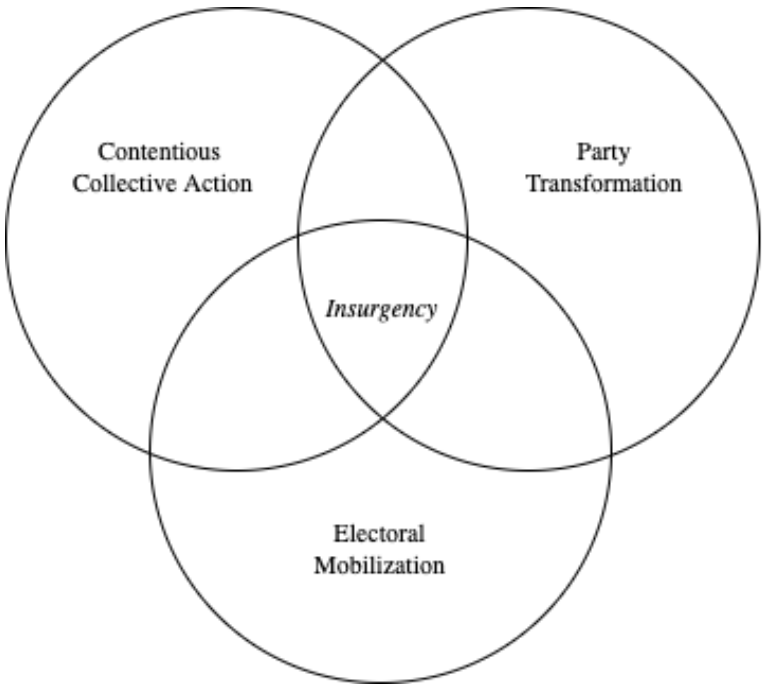


Figure 1. Necessary Conditions of Insurgency

Contentious collective action

Though often focused on a particular candidate, insurgencies represent more than individual attempts to capture the presidency (Busch 2014). Indeed, insurgent candidates are typically identified as "standard-bearers for a broader political movement" (ibid, 466). This collective action dimension is what sets insurgents apart from other ambitious office seekers that may mount a primary challenge against an incumbent for narrower, careerist reasons. While "dark horse" candidates will,

as a matter of course, have staff and organization to operate their campaign, and will typically *claim* to represent a broad constituency, not all will possess genuine attachments to collective movements. Moreover, given that insurgents necessarily operate from a position of weakness—whether numerical, ideational, or (more likely) both—they are in need of significant material and nonmaterial support if they are to mount a nontrivial challenge. Broader collectivities, especially movements, are well-placed to provide these essential resources (Schlozman 2015). Thus, insurgents that are actually lone operators are unlikely register as much more than a blip. Collective action is a necessary condition for any genuine insurgency.

Insurgencies are also contentious forms of collective action. According to Tarrow (2022, 10), "collective action becomes contentious when it is used by people who lack regular access to representative institutions, who act in the name of new or unaccepted claims, and who behave in ways that fundamentally challenge others or authorities." Insurgencies, by definition, rise up against an established authority—what in this context is typically labelled the "party establishment"—by objecting to the party's neglect of specific policy issues, suppression of marginalized identities, or procedural arrangements perceived to be inequitable or unduly oligarchic. Whatever they may be for, insurgents are necessarily against the status quo and the party establishment that is perceived to maintain it, locking the two sets of actors into relations of contention.

Party transformation

Insurgents oppose the status quo, both in politics and policy making generally and in their host party specifically. By changing the latter, they aim to change the former. Within the constraints of the two-party system, transforming of one of the existing major parties—high bar though it is—represents the path of least resistance in pursuit of their ultimate goal. As this implies, insurgents' ambitions reach beyond mere party change. They are not simply "policy demanders" looking to gain a seat at

the table or renegotiate the terms of coalition (cf. Bawn et al. 2012; Karol 2009). Rather, their project is fundamentally *transformational* in character, seeking non-incremental change across all dimensions of the party—institutional, ideational, and electoral. Insurgents thus operate on what Adam Sheingate (2003, 2007) calls the "terrain of the political entrepreneur," and their impact is inherently disruptive of existing party arrangements.

This is not to suggest that insurgents typically *achieve* the kind of party transformation they pursue. On the contrary, most insurgents' reach far exceeds their grasp. However, while no insurgency fully remakes a major party in their image, their ambition to do so both enables and constrains their political project. On the one hand, their far-reaching, transformational politics is what inspires, expands, and shapes the coalitions insurgents build. Without their quasi-revolutionary zeal, insurgents' campaigns would be unlikely to galvanize the dedication of grassroots activists and small-dollar donors required to mount a credible challenge. On the other hand, their ambition of full-scale party transformation sets insurgents on a path to inevitable disappointment. Like all institutions, parties are difficult to change (Galvin 2016). As the formal gatekeepers to governing authority, parties attract the interest of a range of political actors, many of whom have a vested stake in the existing distribution of power and the rules, procedures, and relationships that support it. Insurgents typically find these obstacles to party transformation insurmountable, and end up settling for much more modest forms of party change (if any at all).

Electoralism

Like social movements, insurgencies are forms of contentious collective action. However, unlike social movements or policy-demanding interest groups, insurgencies aim to take office in order to wield the power of government. This necessarily involves interfacing with the opportunities and pitfalls of the electoral process.

By committing themselves to working within one of the major parties, insurgents face two major electoral hurdles. First, insurgents must win nomination in their host party. At the presidential level, the sequence of binding state-level primaries—itself a lasting legacy of previous insurgencies (see Hilton 2021)—creates space for insurgents to make a competitive bid for enough convention delegates to win the party leadership. (Though even prior to the modern period, the caucus-convention system also proved susceptible to insurgent incursions, as seen in Goldwater's 1964 nomination.) While the formal party organization, its leadership, and their interest group allies try their best to clear the field for their preferred candidate during the "invisible primary" (Cohen et al. 2008; Hassell 2018), recent years have witnessed prominent examples of party elites' failing to coordinate to block the nomination of Donald Trump in 2016 or protect incumbents such as Representative Joe Crowley from Ocasio-Cortez's surprise insurgency in 2018.

However, while the primary process creates an opportunity for insurgents to outmaneuver the party establishment and snatch up a nomination, insurgents face the further challenge of winning the general election. The rarity of the phenomenon testifies to the steepness of the climb: at the presidential level an insurgent has won office only once in modern American history—Trump in 2016—and only as the result of an electoral college victory that fell millions of votes short of a popular plurality (see below). More commonly, as witnessed with Goldwater and McGovern, insurgents that make it so the general election are subject to crushing defeats. This is because, unlike many lopsided congressional districts, presidential elections are almost always competitive. Additionally, as minority movements, insurgencies face the disadvantageous playing field of a winner-take-all majoritarian democracy, and the duration of a single electoral cycle has often shown itself to be too little time to convince a plurality of voters to support their iconoclastic views.

Thus, the commitment to mobilizing through the electoral process proves to be a double-edged sword for insurgents: on the one hand, contesting nominations and elections provides a

possible path to power and at the very least the opportunity to educate the public about ideas given short shrift in mainstream politics and policy debates. On the other hand, not only is the electoral terrain an uphill battle, but defeat at either the nomination or general election stages may inflict lasting harm on the broader political movement the insurgency represents.

This definition conceptualizes insurgency as an ideal-type, offering a maximal set of criteria against which any particular case may fall short. Real-world cases (discussed below) may shade more heavily toward one condition rather than the others, or possibly fall short in any one of the three dimensions. Rather than impairing the conceptualization offered here, it may well be that these cross-case variations in "insurgentness" could help explain their varying degrees of influence on their host parties.

It must also be emphasized that insurgencies are not without their internal tensions and contradictions. The diverse coalition of political actors who come together in support of a party-transforming electoral movement carry with them a potentially large range of demands, ambitions, and temporal horizons (Miroff 2007a). Some will lean toward winning office at all costs; others will insist on remaining true to the insurgency's original political vision. How these tensions play out in the course of insurgency and in its aftereffects will depend on the interaction of insurgent agency, the party's response, and the broader conditions of possibility embedded in the political regime.

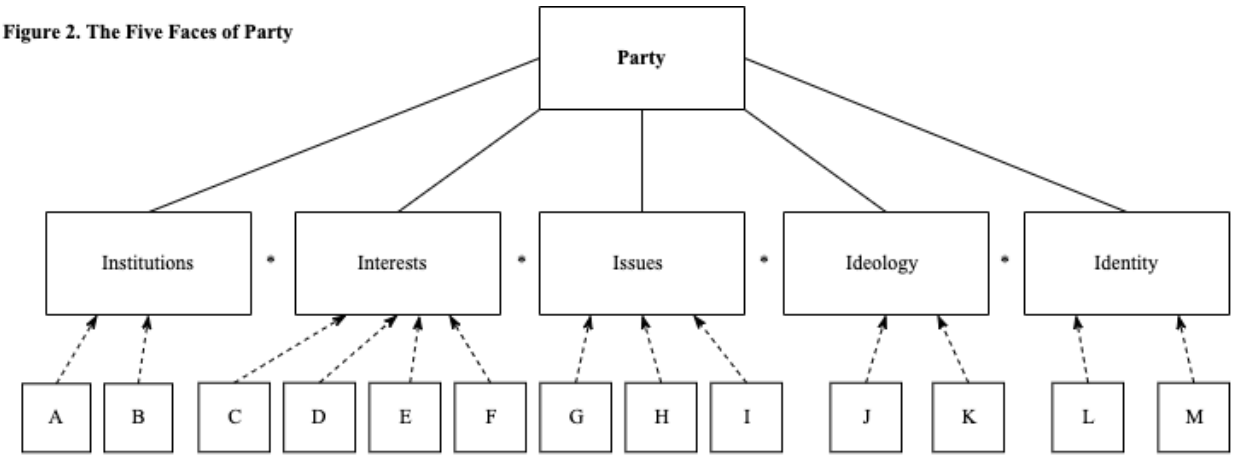
Insurgent-Driven Party Change

If insurgents are an overlooked explanatory variable in shaping the form and content of party politics over time, we need to have clear expectations regarding the outcome variable: namely, party change. Of course, parties change for a whole host of reasons, most of which have nothing to do with insurgents: changes in voter attitudes, preferences, or partisan identification; interest group

preferences and the effectiveness of their lobbying campaigns; social movement mobilizations; changes in leadership personnel; as well as the exogenous shocks of economic, foreign policy, or public health crises—the list goes on. Therefore, beyond merely specifying what party change means, there is the additional counterfactual challenge of identifying when and which forms of party change can be plausibly attributed to insurgents' agency rather than other concurrent causes. In other words, we must ask if certain party changes would have been less likely to happen had it not been for the insurgency in question.

Any definition of party change depends on how parties are defined. The traditional perspective in political science has seen parties as solutions to the collective action problems encountered by politicians in legislatures and elections (Aldrich 2011). More recently, a rival perspective asserts that parties are coalitions of policy-demanding groups located outside of government (Bawn et al. 2012). For the purposes of this paper, it is sufficient to see parties as having five key dimensions or "faces," any of which can be (and all too often is) examined in isolation. But when combined, the five faces provide a comprehensive picture of the party's institutional and ideational order and better help us track the influence of party insurgents. Following Goertz (2020), Figure 2 depicts a semantic map of party, moving from the basic level of the concept at the top to its mid-level core attributes to their data-level indicators at the bottom.

Figure 2. The Five Faces of Party



Legend:

——— Ontological relationship

- - - - - - → Data-level indicator

* Logical AND

A: Party Organizations; B: Nominations; C: Interest Groups; D: Factions; E: Social Movements; F: Extended Networks; G: Policy Positions; H: Issue Ownership; I: Party Brand; J: Public Philosophy; K: Coalition Merchants; L: Political Peoplehood; M: Partisanship

As shown in the diagram, the five faces of party refer to the party's institutions, interests, issues, ideology, and identity (see Hejny and Hilton 2021). As electoral movements aiming to fundamentally transform a major political party, insurgents pursue non-incremental change across all five faces of their host party, operationalized as a shift in any and all of the (non-exhaustive) data-level indicators displayed at the bottom in Figure 2. While insurgent presidential candidates are often easily identified with a signature policy issue that serves as the impetus for their campaign, the broader coalitions they mobilize are host to a range of identities, ideological perspectives, issue agendas, and interests, all of which uneasily combine in the insurgent's coalition. Thus, insurgent-driven party change may be evident across any and all dimensions of the party order, be it formal recognition of newly mobilized identities or the growing salience of a brand-name issue or the reshuffling of factions in the hierarchy of the party coalition.

Moreover, beyond ideational or policy impacts, Tichenor and Fuerstman (2008, 49) draw our attention to the "fundamental procedural ambitions" of insurgents as they seek and sometimes

achieve major institutional reforms that other political actors are compelled to accommodate. For instance, the manifold frustrations of New Politics activists with Democratic Party elites in the late 1960s, and the insurgencies of senators Eugene McCarthy, Robert Kennedy, and George McGovern, produced far-reaching reforms of the McGovern-Fraser Commission, producing the presidential nominating system we are familiar with today (Hilton 2021). More recently, despite his defeat, Senator Bernie Sanders's influence on the Democratic Party produced still further institutional changes, including curtailing the influence of superdelegates in the presidential nomination process. These sometimes-arcane rule changes rarely motivate insurgencies from the start, but they have become the focus of contention when insurgents view them as mutable obstacles in their pursuit of more deeply held goals.

This begs the question of whether these forms of party change were likely to occur independently of the agency and aftereffects of the insurgency in question. In other words, counterfactually, would the party have changed in the specific ways that it did even if the insurgency had not occurred? How can the causal effect be attributed the insurgency with any degree of certainty? Isolating the causal effect of any given insurgency on the processes of party change is a tall order. Like all real-world applications of social science, assignment of treatment and control is out of our hands, and the potential outcome had the insurgency *not* occurred cannot be observed.

A potential solution to this problem is found within the methodological toolbox of qualitative social scientists. Their main source leverage for causal inference is found in the combination of within-case process tracing and cross-case analysis (Goertz and Mahoney 2012). As the next two sections elaborate, we can specify precise mechanisms by which failed insurgent candidates can exert influence on parties and then use the theoretical framework outlined here to construct comparisons of within-case processes to test our hypotheses. In the latter, I will address directly the problem of causal inference for insurgent-driven party change.

Causal Mechanisms and Temporal Dynamics in Insurgent-Driven Party Change

Connecting insurgency to party change requires theorizing the causal mechanisms that plausibly link the two variables together. As stated above, while there are many paths to party change, this section's task is to develop a clear set of theoretical expectations about how insurgencies that fail to capture office or even nomination may nevertheless serve as the driver of party change.

Despite the fact that frameworks for systematic analysis of insurgent influence are hard to come by, we can extrapolate from what the third-party literature has to say about minor party influence on their major party counterparts. While the literature is substantial, perhaps the most systematic theorization is presented by Rapoport and Stone (2005). Again, drawing on Hofstadter's likening of third parties to bees ("once they sting, they die"), Rapoport and Stone (ibid, 5) identify what they call the "dynamic of third parties"—namely, when a minor party generates sufficient electoral clout it "presents the major parties with the opportunity to appeal to the third party's constituency in subsequent elections" (ibid). That is, third-party candidates that threaten the two parties' dominance will likely get crowded out over time as one or both major parties adjust their appeals to absorb the discontented issue constituency revealed by the third party's initial success. Thus, while third parties or independent candidates have never been successful at the presidential level—that is, they have never won the presidency—they have exerted a lasting effect on American politics by indirectly reshaping the behavior of the major parties, even after the third party has disappeared.

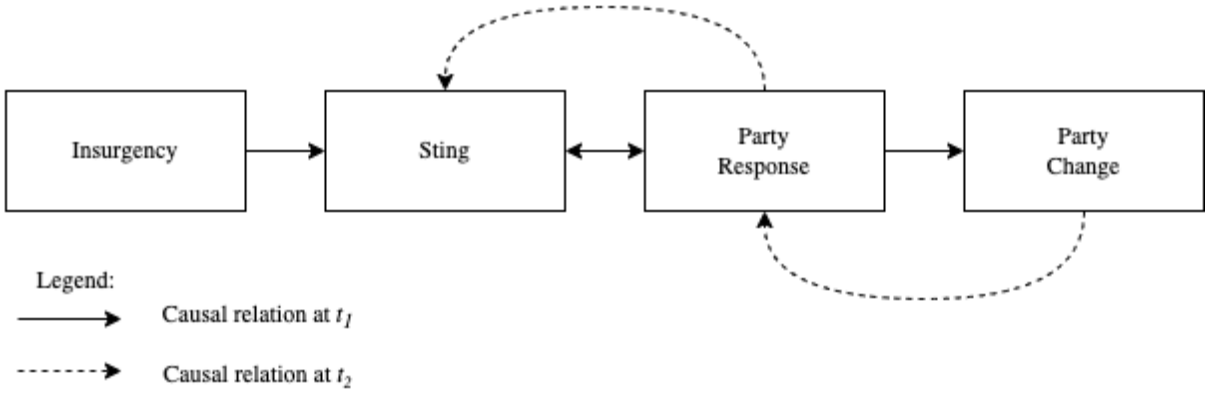
As this theory suggests, the influence of a third party on American politics depends the interaction of two key mechanisms: first, the electoral clout or "sting" of the third-party campaign; and, second, the response of the major parties. Rapoport and Stone (2005) theorize two (non-exclusive) pathways of party response. A coordinated response comes from the party leadership and

can be stated explicitly in official party documents such as platforms or implicitly through roll-call votes that create a public record of where the party stands on specific policy issues. By registering the third-party constituency's signature issue demands or recognizing their identity at the highest level, the party leadership sends a clear signal in the hopes of attracting their votes in the next election, increasing their odds of securing a majority while simultaneously diminishing the electoral threat posed by the third party. Additionally, an uncoordinated response can result from the individual actions of entrepreneurial and strategic politicians, who take advantage of third-party support in their districts to run for office by appealing to that constituency in subsequent elections. If such behavior is widespread, in the aggregate these uncoordinated actions amount to a major-party bid for the discontented constituency—regardless of the leadership's response—injecting their issues and priorities into the major party's brand and agenda.

Of course, intraparty insurgencies and third-party candidacies are very different phenomena. However, while insurgents do not face off against the two major parties in a general election, they do compete with rival candidates and dominant party factions for nominations *within* major parties, making their dynamics sufficiently similar that we can use insights about third-party dynamics to theorize about insurgent dynamics.[1] Indeed, after controlling for their differences, I argue that that insurgent influence, like third-party influence, is an outcome determined by the interaction between insurgents' "sting" and the party's response (see Figure 3).

[1] To reiterate, while not all primary challenges are insurgencies, all insurgencies of the kind discussed here necessarily involve primary contests.

Figure 3. Dynamic Sting and Response Model



Insurgent sting

If insurgents accrue so little strength that they pose little in the way of threat to the party establishment, party leaders and their supporters are likely to ignore them, lest they unwittingly promote the lesser-known candidate by focusing public attention on them. However, as the first linkage in Figure 3 shows, exerting a sufficient degree of sting is a necessary condition to ultimately producing insurgent-driven party change. Insurgents' sting refers to multiple dimensions of political action—ideational, organizational, and electoral—that can independently or jointly challenge the prevailing structure of party authority. Ideationally, insurgents may hit on a salient issue ignored by the incumbent leadership. Organizationally, insurgents may build a powerful campaign infrastructure, networking together new and preexisting groups into a durable base of activist support. Electorally, insurgents with a sufficient amount of sting will have cultivated a significant mass-level constituency. Thus, only by demonstrating significant ideational, organizational, and electoral clout can insurgents force other party actors to take notice and respond.

Party response

The party's response to an insurgent candidate is not all of a piece. Rather, it is likely to vary across two distinct groups: party leaders and their organizational allies (i.e. the party establishment); and non-insurgent party officeholders or office seekers. By definition, the party establishment has the most to lose in the face of an insurgent challenge. The establishment is ruled by the party's dominant faction (or a dominant coalition of factions), its preferred candidate is likely to be an incumbent or at least the leading candidate for nomination, its issue positions are those that define the party brand, and, because winning the general election means controlling the executive, the establishment has the most at stake in the outcome of the nomination. In short, the party establishment has a strong preference for maintaining the party status quo.

Given sufficient insurgent sting, then, the party establishment is likely to respond in a coordinated fashion with resistance, co-optation, or a mix of both, modulating the insurgency's influence on party change. The choice of tactic is partly conditional on the party's incumbency status. To be sure, no party establishment is likely to welcome an insurgent challenge. But an "out party"—that is, a party that does not control the White House—may have greater tolerance for party infighting, whether for the sake of intraparty democracy and a robust hashing out of differences or the willingness to make concessions to new constituencies through low-stakes changes to the party platform. An "in-party," on the other hand, will inevitably view a viable nomination challenge to an incumbent president and party leader as anathema to their priority of retaining the White House. Significant nomination challenges to incumbent presidents are associated with near-guaranteed defeat in the general election (but see Lazarus 2018). Moreover, with control of the White House comes significant institutional resources and opportunities for party leaders to respond to an insurgent challenge by using the bully pulpit to steer the political debate, the prestige of office to maintain a posture of distance, or sufficient control of the policy agenda and administrative state to appropriate insurgent issues or buy off its critical supporters.

But while insurgents run against the party establishment, most party members (e.g. most congressional officeholders or office seekers) do not fall into either camp. These non-insurgents are the bystanders of the contentious insurgent-versus-establishment conflict, who, by their actions (or inactions), play a critical role in determining the scope of that conflict and thus the lasting influence of an insurgency on the party going forward (Schattschneider 1960). Unlike members of the party establishment, who, again, by definition, greet the insurgent challenge with hostility, non-insurgents face a different set of incentives.

Non-insurgents may take the course of inaction, remaining on the sidelines and waiting the conflict out. If this is the case, it is likely to harm insurgents' prospects and grant greater latitude to the establishment's in unilaterally shaping their response. Beyond passive inaction, however, we can imagine three active forms of response non-insurgents are likely make in the face of a robust insurgent challenger. First, they too, like their establishment counterparts, may view the insurgency as a liability or threat, either directly vis-à-vis their own election prospects as the insurgent taints the party brand or indirectly by the insurgent costing the party congressional majorities and effective agenda control. This suggests the potential for the establishment to build a broad "anyone-but-*x*" coalition to oppose and marginalize the insurgency in its bid for nomination.

Alternatively, non-insurgents may view an insurgency as an opportunity to advance their own personal and political goals. While formal primary endorsements are likely to incur significant backlash from the establishment in the (highly likely) event of the insurgent's defeat, non-insurgent politicians may associate themselves with the broader movement's constituency by endorsing its policy goals, accepting campaign assistance from insurgent-supporting organizations, or attending public events in which non-insurgents can demonstrate their allyship (Gervais and Morris 2018). This may be an especially strong incentive for low-ranking officeholders, electoral new comers, or

future presidential aspirants who would benefit from access to the ideational and organizational infrastructure built in the course of the initial campaign.

A third option exists between these two polar responses; namely, non-insurgents—particularly incumbent officeholders—may reposition themselves defensively to preempt the emergence of an insurgent-inspired primary challenge. This could take the form of giving lip service to the issues driving the insurgent movement or demonstrating their allyship via co-sponsorship of insurgent-associated bills in Congress. In contrast to non-insurgents who see the insurgency as a positive opportunity to advance their personal and political ambitions, defensive politicians associate themselves with the insurgency out of the pragmatic attempt to retain the positions they already possess.

Thus, whether association with the insurgent movement is rooted in principle or pragmatism, ambition or defensiveness, the sting of the initial insurgent campaign may instigate manifold responses on the part of differently situated party actors. Their responses may or may not ultimately earn them more votes, campaign contribution, or social media retweets. But the aggregate bandwagoning effect their actions set in train may expand the influence of the insurgency from the presidential to the congressional level and sustain it across multiple election cycles, amplifying its public profile and enhancing its electoral clout in the party order well after its initial defeat.

The dynamics of sting and response

This temporal dynamic of the sting and response model is diagrammed by the dotted arrows in Figure 3. The impact of the initial insurgency on party change is followed by a feedback effect in which the overall party response (establishment response + non-insurgent response) loops back on the insurgent infrastructure bequeathed by the original campaign and exerts downstream effects on the processes of party change. At the theoretical extremes, should the party establishment meet the

initial insurgent challenge with a zero-tolerance policy of all-out resistance, the insurgency is unlikely to have significant short-term effects on party change nor are its downstream spillover effects likely to be substantial. The ideas, discourses, policy proposals, and networks forged in the fires of the campaign would likely remain underdeveloped and unpopular. Prospective politicians and ambitious incumbents would find little appeal in associating themselves with a weak insurgency and opposing a punitive party leadership. At the other extreme, should the party establishment find itself flatfooted or otherwise constrained in its response to an insurgent challenger, non-insurgents may find great value in adopting the insurgency's rhetoric, agenda, disposition, and organizational connections. Moreover, defensive non-insurgents are more likely to reposition themselves as insurgent-friendly to ward off potential primary challenges. The more individual politicians are drawn into association with the insurgency, the more likely it is to continue to sting the party and exert significant effects on party change over time, long after the original campaign ended in defeat.

Potential Cases, Comparisons, and Research Questions

The ultimate value of the theoretical framework outlined above is to guide empirical research on the role insurgents play in processes of party change over time. While detailed empirical analysis necessarily falls outside the scope of this theory-building paper, I will briefly sketch the outlines of a potential research design to be taken up in future study.

As a framework centered on (but not limited to) the direct and indirect causal effects of presidential insurgents on party change, the theory lends itself to small-N qualitative analysis that makes non-random case selection necessary. But given that the presidential nomination process has changed significantly over time, there is no clear numeric threshold (e.g. primary results or percentage of convention delegates awarded) that could easily identify the relevant population of

cases and guide the selection process. Rather, based on what has been said above, identification of relevant cases must be based on a more robust set of criteria.

Because existing scholarship on insurgents is underdeveloped, the overriding goal of case selection must be exploratory and hypothesis generating. The approach I propose here is to build set of comparative case studies that will serve to empirically verify (or inductively amend) the causal mechanisms proposed above as well as to discover any empirical regularities across cases. As such, selecting a sample of cases that vary on the outcome of interest (insurgent-driven party change) will help identify the (potentially diverse) conditions under which insurgents change parties.

Isolating the potential universe of cases to the post-1945 period, eight presidential insurgents present themselves as potentially relevant cases (see Table 1).

Republicans	**Democrats**
Barry Goldwater (1964)	George McGovern (1972)
Ronald Reagan (1976)	Ted Kennedy (1980)
Pat Buchanan (1992)	Jesse Jackson (1984)
Donald Trump (2016)*	Bernie Sanders (2016)

Table 1. Potential Cases of Presidential Insurgents (asterisk denotes deviant case)

Using the conceptualization of insurgency set out above, all eight cases appear at surface level to qualify as genuine insurgencies. The insurgents themselves were identified as representing broader political movements at the time they launched their bids for nomination. In terms of contention, all eight represented non-dominant wings or factions of their host parties. Reagan, Kennedy, and Buchanan directly challenged incumbent party leaders for renomination. While only three (Goldwater, McGovern, and Trump) achieved nomination and made it to the general election, a greater number (Reagan, Jackson, Buchanan, and Sanders) tried for the nomination across multiple election cycles. Only Trump achieved ultimate victory (nomination and election), ironically making his case less relevant as a "legacy of losing" (Tulis and Mellow 2018) and more of a puzzle as to how

he, and only he, managed to achieve what all other insurgents have failed to do. This makes it a deviant case in the context of this research agenda (hence the asterisk in Table 1), but one whose differences may prove especially illuminating in comparison to the patterns and processes identified in the other seven cases.

While the dynamic sting and response model identifies in broad brushstrokes the causal mechanisms at work in insurgent-driven party change, it leaves much underspecified. To put flesh on the bones, we can specify several additional research questions to drive the empirical investigation in specific cases. First, the model leaves open the question of the insurgent candidate's personal agency or leadership. Some insurgents may be eager and zealous presidential aspirants (e.g. Reagan); others may be somewhat reluctant candidates, recruited into an insurgent gambit by preexisting activist networks (e.g. Goldwater, Kennedy). What difference does insurgent leadership play in their influence on the party over time?

Second, and relatedly, what do insurgent candidates do after they fail? Failed insurgents may retreat from their leadership positions (e.g. Goldwater, McGovern, Kennedy) or keep the fight alive after defeat (Reagan, Sanders). This may be because they continue to harbor presidential ambitions and plan to try for the nomination a second time (Reagan, Jackson, Buchanan, Sanders) or they may recruit and support likeminded candidates in down-ballot races (Sanders and Trump). Downstream spillover effects are more likely if failed insurgents actively use their public profile to assist in fundraising and other campaign actions to keep their insurgent ideas, organizations, and electoral constituency alive. What accounts for the different forms of action insurgents take in the aftermath of defeat and how much does it matter in terms of their overall influence on the party?

Third, independent of what failed candidates do or do not do, how do insurgent spillover effects manifest in subsequent election cycles? Despite their failure, a handful of insurgent cases were followed by wave elections that swept likeminded candidates into office. Goldwater's 1964

defeat was followed by the 1966 midterms that put a significant number of conservative Republicans vocally opposed to LBJ's Great Society programs in office. McGovern's 1972 disaster was followed by the 1974 wave election of the so-called Watergate Babies (including former McGovern campaign staffer Gary Hart), which increased liberal strength in Congress and reformed the institution's seniority and committee systems. Buchanan's failed challenge to President George H. W. Bush in 1992 was followed by the 1994 Republican takeover of the House, and Sanders's 2016 insurgency paved the way for the House insurgencies of AOC and Ayanna Pressley. Impressionistic though they are, these connections point toward the value of following Key's advice (1964, 267) to trace the impact of an insurgency beyond the "moment of its climax" by examining "its bearing on the stream of party life." What kinds of connections (if any) can be drawn between failed insurgencies at the presidential level and the seemingly successful downstream aftereffects in Congress or in state-level elections?

Finally, this paper has conceived of party change as a binary variable: either the party changes in the image of the insurgency; or, alternatively, no change is registered. However, there is a third potential outcome: the insurgency instigates party change in the opposite direction of its preferences. That is, insurgencies may set off reactive sequences (Mahoney, Mohamedali, and Nguyen 2016). This goes beyond mere resistance from the party establishment, as theorized above. In that scenario, party elites resist (or strategically co-opt) the insurgent's campaign to maintain the party status quo. Reactive sequences, by contrast, are entrepreneurial political projects in themselves that take the party in the different direction by exploiting the insurgency as an opportunity to reorder the coalition. For instance, Jesse Jackson's two insurgent bids for the presidential nomination in 1984 and 1988 were used strategically by the Democratic Leadership Council and the New Democrats to galvanize support for their centrist project to shed the party brand of its association with 1960s and 1970s movements and interest groups (Baer 2000). To what degree

would the New Democrats have been successful in taking control of the party leadership in the 1990s had it not been for Jackson's insurgencies and the alternative he represented? In general, we must look to see what unintended consequences insurgencies may have on the vector of party change. It is possible that neither insurgents nor establishment figures emerge as victors in their contentious struggle.

Conclusion: The Democratic Ambivalence of Insurgent Politics

This paper has presented a theory of insurgent-driven party change, arguing that insurgent presidential candidates can still change parties even when they lose nomination contests or general elections. These "insurgent legacies" can have durable effects on parties over time, bequeathing ideational, organizational, and electoral resources for use by ambitious office seekers or officeholders who see it in their personal or political interests to associate themselves with the insurgency. The myriad, uncoordinated actions on the part of these non-insurgent actors can, in the aggregate, have the effect of reordering the party over time, altering its institutions, interest group coalition, issue agenda, ideological perspective, and its very identity. Just as the third-party scholarship has concluded that minor parties frequently "lose the battle … [but] win the war" (Rosenstone, Behr, and Lazarus 1996, 44), so this paper has attempted to show that the same may be said for intraparty insurgents.

The paper was prompted by a contemporary political landscape that is simultaneously being reshaped by party insurgents and slipping further down the slope of democratic backsliding. The two phenomena have been explicitly connected. Levitsky and Ziblatt (2018) partly attribute the breakdown of democratic regimes to the failure of parties to act as adequate gatekeepers of political power. When parties fail to keep dangerous politicians out of power, populist or authoritarian leaders can win elections and deploy the power of state institutions to tip the playing field to their

advantage. In the US, parties are, comparatively speaking, weak, and have a long history of criticism directed at their inability to act in cohesive and "responsible" ways (APSA 1950; Fiorina 1980; Rosenbluth and Shapiro 2018). The relative openness of the US primary system for both presidential and non-presidential nominations in particular has come under fierce criticism as promoting polarizing or extremist candidates that appeal to the ideologically motivated and highly unrepresentative electorate in low-turnout primary contests (Jacobs 2022; Polsby 1983). While the empirical basis of these claims has been contested (Norrander 2015), the fact remains that the formal organizations of US political parties do not hold a monopoly over the supreme party task of candidate nomination. Whether or not this necessarily promotes polarization and backsliding, it does leave US parties especially defenseless against insurgent incursions.

Insurgents have been major beneficiaries of America's weak parties. While winning office typically eludes them, they would find themselves excluded entirely in a system with stronger parties or forced to launch minor parties at the margins of the political mainstream. As I have argued above, insurgents need not win to have potentially significant effects on the parties, and therefore the question of insurgents' impact on the health of US democracy must be addressed.

Like the form of guerilla warfare to which it alludes, insurgencies "can be harnessed to diverse political agendas, motivations, and grievances" (Fearon and Laitin 2003, 75), some of which may be pro-democratic, others not. Recent years have illustrated the ideological and political range insurgents can encompass, stretching from the social democratic Bernie Sanders and the Squad on the left to Donald Trump and the Tea Party on the right. Yet, setting aside the content and character of specific insurgencies, even the democratic credentials of insurgent politics in the abstract appear ambivalent. On the one hand, insurgencies have a clear family resemblance to uprisings of those wrongfully marginalized or excluded from the conventional channels of political representation. From this perspective, insurgency can be seen as a form of bottom-up realignment of party politics,

which retethers an oligarchic party leadership to the demands and preferences of its most active rank-and-file members. Insurgency, it could be argued, is what happens when party leaders fail, and insurgents offer a course correction for the two-party system.

On the other hand—and again, irrespective of its particular political character—insurgencies necessarily impugn the legitimacy of party leaders and the institutional structures they govern. This can shade into accusations of corruption that dismiss or demonize political opponents and may even extend beyond specific incumbents to "the system" itself, undermining public trust in government as such. As a result, insurgencies may thereby promote conspiratorial discourses and anti-systemic attitudes that loosen the norms constraining political violence, such as the rule of law and the peaceful transfer of power. Insurgency, it could also be argued, acts as a solvent on democracy, eroding over the long term even as it seems to be revitalizing it in the short term. Of course, elite corruption and representational inequities are real phenomena in American politics, but strong parties are likely no panacea for them.

As a research agenda, this is not the place to resolve these important concerns. Future work on the systematic role that insurgents play in American politics must necessarily confront these profound ambiguities regarding their impact on the quality of representation and democratic governance. Indeed, as a contentious form of electoral movement, insurgency seems to raise in acute form all the ambiguities and dilemmas inherent in democratic politics itself. Thus, the study of insurgency can also contribute to the growing public and scholarly concerns with the major problems facing American democracy in the present.

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