Polarization and Budgetary Volatility in the US Federal Government

Carla Flink
Soren Jordan

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Abstract

Scholarship in punctuated equilibrium theory (PET) has robustly demonstrated that public spending in local, state, federal governments are mostly incremental, but subject to large, expenditure punctuations. More recently, scholars in PET have been trying to understand the conditions of governments and public organizations that increase or decrease the propensity of punctuations. In the development of policy in the US federal government, we have seen how political party polarization can both halt progress and create dramatic shifts. This study revisits a classic question in the public budgeting and political science fields, how does party polarization influence budget stability? Does polarization lead to gridlock or volatility in budget expenditures? In a contribution to the PET literature, we assess how political party polarization can attribute to institutional friction in the policy system.

We examine how party polarization influences annual changes in spending authorizations for the federal budget from 1947 to 2016. We compile expenditure data from the Comparative Agendas Project. Furthering the methods in the PET field, we test our hypotheses with a series of GARCH models to examine how polarization impacts spending volatility among different policy types. Our results indicate that polarization decreases Total Budget Authority volatility. Of the four mandatory subfunctions, three policy subfunctions are statistically significant and negative, meaning polarization decreases volatility. Of the 21 discretionary subfunctions, seven policy subfunctions are affected by party polarization–five where polarization decreases volatility, two where polarization increases volatility. Overall, evidence indicates that party polarization decreases or has no effect on budgetary volatility, suggesting gridlock. To PET literature, polarization does not seem to be contributing to institutional friction leading to dramatic budgetary changes.

1 Introduction

To state it mildly, the United States government has struggled to meet all of the expectations in the annual budgeting process. While blame for budgetary problems has been put on a variety of groups and processes, one consistent theme in the modern era is the inability of legislatures to compromise. We have seen how polarization can halt progress or create dramatic shifts in policy development. At times, party polarization has been an obstacle to finding the "middle" on policy, and thus, policy stays at the status quo. We have also seen how party polarization encourages those in power to take advantage of their moment to make favorable policy shifts. This study revisits a classic question in the fields of public budgeting and political science: how does party polarization influence budget stability and volatility?

We utilize literature in punctuated equilibrium theory (PET) to ground our predictions of budgetary changes. Scholarship in PET has robustly demonstrated that public spending in local, state, federal governments are mostly incremental, but subject to spending punctuations. More recently, work in PET has been trying to understand the conditions of governments and organizations that increase or decrease the propensity of punctuations. In this study, we examine how party polarization–as a measure of institutional friction–influences annual changes in spending authorizations for the federal budget among major policy functions. Results indicate that party polarization has no effect or a negative effect on spending volatility. Thus, there is little evidence to suggest that party polarization is contributing to institutional friction in the policy system and leading to major policy changes.

We contribute to the literature in PET in multiple ways. First, we expand on studies of institutional friction by incorporating a novel measure of political party polarization. Second, we contribute to a growing part of the PET literature that examines budgetary change patterns across policy areas. Most PET research has examine top line expenditures or aggregated all spending areas in analyses. Our methods allow us to observed differences of volatility between the policy areas. Third, we employ GARCH modeling methods to assess the volatility of a policy area over time. This is an improvement to univariate hypothesis testing or other multivariate methods that require scholars to determine cut off points in creating punctuation counts. We make a separate contribution to traditional studies of the effects of polarization in political science. While many scholars have investigated the effects of polarization on substantive lawmaking or representation, there has been little insight into the effects of increase part distance on bureaucratic policymaking, like budgeting.

2 Literature Review

2.1 Punctuated Equilibrium Theory

As a grounding to our study on expenditure volatility, we draw from the PET literature. PET posits that policy changes will be incremental, yet interspersed with large, punctuated changes. Empirically, this theory has been heavily tested in the context of public budgets at the local, state, and federal levels. The robust finding is that public budgets follow the pattern of mostly incremental changes, with a larger-than-expected amount of punctuated expenditure changes (Baumgartner and Jones 2010; Jones et al. 2009; Breunig and Koski 2006). While this study will not focus on measuring punctuations (as is common in this literature), the PET literature can help guide our understanding on what factors contribute to large expenditure changes in governments and public organizations.

In the context of US federal spending, Jones, True, and Baumgartner (1997) find that US federal spending has become less varied over time. This contrasts slightly with True (2000) that illustrates how large budgetary changes are commonplace–a third of the annual budgetary changes (1947 to 1999) in the US national budget authority are punctuated according to their analyses. In another study, Jones, Baumgartner, and True (1998) characterize US spending as three epochs (postwar adjustment, robust growth, and sustained growth) divided by two major punctuations. The authors further find that spending punctuations occur for not only domestic authorizations in overall federal spending, but also for policy subfunctions (Jones, Baumgartner, and True 1998).

The pattern of expenditure changes is not unique to the United States federal government. Breunig and Koski (2006) observe the pattern in the US states. Among the budgets of four countries (Denmark, Germany, the United Kingdom, and the US), Breunig (2006) reveals they also demonstrate the PET pattern. John and Margetts (2003) find a similar pattern among policy functions in United Kingdom expenditure data. Examining spending in both the United States and Denmark, Breunig, Koski, and Mortensen (2010) show how budgetary volatility (measured through L-Kurtosis) varies by policy area. Their work calls on budgetary scholars to theorize on budgetary dynamics not only at top level expenditures of countries, but also at the disaggregated policy level. True (2000) examines several major policy areas of US federal expenditures to show how each has their own unique decision-making subsystem. Continuing this research at the US state level, Breunig and Koski (2012) find that allocational policy areas are more stable and incremental. In an examination at the local budget level, Jordan (2003) provides evidence that non-allocational policies are more punctuated than allocational policy areas.

Contemporary research in PET has moved beyond identifying the overall pattern of change to empirically testing for the factors that increase the likelihood of incremental/punctuated expenditure changes. Scholars have examined such concepts as disproportionate information processing (DIP) (Workman, Jones, and Jochim 2009), the recency of a punctuation (Robinson, Flink, and King 2014; Flink and Robinson 2018), organizational performance (Flink 2017, 2019), and more. The most widely tested concept (and the focus on this study) is on institutional friction–the obstacles preventing the flow of information in the policy process, essential for providing policy adjustments. Institutional friction is theorized to build within the policy system as issues and needed changes are left unaddressed. Eventually, the pressure releases as a major policy punctuation event.

Institutional friction has been measured in numerous ways. Scholars have examined the effects of the bureaucracy by centralization (Ryu 2011), bureaucratization (Robinson 2004; Robinson et al. 2007), and amount of professionalization and discretion (Park and Sapotichne 2020). Other studies have looked at issue complexity and institutional capacity (Epp and Baumgartner 2017) or the phase of policy cycle (Baumgartner et al. 2009). Jones et al. (2009) analyzed the features of political systems across seven countries–executive dominance, single-party governments, bicameralism, and decentralization. Electoral incentives, political institutions, and policy transparency were examined by Li and Feiock (2019). Research by E.J. Fagan (2017) indicates that budgetary punctuations rise with the presence of federalized government systems.

Within this literature, only a couple of studies have examine political party partisanship as a measure of institutional friction. Breunig (2006) analyzed partisan control of government and partisan distance of the assembly to see how they impact the budgets in Denmark, Germany, the United Kingdom, and the United States. In the American context, there was only some support for the partisan control model that strong, opposing preferences among left and right parties leads to punctuations (Breunig 2006). In another study of the US federal government, Jones, True, and Baumgartner (1997) provide evidence that divided government has increased budgetary volatility. In this study, we expand the study of political party polarization as a measure of institutional friction.

2.2 Party Polarization

It is no secret that American elites, especially in Congress, have grown more polarized (Fleisher and Bond 2004; Theriault 2008; Tausanovitch and Hill 2015; Wood and Jordan 2017, for instance). Nascent work on the effects of polarization and legislative productivity generally suggested a conditional relationship, as unified governments might still be productive, regardless of their level of polarization (Jones 2001). More recent work affirms this conventional wisdom, suggesting that shared policy preferences might form the basis for productivity on substantive legislation, even in periods of polarization (Gordon and Landa 2017).

Missing from this account, though, is the effect of polarization on more bureaucratic forms of policymaking, like budgeting matters. Studies of the House of Representatives suggest the use of polarized restrictive rulemaking in administrative programs, implicating the degree to which new programs are made discretionary or mandatory spending (Duff and Rohde 2012; Kasdin 2017, for instance). This effect of polarization on the ease of budgetary lawmaking is further implicated by ideologically extreme minority party members using appropriations amendments to credit-claim in the face of a polarized majority (Reynolds 2019). Even here, unified government in polarized time periods might also incentivize new administrations under unified to cement rulemaking quickly, before future administrations have an opportunity to change the political landscape, leading to exacerbated volatility under new administrations (MacDonald and McGrath 2019).

Changing polarized dynamics of the mass public might further drive budgetary volatility. Although not as polarized as elites, most scholars agree that the public is at least more sorted along party lines Lelkes and Sniderman (2016); Lelkes (2016). Even despite potentially limited sorting on social and moral issues, new research finds that Republicans and Democrats have grown more polarized in their longstanding cleavages concerning economic policy like taxing and spending (Baldassarri and Park 2020; McCarty, Poole, and Rosenthal 2008). These economic cleavages might directly implicate a polarized appetite for budgetary lawmaking, as polarized constituents are much less tolerant of compromise among their politicians, preferring instead a winner-take-all approach (Harbridge, Malhotra, and Harrison 2014; Harbridge and Malhotra 2011; Bauer, Yong, and Krupnikov 2017). This directly suggests that legislators might be perversely encouraged not to compromise on budgetary matters in polarized periods of divided government, leading to protracted periods of shutdowns or other forms of volatility.

2.3 Context–US Federal Budgeting and Political Party Polarization

To understand the effects of institutional friction on the policymaking process, the context of political party polarization in the US federal budgeting process is a good case study. The effects of party polarization in the US federal budgeting process have been on full display in recent years. Conflicts between branches of government, within Congress, and within parties have lead to significant policy disputes that cause delays in the full adoption of the federal budget before the start of the fiscal year. Continuing resolutions have become the norm (McClanahan et al. 2019). Procedural strategies, such as the budget reconciliation, have been used as a way for parties in power to pass legislation with a lower vote requirement (Lynch 2018). Parties have adapted their policymaking (and in turn, budget-making) to match their expectation of little bipartisan cooperation. The delays in setting the budget also have repercussions for how agencies are able to complete their missions and deliver critical goods and services. As one example, continuing resolutions–instead of a full year budget–impact the ability of agencies to make longer term plans for the full fiscal year.

Interestingly, though, the methods used to resolve the inability to pass legislation in the face of polarization might themselves encourage a lack of volatility. Continuing resolitions, by design, promote stasis in policy by continuing funding at current levels. Reconciliation, although it works around the filibuster, is hemmed in by its own set of arcane rules (maybe best illustrated by the minimum wage boost getting cut by the Senate parliamentarian in the 2021 stimulus bill). So while these tools exist to allow policymaking to continue through periods of high polarization, their very structure might speak strongly to a lack of volatility.

Our goal in this study is to examine how polarization shapes the stability and volatility of dollar allocations. Just as delays in funding can challenge agency work, the volatility of funds can create difficulties in quality service delivery. Incremental budgetary changes can create stability in work, but could also make it harder for the agency to grow and adapt to new challenges (Weber 1946; O'Toole and Meier 2003). Large funding cuts generally cause agencies to lose staff and productivity. Large budget boosts, can lead to more hiring of employees, new resources, and increased performance. However a *volatile* budget with many swings up and down in funding, can make it difficult to create stable systems for public service delivery (Flink 2018; Andersen and Mortensen 2010; Meier and O'Toole 2009). Thus, it is not only the absolute level of funding that can impact agency productivity, but the change in funding from year to year. We investigate if political polarization has contributed to volatility of budgetary allocations.

3 Theory and Hypotheses

Bringing together knowledge on institutional friction from a PET perspective and insights from the party polarization literatures, we build our predictions. In the PET literature, it has been demonstrated how high levels of institutional friction contribute to the propensity of punctuations. The friction slows the policy-making process, leading to buildups in the need for policy changes. When changes do finally occur, they happen as large, dramatic policy punctuations. Party polarization has the same potential for slowing the policy making process. Polarization creates more opportunities for disagreement and stalemate. We expect political party polarization to create more friction in the policy system, thus, leading to more budgetary punctuations. However, theory can also suggest that the friction brought by polarization can lead to more incrementalism and decrease the potential for punctuated changes. We address this with two competing hypotheses.

Our first set of hypotheses are:

Hypothesis 1a: As political party polarization increases, US spending becomes more volatile.

Hypothesis 1b: As political party polarization increases, US spending becomes less volatile.

Our study analyzes how different policy areas respond to changes in polarization. It is not expected that each policy area be a party defining issue, where parties would disagree on expenditures. On the other hand, some policy areas will be highly sensitive to partisan politics. We create a generalized second hypothesis, instead of theorizing the mechanisms within each policy subsystem.

Hypothesis 2: As political party polarization increases, US spending becomes more (less) volatile. However, this will vary by policy area.

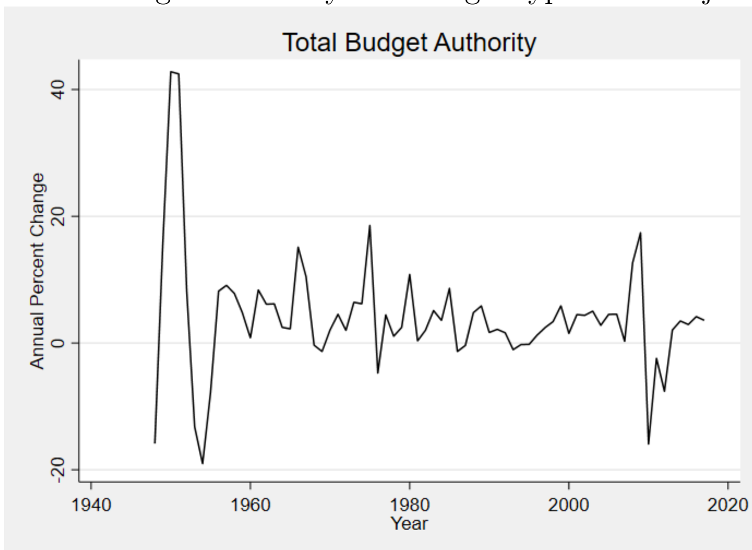
If our statistical models reveal positive and statistically significant results, then Hypothesis 1a is supported. Polarization increases spending volatility and is a strong institutional friction in the policy system. If our statistical models show negative and statistically significant results, Hypothesis 1b is supported. This would indicate that party polarization is not a strong institutional friction.

4 Data

Our US Federal budgetary data come from the Comparative Agendas Project: `https://www.comparativeagendas.net/datasets_codebooks`. We use the budget authority data as annual percentage changes.

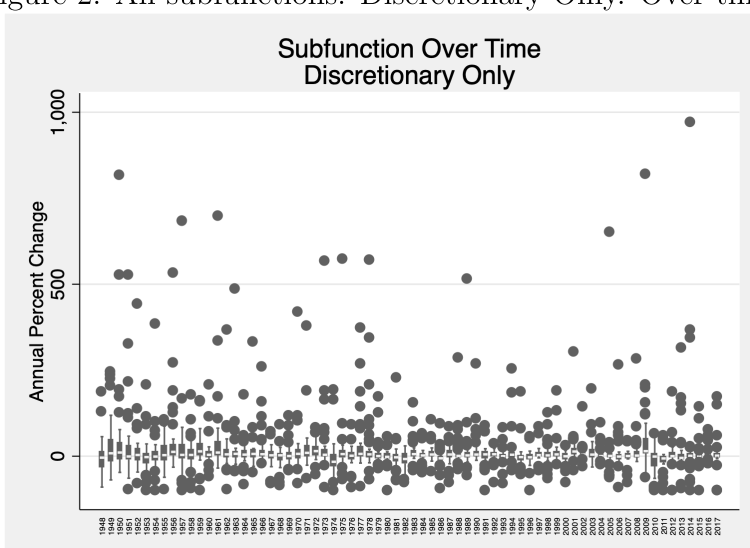
To help understand the data, this is the total budget authority over the timespan of the data.

Figure 1: Total Budget Authority. All budget types and major functions.



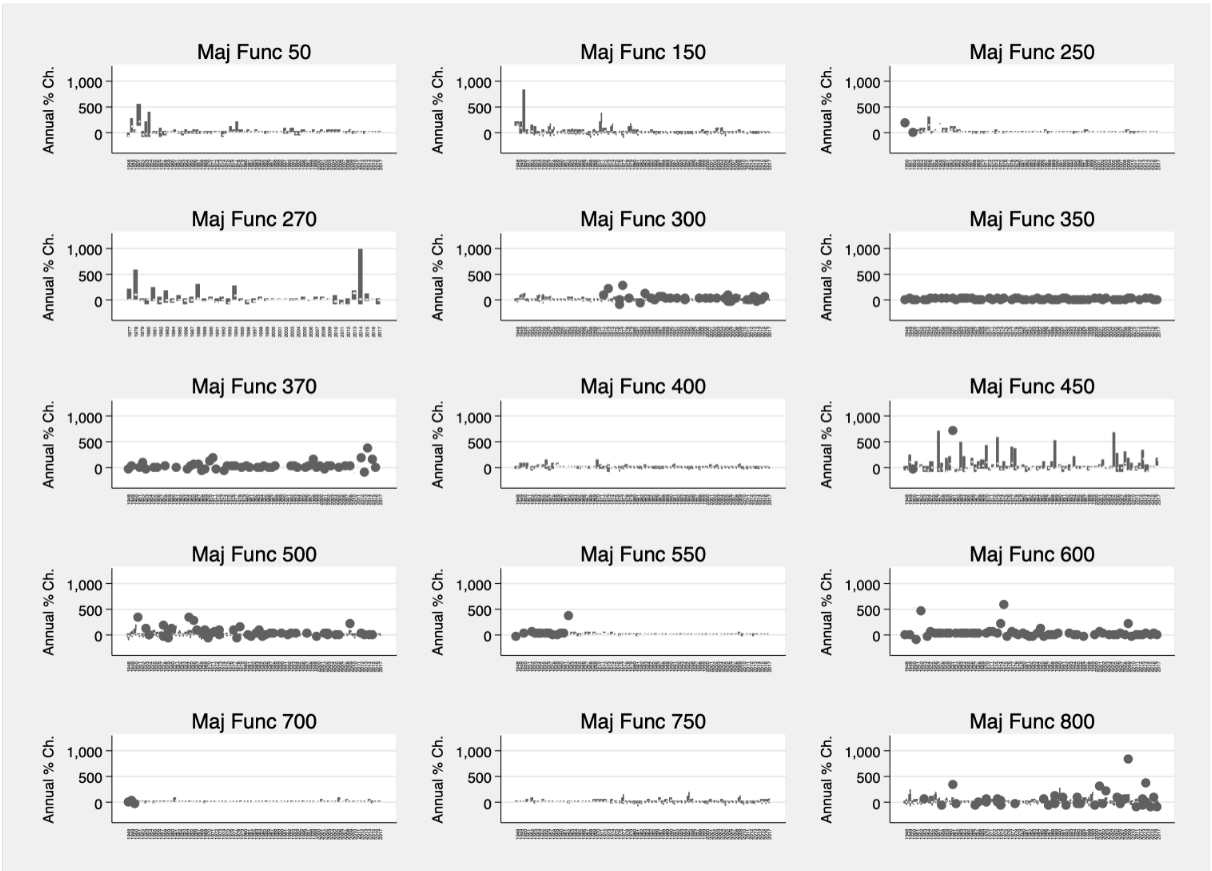
This is the over time box plot for annual spending percentage changes for all subfunctions and for only discretionary spending.

Figure 2: All subfunctions. Discretionary Only. Over time.



This groups the above discretionary subfunctions by major functions. The takeaway from this graph is that each policy area has different ranges of change.

Figure 3: Subfunctions grouped by Major function. Discretionary Only. Cut off at 1000 percent budget change.



The main explanatory variable of interest is polarization. We use a now-classic operationalization of the difference between the median ideal points of the two parties. In addition, we control for various political events that might also affect the amount of friction in the budgeting system: whether Congress is unified, party control of the House of Representatives, and whether the Congress is a "new" unified Congress (i.e. one of the two major parties is taking control of both chambers). The logic is that, if Congress is unified, but *especially* if partisan control is recently established, the two parties will be willing to exert considerable political capital to work on legislative priorities. Depending on the party and the function of government, this could lead to large swings in policy funding.

5 Methods and Results

5.1 Bivariate results

We begin our analysis of the volatility of budgetary changes by conducting a series of simple GARCH models. In each, our goal is just to explore the bivariate relationship between polarization and budgetary changes, so only polarization is entered as a predictor in the mean equations and volatility equations (while also estimating an autoregressive parameter in the mean equation and ARCH and GARCH parameters in the variance equation). Figures 4, 5, and 6 display the estimated volatility coefficients for polarization in each of the sets of GARCH models. In each, the coefficient is shown in black if it statistically significant and grey if it exceeds the traditional 95% level of statistical significance.[1]

[1]Some major functions and subfunctions and do not converge, which is a common problem in "short" ($T < 100$) time series.

Figure 4: Coefficients on Polarization in Bivariate Model on Budgetary Volatility (Major Functions Only).

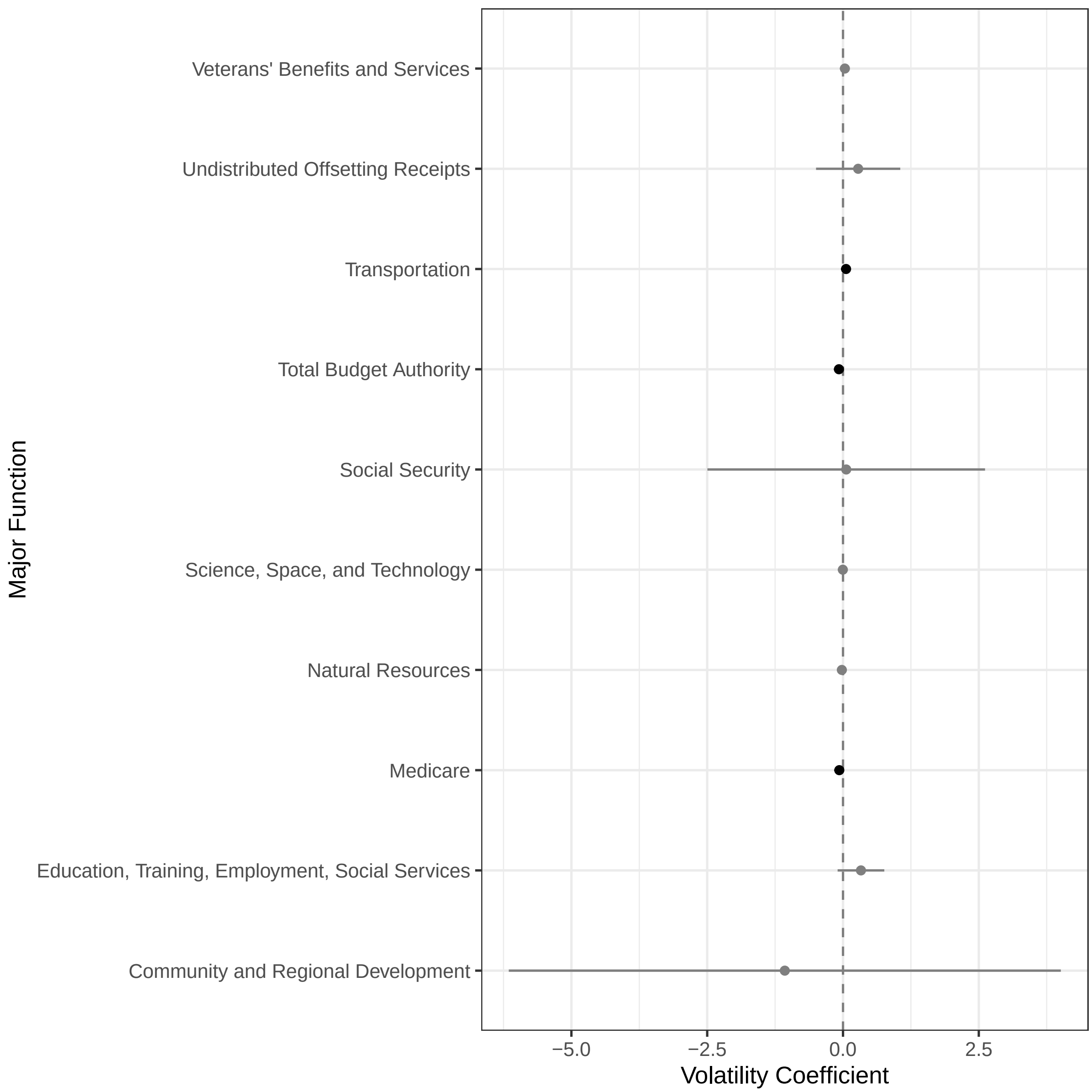


Figure 4 shows the results for just major functions. Most of the estimates are statistically insignificant, save for three major functions. As polarization increases, the volatility of percent budget changes increases, but only marginally, for Transportation budget functions. It actually lowers the budgetary volatility of the total budget authority (across all major functions), as well as the budgetary volatility of Medicare. This echoes traditional suggestions of gridlock, where large government programs are relatively insulated from drastic changes and face more intermediary changes as the two parties grow further apart. There is less common ground for making large-scale changes, which often require super-majority support.

Figure 5: Coefficients on Polarization in Bivariate Model on Budgetary Volatility (Mandatory Subfunctions Only).

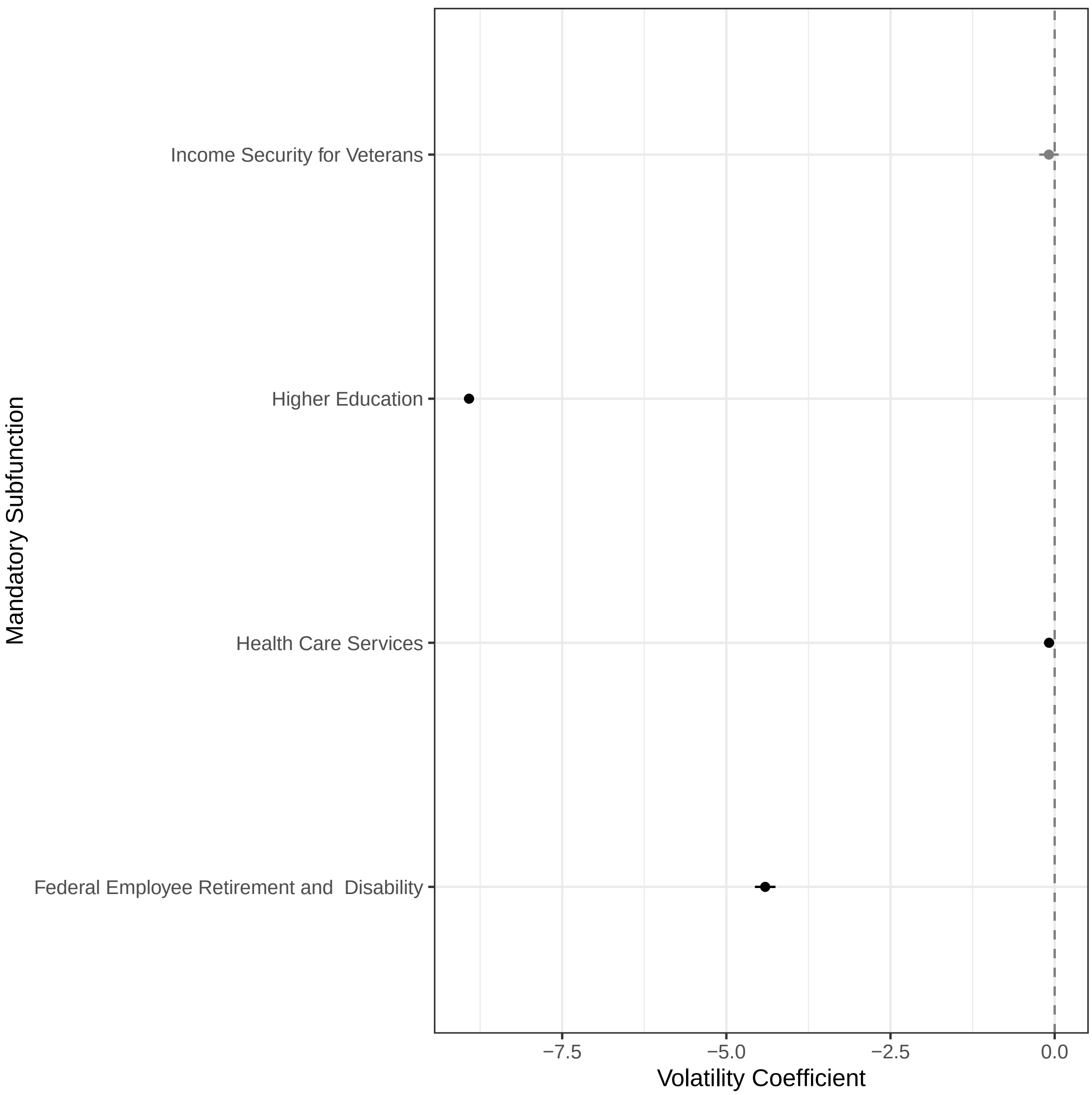


Figure 5 displays similar estimates from mandatory subfunctions. Of the four models that could be reliably estimated, the effect of polarization in each is negative. The effect in three out of four area is statistically significant. The effect of strongest for higher education: as polarization increases, the volatility of percent changes in higher education spending decreases dramatically. The divide between the parties is precluding the ability to make any meaningful adjustments to the budgetary level of mandatory policy areas. These mandatory spending areas more-than-likely are subject to continuing resolutions and funded at the previous' years level, and there's no consensus to make large adjustments.

Figure 6: Coefficients on Polarization in Bivariate Model on Budgetary Volatility (Discretionary Subfunctions Only).

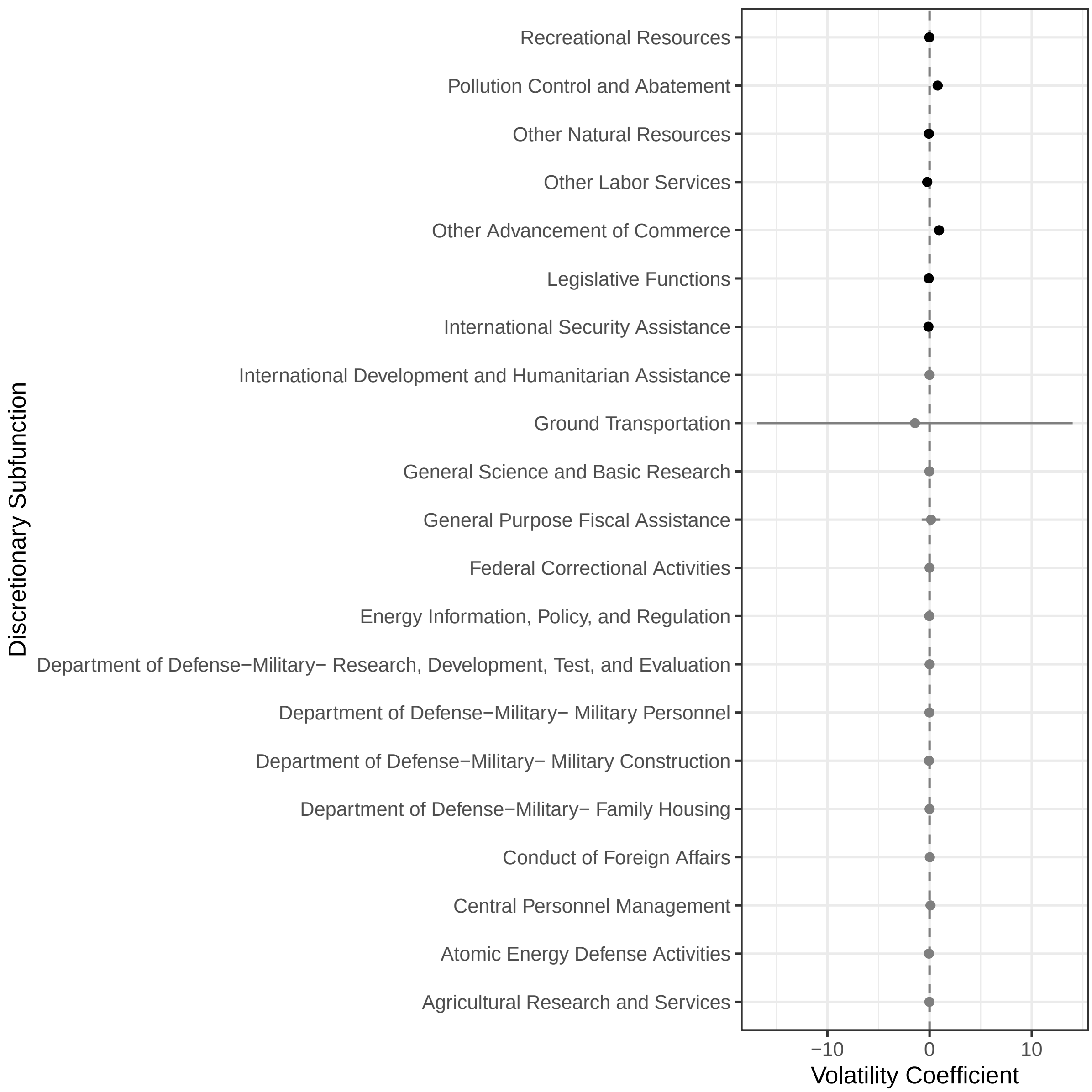


Figure 6 shows the relationship between polarization and the volatility of discretionary subfunctions. For the first time, we see statistically significant positive relationships between polarization and volatility. The strongest areas are pollution control and advancement of commerce, which makes sense: as polarization increases, we see especially large swings in

Table 1: GARCH Model of Volatility of Budgeting

Variable	Estimate	(Standard Error)
Mean Equation		
Polarization	0.069	(0.044)
Unified Congress	0.380	(1.339)
Republican House	-2.657**	(1.099)
New Republican Unified Congress	-0.593	(0.894)
New Democratic Unified Congress	-1.846*	(1.025)
Constant	1.110	(2.482)
AR(1)	0.117	(0.110)
Variance Equation		
ARCH(1)	1.145***	(0.374)
GARCH(1)	0.0401	(0.061)
Constant	6.019***	(1.333)
Polarization	-0.081**	(0.033)
Observations	70	
Log likelihood	-214.5653	

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

budgetary funding of partisan issue areas that are discretionary and not subject to a funding formula, like the environment. Issue areas that are less partisan and more valence, like defense spending, are not subject to changes in volatility due to polarization.

5.2 Multivariate results

Since the dependent variable in the model is the percent budgetary change, the mean equation represents the contemporaneous effect of a one-unit increase in the relevant independent variable. As is apparent in Table 1, only two predictors are statistically significant.[2] When the House is controlled by Republicans, we see significant decreases in the percent change of the funding of total budget authority. Interestingly, when Congress is a *new Democratic* Congress, we also see a negative effect. This is suggestive of a relationship by which

[2]We initially employed a variety of economic predictors, only to find that none of them were statistically related to percent budgetary change.

Democrats are unwilling to fund large increases in budgetary authority, which is opposite of the partisan label we would attach to their priorities. However, this may simply be a function of the external circumstances to which Democrats are responding: for instance the Great Recession in 2009.

The main test of the theory, though, comes in the variance equation. Notice first that the ARCH term is positive and significant, indicating that shocks to budgetary volatility tend to persist, so periods of volatility tend to last beyond just one year. Interestingly, the coefficient on polarization is negative and significant. This suggests that, as polarization increases, we actually see a decrease in the amount of budgetary volatility, or a decrease in the swings of the percent change of total budgetary authority. It seems as if the methods of lawmaking that are "normal" under periods of polarization–reconciliation, continuing resolutions–promote enhanced stability of budgets and undermine the likelihood of any large-scale changes. We saw above that this varies considerably by subfunction. But, even accounting for other predictors, when polarization increases, the volatility of total expenditures decreases.

6 Discussion and Conclusion

PET literature predicts that volatility, as measured by large, punctauted changes, will result after periods of stable, normal spending. Recent polariation seems to have reinforced this pattern: precisely because no party has the ability to generate the super-majority required to make traditional, substantive policy beyond continuing resolutions or reconciliation, budgetary authority has become more routine and less volatile, even as the parties disagree more sharply over what priorities should be funded. Given that polarization seems to be a norm of politics, we should expect this relationship to persist for some time.

There are, however, two caveats. First, it may very well be the case that punctuations depend on the ability of either party to earn super-majority status. It's not that the parties don't *want* spending to be more volatile (in the sense of funding different priorities), it's that neither party can win the necessary share of seats to make those preferences into legislation. The most recent filibuster-proof session–when Democrats had a narrow 60-seat majority in the Senate in 2009–saw the creation of broad substantive policy like the Affordable Care Act. What's missing, compared to that period, isn't the polarization. It's the ability of the parties to work around the super-majority protections.

Second, we focus our analysis at the federal level. At the state level, many parties *do* have super-majority status in their state legislatures. So it could very well be the case that, as polarization increases, volatility of expenditures that reflects the party's priorities increases in tandem. Interestingly, though, as super-majority control becomes more likely, it becomes *far* less likely to observe control of the legislature oscillating between the two parties. In some sense, it's this changing of control that we would expect to create volatility in the first place (as parties rush to make legislation that reflects their own priorities, rather than the priorities of the [distant] other party). In the states, though, it's becoming more challenging to imagine party control of institutions changing with any regularity; at the federal level, it's challenging (but not impossible) to imagine parties winning filibuster-proof super-majorities. So, barring any changes to the "rules of the game," it seems likely that polarization is here to stay, bringing with it a lack of budgetary volatility.

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