

The House Freedom Caucus: A Case Study of Intraparty Organizational Influence

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Abstract

The House Freedom Caucus (HFC) has been credited with exercising substantial political influence since it was formed in early 2015, but very few empirical tests of this claim have been made. I offer three hypotheses about the conditions under which intraparty organizations like the HFC will exercise political and policy influence, and use the Caucus as a case study to test those hypotheses. I find evidence for all three, showing that while Caucus size and unity and the presence of supportive allies lent it external influence, its rules governing membership limited its internal influence. These findings have implications for understanding the conditions under which other intraparty organizations are politically influential.

The House Freedom Caucus (HFC), a group of roughly 40 Republicans in the U.S. House of Representatives, was formed in January 2015 and soon became a major news story of the 114th Congress (2015-16).¹ Many media accounts credited the HFC with creating considerable turmoil in the U.S. House of Representatives by exercising negative power over the chamber's legislative agenda, moving the content of legislation further to the right, and forcing the early resignation of the speaker of the House, John Boehner (R-OH). Its influence was presumably so great that, according to one reporter, HFC chairman Jim Jordan (R-OH) was effectively “the other speaker of the House” (Bade 2016a).

Some studies have found evidence that Caucus membership altered certain kinds of lawmaker voting and fundraising behavior (Clarke n.d., McGee 2017). In this paper, I use both qualitative and quantitative data to build upon these studies, estimating the HFC's influence in the 114th Congress on the voting behavior of its individual members more broadly, as well as its effect on vote outcomes on the House floor, the chamber's legislative agenda and policy outcomes, and the selection of Republican leaders. I also propose a series of hypotheses about the conditions under which congressional intraparty organizations are able exercise influence, using the HFC as a typical case to test them with both statistical and case study data.

I uncover evidence for all three hypotheses with respect to legislative outcomes. Specifically, the HFC's size and unity, or the presence of supportive allies in certain instances, allowed it to make credible threats to alter the legislative agenda or vote outcomes, but because of its internal rules governing membership, it was unable—and more importantly, did not need—to influence the voting behavior of its individual members. However, I find less evidence for the hypotheses with respect to the selection of party leaders, in particular the Speaker of the House,

¹ A Lexis-Nexus search of newspaper articles and columns published between January 1, 2015 and December 31, 2016 turns up 590 non-similar newspaper articles with term “House Freedom Caucus.” See also Clarke n.d.

due to the particular circumstances under which Speaker Boehner chose to retire and his successor, Paul Ryan (R-WI), ascended to the post.

Prior Literature

Congress' history is peppered with examples of lawmakers forming into subgroups within or across party lines. Susan Webb Hammond identifies one important kind of congressional subgroup—the caucus—which is organized, policy-oriented, relatively durable, and not sanctioned by either chamber or party rules. Caucuses may be organized along regional, economic, issue-specific, or partisan dimensions (Hammond 1998, 78- 41). The latter consists of a bloc of same-party lawmakers who share common ideological views and policy goals, and Ruth Bloch Rubin documents the periodic emergence in the House and Senate of these particular kinds of caucuses, which she terms *intraparty organizations* (Hammond 1998, 31-35; Rubin 2017, 3-4). Past intraparty organizations include the House progressive caucus of the early 1920s; the House liberal bloc of the mid-1930s; the Democratic Study Group (DSG), formed in 1959; and the Conservative Opportunity Society, created by Newt Gingrich and three of his colleagues in 1983 (Baer 2017; Fuelner 1983; Hammond 1998, 36-39; Kofmehl 1964; Rubin 2017; Schickler 2001; Weiss 1971).

Prior research has provided considerable evidence that intraparty organizations and caucuses are responsible for significant procedural changes in Congress, recruiting like-minded candidates to run for office, establishing informational networks, shaping legislative agendas, increasing voting participation in key votes, and helping enact or kill specific bills (Baer 2017, DiSalvo 2012, Hammond 1998, Ringe and Nicoll Victor 2013, Rubin 2017, Schickler 1999, Stevens, Miller, and Mann 1974). Some scholars have suggested which conditions are necessary

for intraparty organizations, particularly ones within the majority party, to shape political or legislative outcomes successfully. Rubin, for instance, documents how their organized nature and position as a pivotal voting bloc allows intraparty organizations to achieve desired goals by overcoming collective action problems and exercising leverage (Rubin 2017, 12-13). In her study of the DSG, Emily Baer argues that factional groups must “develop organizationally” in order to bring about changes in chamber procedure, leadership, or policy (Baer 2017, 40). Unfortunately, the impact of these and other possible conditions have yet to be tested empirically.

The most recent, high-profile example of an intraparty organization, the House Freedom Caucus, has been the subject of a few studies. For instance, Clarke (n.d.) looks at the impact of Caucus membership on certain types of floor voting behavior and fundraising, while McGee (2017) considers the role HFC members have taken in developing fundraising networks. Rubin (2017) treats the Caucus as the most recent instance of lawmakers achieving policy goals through organization and the adoption of binding rules. Nonetheless, the group remains relatively under-examined, and its impact on member voting behavior more generally and on actual legislative outcomes remains mostly unexplored.

Hypotheses

Based on the nature of intraparty organizations, prior research, and some basic features of congressional politics, I propose three hypotheses about the conditions under which intraparty organizations seeking to exercise influence can do so internally (i.e. on its own members) or externally (i.e. on other lawmakers and the legislative process). The first is based on the plausible assumption that the rules of an organization have a significant impact on its internal

influence. History suggests that the ability of any organized bloc in Congress to compel its members by edict to act in concert is limited, even when that edict is determined collectively and a binding mechanism is employed (e.g. Green 2002). Nonetheless, an intraparty organization may establish certain “institutional arrangements” that encourage or discourage collective action (Rubin 2017, 12; see also Baer 2017). Those arrangements can vary considerably, but of especial importance are those governing membership and voting unity. If a caucus makes its membership exclusive, an intraparty organization’s members are likely to share considerable agreement on policy matters, so it will seldom be compelled to influence their voting behavior. By contrast, an organization that establishes low barriers to entry and offers reluctant legislators incentives to join will allow potential dissenters into its ranks, testing its ability to impose discipline. In addition, some intraparty organizations impose few or no costs on exiting, making it easy for would-be rebels to leave the organization altogether, while others may establish formal or informal sanctions upon departure (Rubin 2017). If an organization does make it easy to join and difficult to exit, the need to adopt a mechanism to establish and enforce unity in voting is much greater. Thus, we should see intraparty organizations influencing the behavior of its members when admission is relatively open and there are high costs for departure and defection.

Hypothesis 1 (H1): An intraparty organization will exercise internal influence if its internal rules and norms impose high barriers to entry and low barriers to exit, and it imposes enforceable punishments against defectors.

The second hypothesis is derived from the majoritarian nature of the House of Representatives. Since floor outcomes in the House are determined by majority vote, spatial models of voting assume that the median lawmaker serves as the “pivotal player” who can

decide vote outcomes (Black 1958, Cox and McCubbins 2005, Krehbiel 1998). Rubin notes that the pivotal player could also consist of a set of lawmakers from the majority party whose policy preferences are “functionally indistinguishable” from the chamber’s median member (Rubin 2017, 9). Majority party leaders are usually able to incentivize enough of those partisans to vote on measures closer to the party median member, and in particular to prevent defections on procedural votes, a key instrument of the majority’s gate-keeping and agenda-setting power (Cox and McCubbins 2005, Froman and Ripley 1965), Smith 2007). But if that set of lawmakers is able to organize into a bloc that is sufficiently disciplined and sizeable, it may be able to defy those leaders, rolling the majority party (passing a measure over its opposition) or “disappointing” it (defeating a measure it desires) (Jenkins and Monroe 2015, Rubin 2017; see also Finocchiaro and Rohde 2011). Indeed, studies have confirmed that lawmakers closer to the floor median are more likely to defect and less responsive to leadership signals to vote with the majority party (Carson, Crespín, and Madonna 2014; Clarke, Jenkins, and Monroe 2016).

Though lawmakers near the median are most likely to defect, an intraparty organization whose median member’s preferences are far from both the chamber and party medians could also, in theory, be dissatisfied with a policy proposal offered by its own party leaders, desiring an alternative that moves further to the conservative (for Republican) or liberal (for Democratic) direction.² If the organization’s members able to amass independent resources and sources of information to withstand likely punishment from leadership—or are otherwise disinclined towards party loyalty because of their partisan identity or lack of connections with majority party

² This is especially likely with an opposite-party White House, which is unlikely to sign measures closer to the House majority party median than the floor median, or a Senate in which no party has a supermajority, requiring any proposals to be more moderate in order to pass the chamber. Both conditions describe the 114th Congress. See also Krehbiel 1991.

leaders—they may be willing to obstruct the original proposal (Clark n.d., Green 2016).³ More advantageous is an organization’s ability to issue a *credible threat* to obstruct or defect from the majority party (Dixit 1991), convincing leaders that its members are willing to risk retaliatory punishment if they will not move a policy proposal closer to the preferences of its median member.⁴ But regardless of the location of its median member, an intraparty organization’s external influence should be conditional on its pivotal nature, which is a function of its size and unity relative to that of supporters and opponents of a bill or measure.

Hypothesis 2 (H2): An intraparty organization will exercise external influence when it is cohesive and large enough to credibly threaten to shape vote outcomes contrary to the preferences of party leaders.

The third hypothesis applies to efforts by an intraparty organization to exercise influence at the pre-floor, decision-making legislative stage, which is monopolized by committees and party leaders. The most efficient way to exercise such influence is to have allies (if not the organization’s own members) in positions of influence on committees or in party leadership, or to have support from other elected officials whose assent is necessary for legislative success, most notably the president. The presence of those allies can also serve as a basis for issuing credible threats of defection to majority party leaders.

³ One partial example of this from history is the Democratic “liberal bloc” from the 1930s, which tried to force the Rules Committee to release a major wage bill by mobilizing fellow Democrats, suggesting significant rules changes, and even threatening to join Republicans in a cross-party coalition on the floor to block certain bills (Paulsen 1959, 136-37; *New York Times* 1937).

⁴ Threat credibility may also be a function of an intraparty organization’s unity. Rubin (2017) argues that unity follows from an organization’s enforcement of its internal binding rules, but it could also be a consequence of members’ motivational commitment derived from shared preferences. For more on credible (including motivational) commitments in legislative politics and more generally, see North and Weingast 1989, Shepsle 1991, and Wallner 2015.

Hypothesis 3 (H3): An intraparty organization seeking to exercise external influence at the pre-floor stage will do so when it has a wide distribution of its members and allies on relevant committees, in leadership, or support from the White House.

Case Study: The House Freedom Caucus

One approach to testing these hypotheses would be to pursue a large-scale method of difference approach (Mill 2016 [1843]), identifying all major congressional intraparty blocs in a specific period, determining each bloc's influence, and testing the independent effect of potential causal factors. Unfortunately, this is impractical for measuring more complex causal relationships or subtle, less transparent kinds of influence that caucuses are likely to employ, particularly at the pre-floor legislative stage. I instead employ a "typical" case study approach, looking in depth at the House Freedom Caucus as a representative example of an intra-majority party organization in Congress. This method is suitable for both hypothesis testing and deeper analyses of causal mechanisms (George and Bennett 2005; Gerring 2007, 91-97).

The House Freedom Caucus is in many ways a typical example of an intraparty organization. Hammond and Rubin argue that intraparty organizations emerge when a faction of lawmakers possess unmet policy goals and feel dissatisfaction with their party or party leaders (Hammond 1998, 14-18, 40, 45; Rubin 2017, 23). Similarly, the HFC was formed by a group of congressional Republicans⁵ after years of discontent by GOP conservatives about punishments their leaders imposed on dissenters and a perceived lack of influence in procedural and policy-

⁵ The caucus held its first meeting on January 12, 2015 (Disler 2015) and announced its formation and the names of the founding members in a January 26 press release. Its nine founding members were Justin Amash (R-MI), Ron DeSantis (R-TN), John Fleming (R-LA), Scott Garrett (R-VA), Jim Jordan (R-OH), Raul Labrador (R-ID), Mark Meadows (R-NC), Mick Mulvaney (R-SC), and Matt Salmon (R-AZ). Amash had already established another group, the Liberty Caucus, which remained a smaller and less prominent intraparty caucus in the 114th Congress.

making decisions.⁶ The immediate instigating event was the election for chair of the Republican Study Committee (RSC) in November 2014, which conservative candidate Mick Mulvaney (R-SC) lost amid allegations of interference by party leaders (Bade 2016a, Lizza 2015, Newhauser 2014). “The whole purpose of the organization,” said founding member Raúl Labrador (R-ID), was that “we have a lot of people here who feel they are not being heard” (Fuller 2015b).⁷

In addition to its formation, the HFC met the definition of an intraparty organization in Congress in several ways. All of its members were from one party, and the group was decidedly oriented towards influencing shared conservative policy objectives, as made explicit by its mission statement, which endorsed “limited government” and “policies that promote the liberty, safety, and prosperity of all Americans.”⁸ Its founding members were more conservative than the Party average,⁹ and those who joined touted the group’s conservative identity and mission in interviews and press releases.¹⁰ It was also a well-organized bloc with a clear structure and set of rules. The Caucus was led by a board of directors, consisting of the HFC’s founders, which in turn nominated a chairman subject to election by the full group; outgoing RSC chair Jim Jordan (R-OH) was the first elected leader of the Caucus (Bade 2016a, McPherson 2016).¹¹ The HFC instituted a budget funded with dues levied on members, hired an executive director, met

⁶ For more on the intraparty conflict between Boehner and GOP conservatives that preceded the formation of the Freedom Caucus, see Alberta 2017 and Draper 2012.

⁷ There is less evidence that the group was forged for electoral purposes, not least that its membership rolls were private, though some whose membership became public may have benefited from an image that “they are willing to fight harder” (Herszenhorn 2015). However, the members still may have benefited electorally by publicly repudiating their leadership (Binder 2015). For a discussion of the role of (dis)trust in leaders as an instigation of rebellion by intraparty organizations, see Curry 2015.

⁸ <https://www.facebook.com/repjimjordan/posts/10152998342301460>

⁹ The average DW-NOMINATE scores from the 113th Congress of the nine Caucus founders was 0.676, versus the GOP average of 0.484. All but one of the founders had DW-NOMINATE scores at or above the 80th percentile for the Party.

¹⁰ See e.g. <https://meadows.house.gov/media-center/press-releases/conservatives-form-house-freedom-caucus>.

¹¹ The chair served a one-year term; Jordan was reelected to serve a second one-year term in November 2015 (DeBonis 2015b).

regularly, and within six months had established a means of counting members' likely vote choice on upcoming measures (Rubin 2017, 287; French 2015, 2016).

H1 predicts that the HFC should not be internally influential. Caucus membership was by invitation only, allowing the group to exclude any potential dissenters and increasing the probability that its members would be predisposed to share ideological preferences without the need to force compliance (Rubin 2017, 286). Nor did it appear to actively recruit as many lawmakers as possible, but rather sought to keep its size within a certain limit. In fact, while some intraparty organizations offer credit-claiming incentives to would-be members (Rubin 2017, 14), the HFC did not disclose its membership rolls, or at least left that disclosure up to individual members. In addition, the HFC imposed no formal sanctions on lawmakers wishing to exist from the group, and though it did adopt a binding rule, its members could only be bound to a particular policy position by a near unanimous vote (80% of members), minimizing the number of legislators who might be compelled to vote contrary to their preferences (Fuller 2015a).

H2 predicts that, in terms of intraparty organization size and unity, the Freedom Caucus had the capacity to exercise external influence. At the time of its formation, the party balance in Congress was 246 Republicans and 188 Democrats (plus one vacancy). By early February, the Caucus had gained the minimum 30 members necessary to vote with a unified Democratic minority to deny the GOP a floor majority, and it peaked at nearly 40 members by early spring (Disler 2015, French 2015, Fuller 2015b).¹² Though the group's potential unity is difficult to gauge, HFC members who had served in the previous (113th) Congress¹³ had demonstrated remarkable solidarity, voting unanimously on 61.3% of all roll call votes with an average Rice

¹² According to one account, 37 people attended the Caucus' first meeting (Disler 2015).

¹³ 34 HFC members served in the 113th Congress, including lawmakers who served only partially in the 114th Congress.

cohesion score of .869 (just slightly lower than the average Rice score of non-HFC Republicans of .873). As a result of its size and relative unity, it was a potentially pivotal bloc for 50.0% of all majoritarian floor votes in that Congress.

But could the Caucus credibly threaten to alter vote outcomes? Though the group may have hoped to move policy outcomes further rightward by communicating collective policy goals to majority party leaders (Rubin 2017, 286), its median member was too close to the rightmost wing of the Conference to expect to build cross-party coalitions with the minority party, and it was too small to constitute enough Republicans to shape decisions within the Party (Clarke, Jenkins, and Monroe 2016; Rubin 2017, 228). There were four reasons to suspect that the group could credibly threaten to vote with Democrats, however. First, its members' willingness to defy majority party leaders was particularly pronounced. Mulvaney had run for RSC chair on a platform to keep the group from becoming what he termed a "shill for leadership" (Fuller 2014), and the prior voting records of the HFC's founders and members suggested a remarkable fearlessness about openly challenging the authority of the speaker and other GOP leaders.¹⁴ Thus, even if the Caucus would not vote with Democrats on actual bills, its members might be more willing than other Republicans to join Democrats in voting against procedural motions. Second, the group was not afraid to telegraph its intent to vote against majority party leaders, presumably for bargaining purposes. HFC member Matt Salmon (R-AZ), for instance, warned in mid-July 2015 that GOP leaders "have to realize what motivates us and that *there are consequences if you cross a line*" (French 2015, emphasis added). Third, perhaps anticipating

¹⁴ Three of the founding members had voted against Boehner for speaker in January 2015 (Amash, Garrett, Meadows), along with a dozen lawmakers who later joined the Caucus, including Rod Blum (R-IA), Dave Brat (R-VA), Jim Bridenstine (R-OK), Curt Clawson (R-FL), Jeff Duncan (R-SC), Paul Gosar (R-AZ), Tim Huelskamp (R-KS), Gary Palmer (R-AL), Bill Posey (R-FL), Martin Stutzman (R-IN), Randy Weber (R-TX), and Ted Yoho (R-FL). In addition, the founders' second dimension DW-NOMINATE scores, which may have captured anti-establishmentarian, "outsider" tendencies (Voteview 2015), were also near the party extreme: eight of the nine had scores in the 113th Congress that were at or above the 70th percentile for the Party.

retaliation, the Caucus formed two political action committees (the House Freedom Fund and the House Freedom Action Fund) and developed fundraising networks to provide financial support to those denied funds by party leaders (McGee 2017).¹⁵ Fourth, while Congress' high levels of party polarization increased the distance between the median member and the minority party, reducing the likelihood of cross-party voting on policy by intraparty organizations (Rubin 2015, 21-22), it also meant that in the event of majority party defections, majority party leaders would be less able to win minority party votes to make up for those defections.

Finally, *H3* predicts that the Freedom Caucus would have external, pre-floor influence on particular bills or issues for which it could count on well-placed allies. In terms of committee influence, the Caucus' membership was largely concentrated in a single committee, House Oversight, with nearly half of its Republican members (48%) and four of its subcommittee chairs also serving as members of the HFC.¹⁶ We should therefore expect the Caucus to exercise the most influence on legislation under its jurisdiction. Its representation in leadership was more limited. Though it started the 114th Congress with five members who served as whips—Ron DeSantis (R-TN), Jeff Duncan (R-SC), Trent Franks (R-AZ), Cynthia Lummis (R-WY), and Steve Pearce (R-NM)—plus one (Lummis) on the Party's steering committee, no HFC members

¹⁵ These political action committees could have also provided benefits to induce membership, conditioned on its selective membership rules. They also gave the group a means of recruiting over new lawmakers, albeit with limited success (Pathé 2017).

¹⁶ Committee assignment data for the 114th Congress taken from <http://history.house.gov/Congressional-Overview/Profiles/114th/>. Membership in the HFC is derived from three sources that jointly identified 34 lawmakers as members in 2015 (DeSilver 2015, Fuller 2015d, Fuller 2015e). Two of those lawmakers, Tom McClintock (R-CA) and Reid Ribble (R-NJ), resigned from the Caucus on September 16 and October 8, 2015, respectively, and are counted as HFC members until their departure dates. Two additional legislators, Texans Brian Babin and Ted Poe, were identified by Fuller but not by DeSilver as HFC members, but I count them as members because their membership was later confirmed when they resigned from the HFC in early 2017. Two more, Randy Weber (R-TX) (identified by DeSilver but not Fuller) and Ted Yoho (R-FL) (identified by DeSilver and in Fuller 2015e, but not Fuller 2015d), appear to have joined later than other lawmakers. I count them as HFC members starting at the date of their earliest confirmed membership (September 15, 2015 for Yoho and October 15, 2015 for Weber). Finally, two Republicans joined the HFC in 2016: Joe Barton (R-TX), who did so relatively late and is excluded from the analysis, and Warren Davidson (R-OH), who won a special election in June 2016 and joined shortly thereafter.

served in the top ranks of leadership (Hawkings 2015). However, the HFC did have several potential allies who could conceivably lend assistance contingent on the legislative agenda and the calendar, including the 170-member conservative Republican Study Committee (though the Caucus had formed as a rival to it) and, after the November 2016 election, incoming Republican president Donald Trump.

In short, the HFC is not expected to have exercised influence on its own members' behavior, but when it sought to exercise external influence it is expected to have done so successfully when it was large and cohesive enough to sway floor vote outcomes, exercised on matters under the jurisdiction of the Oversight Committee, and exercised on issues that would draw support from the RSC or the White House, if not majority party leaders or relevant committee chairs. In the next section, I discuss the methods used to test these claims.

Methodology

Testing the conditions for intraparty organizational influence requires measuring actual influence. I draw from Robert Dahl's definition of the "first face" of power: actor A has power over actor B if actor A "can get B to do something that B would not otherwise do" (Dahl 1991, Gaventa 1980). If A (in this case, an intraparty organization) successfully exercises that power over B (either members of the organization or lawmakers outside of it), then A has *influenced* B. I infer a causal relationship between an organization's activity and an outcome if the organization's action or demand preceded and is correlated with that outcome, and if there is a plausible link between the two (Shively 2017).

To estimate the Caucus's internal influence, I consider the most important observable behavior of lawmakers: recorded floor votes. Following Hammond (1998),¹⁷ I employ logit regression analysis to predict Republican lawmakers' vote choice on every recorded vote in the 114th Congress with a variable measuring caucus membership and controls for other commonly-cited predictors of voting behavior, including ideology (estimated with first and second-dimension NOMINATE scores), terms served in office, service in party leadership,¹⁸ service as a committee chair, and southern representation. If the Caucus membership variable is statistically significant for more votes than one would expect due to chance (i.e. more than one in twenty, or $p < 0.05$), it would suggest that the HFC was an important independent influence on vote choice. Since correlation is not sufficient evidence of causation, I take advantage of the fact that most HFC members had served in the previous Congress and consider the creation of the Caucus as a treatment in a natural experiment, looking at whether lawmakers voted differently before versus after they joined the Caucus.¹⁹ I thus rerun the same regression analyses for the 113th Congress, with a dichotomous variable equal to 1 if a Republican would subsequently join the Freedom Caucus in the 114th Congress, and compare the results. An important goal of an intraparty organization is to maximize its members' voting loyalty so as to heighten the group's leverage as a pivotal bloc. Therefore, in addition to regression analysis, I compare the rates of voting unity for (future) HFC members in the 113th versus 114th congresses to see if they voted together at a higher rate than one would expect under the counterfactual condition of no Caucus. In addition,

¹⁷ Hammond tests whether membership in one of five caucuses independently influence lawmakers' floor votes on measures deemed important by one of the caucuses. Since few floor votes were cast on measures for which the HFC took a formal position, I instead test the influence of HFC membership on overall voting behavior.

¹⁸ This includes Speaker, majority leader, majority whip, chief deputy whip, Conference officers (chair, vice chair, and secretary), Policy Committee chair, and NRCC chair.

¹⁹ There were, of course, important differences between the two congresses, including party control of the Senate and the nature of the next election (midterm versus presidential). Nonetheless, these differences should not have affected the kinds of individual legislator roll call behavior I examine when comparing both congresses.

I look at whether (future) HFC members voted against the majority of their party more frequently after they joined the Caucus.

To estimate external influence of the Caucus, I use three sets of data. First, to test *H2*, I consider the number of majoritarian roll calls in the 114th Congress for which the Freedom Caucus rolled or disappointed the rest of its party, as well as the number of votes for which it was potentially pivotal, i.e. the outcome would have been reversed had HFC members switched their votes from the winning to the losing side. I also examine the same data for future HFC members from the 113th Congress to consider the counterfactual possibility that those members would have been just as pivotal absent the creation of the Caucus. Unfortunately, this cannot tell us whether the Caucus' *selective* exercise of influence on certain votes was successful. Furthermore, roll call data alone is insufficient to test *H3*, since it posits that external influence is conditional on an intraparty organization choosing to exercise influence at the pre-floor legislative stage before votes are taken on the House floor.²⁰ I thus look at two other qualitative sets of data to test the predictions of both hypotheses. One are the 13 public positions taken by the Caucus in the 114th Congress on House-related matters, using bill tracking and media accounts to determine the ultimate outcome of those positions.²¹ The other are claims from at least two distinct news media outlets, identified via Google news alerts and a Lexis-Nexis newspaper database search, that the House Freedom Caucus exercised or attempted to exercise political influence.²² These claims include HFC members or Chairman Jordan taking a position

²⁰ Unfortunately, the HFC's secrecy and lack of documentation about its internal deliberations makes it difficult to determine its pre-vote unity and decision-making, as has been done in studies of other intraparty organizations (e.g. Baer 2017, Rubin 2017).

²¹ The Caucus also took positions on non-House matters, such as the 2016 vacancy on the U.S. Supreme Court, which I do not consider here.

²² Google news alerts were captured daily between January 1, 2015 and December 31, 2016. To ensure the veracity of these reports, and to ensure no reported allegations of HFC influence were omitted, I also conducted a Lexis-Nexis search of stories about Caucus activity using the term search term "House Freedom Caucus" in the *Washington Post*, *New York Times*, *Politico*, *Roll Call*, and *The Hill* during the same time span.

on a bill or proposal, negotiating with party leaders over the content of legislation or the procedures governing consideration of legislation, or convening the group to discuss a particular bill or issue. I then used media reports, legislative histories, and roll call data to trace the outcome of those efforts.²³

Finally, though my hypotheses apply principally to the influence of an intraparty organization on voting behavior and policy outcomes, the Caucus was perhaps best known for reportedly ousting the Speaker of the House, John Boehner, and acting a veto player in the selection of his successor. I thus also examine the circumstances surrounding Boehner's departure and the role of the Caucus in that departure and his replacement to test those hypotheses.

Results

Roll call analysis confirms the prediction of *HI* that the Freedom Caucus did not compel its members to vote together. The first pair of bars in Figure 1 shows the percent of recorded floor votes for which (potential) Freedom Caucus membership was statistically significant at the $p < .05$ level, using the logit regression models described previously. In the 114th Congress, the percentage is well above what one would expect if the frequency was due to chance (14.4%, or 190 votes), a fact confirmed with bootstrapping.²⁴ However, a greater percentage of floor votes in the previous Congress are explained by the same membership variable (18.8%, or 225 votes), and the difference in proportions is statistically significant ($p = .003$, two-tailed test). This

²³ The method could thus be considered a sort of process tracing, akin to the method used by Rubin in studying interparty organizations, albeit one limited by the availability of data on the private activity of Caucus members (George and Bennett 2005, 206-8).

²⁴ I reran the regression analysis 100 times with randomly selected groups of Republicans of the same size as the Freedom Caucus and found that the average percent of roll calls for which membership in those groups was statistically significant was 5.3%.

suggests that, rather than an independent influence on vote choice, the Caucus served as an institutional marker of the pre-existing voting predilection of its members—and, if anything, the formation of the Caucus *reduced* the frequency with which that predilection shaped vote choice. Further evidence for *HI* emerges when considering unity within the Caucus. As shown in the second set of bars in Figure 1, HFC members voted in lockstep for a sizeable 61.1% of all roll call votes in the 114th Congress.²⁵ Yet as mentioned previously (and shown in Figure 1), future HFC members voted together at a statistically indistinguishable rate of 61.3%, a further sign that HFC membership was conformational, not determinative, of overall floor voting behavior.

A third test of *HI* would be to see whether joining the Caucus leads lawmakers to vote against a majority of their own party more frequently than they might otherwise. Before the HFC was formed, future members voted against their party 57 times (4.8% of roll call votes), and that number increased to 77 times (5.8% of all votes) once they were organized into the Caucus. However, the difference is not statistically significant ($p=0.23$, two-tailed test). More importantly, it is not possible to say whether this increase is due to the Caucus enforcing greater discipline or to a leftward shift of the legislative agenda. The latter seems more likely insofar as it comports with the finding of Clarke (n.d.) that Caucus membership had both a statistically and substantively significant effect on the likelihood of voting against the majority of the majority party on more moderate legislative proposals.

<Figure 1 About Here>

The Freedom Caucus may not have shaped its members' voting behavior, but roll call data indicates that the organization was externally influential. In terms of actual majority party rolls or disappointments, it reversed vote outcomes only twice, defeating a short-term funding

²⁵ The HFC did not reach its maximum size initially. If one looks at just roll calls since June 20, the earliest account of the caucus reaching around 40 members, the Caucus voted unanimously 598 times, or 62.8% of all roll call votes.

bill for the Department of Homeland Security (DHS) (H.J.Res 35) on February 27, 2015, and killing an amendment to another bill (H.R. 4909) on May 18, 2016.²⁶ But the defeat of the funding bill in February 2015 was a major defeat in its own right. It forced GOP leaders to renegotiate a spending package for DHS and sent an important early signal that the group was willing to kill majority party bills on the House floor, thereby making future threats by the Caucus more credible, and also instigated rumors that Boehner's speakership might itself be in danger (see below). Furthermore, the Caucus exercised greater *potential* influence on floor vote outcomes than its individual members might have otherwise. The final set of bars in Figure 1 show the percent of majoritarian votes that would have been reversed had HFC members switched their votes from the winning to the losing side. In the 113th Congress, future HFC members were potentially pivotal on 546 roll call votes (50.0%), but in the 114th Congress, HFC members were potentially pivotal on 687 votes (62.3%), a statistically significant difference ($p < .001$, two-tailed test).²⁷ Greater internal unity does not explain this shift, since the Caucus' members did not vote in unison more frequently than they had prior to the creation of the HFC, and its members' average Rice index score dropped (from .869 in the 113th to .746 in the 114th) even as non-HFC Republicans' average Rice score increased slightly (from .873 to .883). The Caucus did benefit, however, by attracting enough freshmen to its ranks to expand its size, allowing it to potentially sway more vote outcomes. Circumstances also benefited the group. The margin between the two parties was smaller in the 114th Congress, and minority Democrats voted together more often: its average Rice score rose from .843 in the 113th Congress to .901 in the 114th Congress, a higher score than the majority party's.

²⁶ Future HFC members rolled their party once, and disappointed the party twice, in the 113th Congress, all on amendments to an agriculture bill in June 2013 (H.R. 1947).

²⁷ Considering just roll calls from June 20, 2015 (when the HFC's maximum size was first confirmed publicly) to the end of the 114th Congress, the organization was pivotal on 66% of all roll call votes.

A search of media reports and public positions taken by the Caucus to further test *H2* and test *H3* uncovered 19 individual cases of attempted influence (see Table 1). Cases in which the Caucus clearly achieved a desirable outcome are noted in darker shade, with partial or shorter-term victories in lighter shade. While the list constitutes a small percentage of the number of bills considered in the 114th Congress, the cases involved many high profile and substantive bills considered in that Congress, including funding for Planned Parenthood, reauthorization of the Export-Import Bank, a major nuclear deal with Iran, and whether to impeach the IRS Commissioner.²⁸

Note first that the HFC's overall success rate on these issues was fairly high. The Caucus garnered a clear victory in the House in seven instances, another two shorter-term successes (defeat of the DHS short-term spending bill and non-renewal of the charter for the Import-Export Bank), and two partial victories (blocking the Fiscal Year 2017 budget resolution but failing to pass an alternative with less spending, and forcing the full House to vote on a measure impeaching the IRS Commissioner, which was tabled). The HFC was most effective at employing positive agenda power, forcing votes on amendments or legislative initiatives opposed by Republican leaders in four instances (out of six attempts), and at maintaining the policy status quo by blocking initiatives supported by the leadership (in four other instances, one of them temporary, out of five attempts). Less successful were efforts to shift policy from the status quo by enacting, revising, or (in one case) blocking legislation. The organization managed in two such cases to pass a desired bill in the House (the D.C. abortion disapproval bill, and a second, medium-term fiscal year 2017 appropriations bill), but only partial success in a third

²⁸ Of the first twelve, which occurred in 2015, eight were mentioned as major issues by Congressional Quarterly Almanac, and six involved a Congressional Quarterly "key vote" that year. This counts Planned Parenthood funding and the vote on the FY16 omnibus bill twice, though they involved a single key vote, since defunding Planned Parenthood was one of the issues the HFC wanted to add to the bill. If the two DHS funding bills are counted as a single item (as they are by *Congressional Quarterly*), the ratio of mentions is seven out of eleven.

(temporarily ending the authorization of the Export-Import Bank), and it failed altogether in six others (separating a Trade Promotion Authority bill from the Trade Adjustment Assistance program, passing the First Amendment Defense Act, halting all federal funding for Planned Parenthood, adding conservative riders to the 2016 omnibus spending bill, enacting four other HFC-endorsed bills, and making the first Fiscal Year 2017 appropriations bill extend for a longer period).

<Table 1 About Here>

To the extent that the Caucus can take at least some credit for favorable outcomes among these 19 cases,²⁹ can the hypotheses explain its variation in success? Table 2 summarizes, for each case, the Caucus' objective, the proponents of opponents of the measure or issue, if the group's objective was clearly stated by the Caucus as a whole or its chair, what GOP allies (if any) it could rely upon, and whether the HFC was highly unified. The last two columns list the estimated values of two key variables predicted determine the HFC's external influence: the potential for a cross-party majority coalition of the HFC and other lawmakers to against the governing party (*H2*), and the presence and support of allies within the GOP Conference (*H3*). The results are strongly supportive of both hypotheses. The potential to create a cross-party majority coalition on the chamber floor is highly predictive of Caucus success. When that potential existed because the Caucus' strategic goal was shared with Democrats (and, in some cases, the group was also highly unified), the HFC was at least partially successful in 6 of 7 cases. (In an eighth case, the successful defeat of a border security bill met the objective of the Caucus, but the potential for a coalition with the then-brand new organization was unclear.) In the remaining 11 cases, the Caucus lacked the ability to build such a coalition, but in five

²⁹ The final column of Table 2 notes cases in which the causal influence of the Caucus was not entirely clear.

instances it could count on allies in key committees, in leadership, or in the White House, and it achieved at least partial success in four of those cases.³⁰

<Table 2 About Here>

Under the assumptions of the classic spatial voting model, the Caucus' ability to form, or threaten to form, cross-party coalitions with Democrats seems counterintuitive, given its members were far to the right of the chamber median. But this can be explained partly by the Caucus' insistence that that underlying legislation was symbolic or unlikely to be enacted, thus making no change to the status quo, or was too distant from the Caucus median member and should be rejected, even if its enactment constituted a rightward shift in policy from the status quo.³¹ This explains eight instances of attempted Caucus influence.³² In five other cases, the Caucus focused on the rule governing bill consideration, either as a means of rejecting the bill itself or because it prevented deliberation on amendments that would have made the bill more conservative.³³ The consequences of this willingness to reject rules were not lost other Republicans. Warned Devin Nunes (R-CA), "when you vote against rules, you hand the House over to Nancy Pelosi" (Disler 2015), while one HFC member, Tom McClintock (R-CA),

³⁰ Reauthorization of the Export/Import Bank was opposed by the chairman of the committee of jurisdiction, as well as party leaders and the RSC. The D.C. abortion disapproval law was cleared by the HFC-dominated Oversight Committee and supported by a majority of congressional Republicans. The IRS impeachment resolution was first introduced by the Oversight Committee. The second FY 17 appropriations bill was requested by president-elect Trump. The one case in which an ally did not lead to success was the First Amendment Defense Act, in which RSC support was not sufficient to force the committee of jurisdiction to approve the bill. In one other case, Planned Parenthood funding, the RSC supported the Caucus' policy goals but not necessarily its tactics.

³¹ Clarke (n.d.) uses conservative interest group position-taking as a proxy for the conservatism of desired policy outcomes, whereas I use the stated preferences of Caucus members or leaders themselves to determine intent.

³² The Caucus had at least partial success in five of the eight cases: the border security bill, the first DHS appropriations bill, the Fiscal Year 2017 budget resolution, the anti-terrorism bill, and the second FY17 appropriations bill. It failed to achieve desired outcomes in three other instances (the second DHS appropriations bill, Planned Parenthood funding, and the first FY17 appropriations bill).

³³ It succeeded in three of those five instances (with the Fiscal Year 2016 budget resolution, the reauthorization of No Child Left Behind, and the Iran Deal) but failed in two others (the Fiscal Year 2016 budget and the Financial Services appropriations bill).

resigned from the Caucus in 2015 in protest against how its hard-nosed negotiating tactics inadvertently benefited minority party Democrats.

One other variable is worth examining: whether the Caucus or its chair made a formal declaration of the organization's policy or procedural preferences, which could serve as a proxy for the issuance of a credible threat or commitment. As shown in Table 2, in 14 instances the group made its position clear via statements by its chair or the organization as whole, or through negotiations between party leaders and top Caucus members. In eight of those 14 cases, the Caucus also had the potential for a cross-party coalition, at least some support from allies in the chamber or the White House, or both, and it achieved at least a partially desirable outcome in all eight.³⁴ In other words, the group's position-taking yielded fruit when it was credible—backed by the real possibility of reversing a floor vote or influencing legislation at the pre-floor stage.

In short, a study of HFC activity in individual cases in the 114th Congress confirms that the Caucus' influence was determined first and foremost by its ability to join Democrats in voting against bills or floor rules. When it could not do so, it could still achieve at least partial success if support from other key actors provided the Caucus with necessary influence prior to floor consideration of a measure. Under either condition, it was therefore able to issue credible threats against majority party leaders.

Replacing the Speaker

No study of the influence of the House Freedom Caucus in the 114th Congress would be complete without an analysis of what was allegedly its single greatest achievement: hastening

³⁴ In one of the eight cases, impeachment of the IRS commissioner, the Caucus' threat credibility was grounded less in support from the Oversight Committee than in the decision of some HFC members to introduce a privileged resolution of impeachment, which could be brought to the floor at any time, forcing reluctant GOP leaders to have a debate and vote on the measure. See below.

the departure of incumbent Speaker John Boehner in October 2015 and exercising veto power over the selection of his successor.³⁵ A deeper look at the circumstances surrounding Boehner's retirement and replacement suggest that the aforementioned hypotheses provide some insight into the Caucus' role, but that the organization's influence was somewhat attenuated and ultimately depended on its ability to credibly threaten a floor vote undesired by a majority of the Conference.

The groundwork for Boehner's departure had been laid months before, when majority party leaders showed greater willingness in the 114th Congress to exclude conservatives from Conference decision-making and aggressively enforce party discipline. In addition to possibly swaying the outcome of the election for RSC chair in December 2014, Boehner removed two Republicans from the prestigious Rules Committee who had voted against him for speaker in January 2015 (Sherman and Bresnahan 2015). Committee chairs also warned the their subcommittee chairs that they must be loyal to the party on floor votes, and two Republican whips who were (or would become) HFC members, DeSantis and Duncan, quit their leadership posts in early February 2015 after being told that those posts were conditional on voting for majority party procedural motions.

Caucus members chaffed at these crackdowns, and after the first DHS funding bill was defeated in late February in a majority roll (thanks to the defection of 52 Republicans, including 24 HFC members), Boehner's supporters worried that the speaker might be subject to a floor motion to vacate the chair, which if passed would remove him from the post (DeBonis and Kane 2015). When the rule for considering Trade Promotion Authority was nearly defeated in mid-June, three of the 28 Caucus members who had voted against the rule were removed or

³⁵ Of the first 100 most relevant news stories about the HFC in 2015 turned up in a Lexis-Nexis search, the most frequent (22) were about Boehner's retirement and replacement.

preemptively resigned from their whip positions, and one HFC member, Mark Meadows (R-NC), was briefly stripped of his Oversight subcommittee chairmanship before other committee members from the Caucus forced his reinstatement (Fuller 2015c, 2015f; Wong 2015).³⁶

On July 28, 2015, Meadows introduced a privileged resolution to declare the speakership vacant, citing the centralization of decision-making power within the Conference and the use of punishment to discipline Republicans (Lizza 2015). Meadows' move had caught Jordan and other Caucus members off-guard, and for a time it was unclear how many HFC members would support it (Bade 2016a). Meanwhile, a showdown developed between the Caucus and Boehner over funding for Planned Parenthood, and by early September Mick Mulvaney had garnered 31 signatures (22 from HFC members) on a letter vowing to vote against any spending bill that failed to defund the organization—enough Republicans to jeopardize the passage of any future appropriations bills, risking a government shutdown. On September 25, Boehner unexpectedly announced his early retirement from the chamber.

What role did the Caucus play in bringing about Boehner's resignation? Available evidence suggests it mattered primarily insofar as the group made a credible threat to bring to the floor—but not necessarily pass—Meadow's resolution to the floor. Jordan and four other members of the Caucus had met with Boehner the day before his announced departure, and HFC member Labrador later claimed that he told Boehner to resign if he were unwilling “change the way you're running this place” (Lizza 2015). The mere presence of the motion, as Devin Nunes later said, “hung ‘like a sword’ over Boehner's head” (House 2016). However, it was never clear that many Republicans would actually vote for the measure. More importantly, Minority

³⁶ Meadows also complained of other sanctions, such as denial of opportunities to conduct official travel (Dumain and Fuller 2015). Ken Buck (R-CO) recounted how he was nearly removed as freshman class president after his vote (Buck 2017), while Rod Blum (R-IA) was excluded from the NRCC's list of vulnerable incumbents (Cahn 2015).

Leader Nancy Pelosi (D-CA) assured Boehner that enough Democrats would vote present on the motion to prevent a cross-party floor coalition with the Freedom Caucus (Alberta 2017). But the speaker was already unpopular with conservative voters, and he recognized that a vote on the motion would be politically hazardous to the GOP rank-and-file. In a press conference after he announced his retirement, he insisted he was confident he would win on the floor, but “I don’t want to put my colleagues through this...for what?”, a sentiment he repeated in an interview two years later (Alberta 2017; Siddiqui, Jacobs, and McCarthy 2015; Wehrman 2015). Boehner was also, in retrospect, a soft target for the Caucus, having considered retiring before the 2014 elections (Alberta 2017) and, perhaps, hoping that by becoming a lame-duck Speaker he could more easily negotiate with Democrats on appropriations bills to avoid a government shutdown.

For a brief time following Boehner’s announcement, the HFC sought to exploit the impression that it had used its pivotal power to remove the speaker. Chairman Jordan announced the group “would vote as a bloc” on the selection of Boehner’s successor (Fuller 2015gt; see also Marcos 2015), and HFC leaders insisted that speaker candidates commit to rules changes that would curtail the punishment of dissenters and empower the rank-and-file (Boland 2015a, DeBonis 2015a).³⁷ It declined to support the heir apparent, Majority Leader Kevin McCarthy (R-CA), instead formally endorsing Daniel Webster (R-FL), a long-shot alternative.

But the group’s unity quickly frayed. Reid Ribble (R-NJ) became the second member to leave the Caucus, complaining the group should not be involved in leadership selection, and some HFC members said they would still vote for McCarthy (DeBonis 2015a, Dumain 2015a, Fuller 2015g; see also Marcos 2015). The majority leader abruptly withdrew his candidacy the

³⁷ HFC members drafted a memo with proposed Conference rule changes and list of questions for speaker candidates encompassing both conservative policy goals and open procedures and rules changes granting more power to GOP conservatives. Text of the memo can be found in Rubin 2017 and at <https://www.politico.com/f/?id=00000150-49be-d501-ab5d-6dbf7cd70000>.

next day, perhaps in response to the Freedom Caucus or, some later surmised, a letter released by Walter Jones (R-NC) on the same day as his Caucus meeting that insisted lawmakers who had committed marital misdeeds should not be candidates for leadership (Sherman 2015). When Paul Ryan (R-WI) reluctantly threw his hat in the ring, Ryan used his own popularity, his well-known hesitation to run, and the growing urgency to select a speaker as leverage against the HFC. He dutifully met with the group but insisted on its endorsement as a precondition for staying the race, agreeing only in general terms to the procedural changes the Caucus sought (Sherman, Bresnahan, and Palmer 2015; Sherman and French 2015). Worried that failure to support Ryan would lead more Caucus members to exit the group, and that other lawmakers “would be outraged if 39 members stymied their dream speaker” (Fuller 2015i), two-thirds of the Caucus eventually voted to “support” Ryan, and he received the votes of all but six HFC members in the floor vote for Speaker (Sherman and French 2015).

Though Ryan had outmaneuvered the Freedom Caucus, as speaker he followed a “politics of inclusion” model to bring the organization closer to leadership and expand its members’ formal authority (Farrell 2001; Hammond 1998, 76). HFC member Tim Huelskamp (R-KS), who had been booted from the Agriculture Committee by Boehner for past disloyalty, was given a subcommittee chairmanship in the Committee of Small Business and elected to one of the at-large positions added to the Steering Committee after Ryan’s election (Dumain 2015b, Hawkings 2015). The speaker created an advisory committee that included Jordan and Meadows (McPherson and Dumain 2015), opened informal lines of communication with the HFC via text messages, personal meetings, and weekly dinners, and provided campaign assistance to HFC members (House 2016, Sherman and Palmer 2015, Snell 2016).

For a time—perhaps because Ryan was more popular and inclusive than Boehner—the Caucus tempered its negotiation positions and refrained from blaming Ryan for policy or procedural outcomes it disliked. For instance, when the House failed to pass a budget resolution in the spring of 2016, Huelskamp said that “I’m blaming the former speaker. [Ryan] is an heir to the house that John Boehner put together” (Ferris 2016a).³⁸ But the Caucus still issued threats to vote against bills and procedural motions to bring about desired policy objectives, and its members became furious at the speaker when Huelskamp lost his primary in the summer of 2016, blaming Ryan for refusing to put him back on the Agriculture Committee. By the fall, some HFC members discussed voting against Ryan for speaker, linking the vote to meaningful rules changes or appointments to leadership positions, or delaying leadership elections altogether to prevent legislative mischief during the expected lame duck session (Bade 2016b, Snell 2016, Wong 2016). Only after the November elections, which promised a unified Republican government in January 2017, did such discussions dissipate (Bade and Everett 2016).

In short, the Caucus was unable or unwilling to impose discipline on its members for the selection of Speaker, as *HI* would predict. However, its external influence on leadership selection of Speaker was also less than it seemed: the Caucus probably lacked a cross-party coalition to remove Boehner by a floor vote, and its efforts to choose his replacement had little support in the Conference. Rather, the HFC’s ability to exploit the right of any individual member to force a vote on the motion to vacate the chair—and Boehner’s reluctance to put his colleagues at electoral risk by having to participate in the vote—pushed Boehner into early retirement. Peer pressure and the threat of informal sanctions from the rank-and-file led the

³⁸ This deference to Ryan may explain why the Caucus backed off from threats to defeat the rule for considering the Financial Services Appropriations bill after given only vague promises of future opportunities to amend the bill (see Table 2).

Caucus to accede to Ryan's selection, and they remained relatively deferential to his leadership for the rest of the 114th Congress.

Discussion and Conclusion

The foregoing analysis provides evidence for three hypotheses about the conditions under which a congressional intraparty organization can exercise influence. First, to impose discipline on its own members, it must possess internal rules that impose low barriers to entry and high barriers to exit, which maximizes the possibility that potential dissenters will both join and remain in the organization, coupled with an enforceable binding mechanism that keeps those dissenters loyal to the organization. Second, an organization that is potentially pivotal, itself a function of its size and unity, is able to exercise external influence. Third, an organization that seeks to exercise influence at a key pre-floor stage of the legislative process can do so if it possesses allies in positions of influence within or outside the chamber that can lend it outside support.

Because the Freedom Caucus did not meet the first condition, it failed to influence the voting behavior of its own members. However, because it did meet the second and, on some occasions, the third conditions, the organization was able to achieve legislative success on multiple occasions. As HFC member Matt Salmon put it, "if you can unify a bloc, you have incredible ability and I think we've proved that" (Arkin 2016). In other words, the Caucus' primary organizational contribution was not to compel its members to vote together more often, but rather to funnel its members' preferences into official voting positions—including on procedural motions, which are especially susceptible to leadership pressure—and communicate them to majority party leaders as part of a bargaining strategy to alter the legislative agenda or the content of legislation.

To be sure, the group was more successful at some kinds of influence over others. While policy enactments proved elusive to the Caucus, it did successfully exercise agenda-setting power and block undesired changes to the policy status quo. Chairman Jordan admitted as much, noting that the group did not have a record of positive legislative accomplishments but nonetheless insisted that “blocking bad legislation counts as a big success” (Bade 2016). The group also succeeded in nudging Speaker Boehner from office only insofar as Boehner was an unpopular leader among Republican voters and preferred to protect his colleagues’ electoral reputation rather than remain in the House. The latter case underscores an important additional tool available to intraparty organizations: rules and procedures that empower an individual or a minority of lawmakers. The HFC employed the same mechanism when its initial resolution to impeach the IRS Commissioner was held up by the Judiciary Committee, introducing a privileged resolution to spur the Committee to action (and, eventually, forcing the House to vote on the matter).

The true influence of the Caucus may be understated by the evidence presented here. Majority party leaders, anticipating Caucus opposition, may have not even bothered to bring up major bills for consideration. In addition, just as the Tea Party did in earlier congresses (Ragusa and Gaspar 2016), the Caucus may have moved other Republicans, including members of the RSC, further to the right (see e.g. Fuller 2015h). Also, the organization sometimes chose not to exercise its full political leverage or bargain more aggressively. For instance, Caucus members abandoned an effort in late 2015 to draft a “Contract with America II” that would lay out a comprehensive policy agenda, and the HFC largely surrendered its demand for amendment votes on the Financial Services bill in the summer of 2016 (House 2015).³⁹

³⁹ This would follow the pattern of past congressional caucuses that altered their objectives and strategy given changing political contexts (Hammond 1998, 56-62).

At the same time, the Freedom Caucus' story underscores the "delicate position" intraparty organizations face when they oppose their own party on particular issues (Hammond 1998, 124). By definitively choosing to challenge GOP leaders on multiple occasions, Caucus members were subject to attack ads and denied valuable benefits by party leaders. The organization lost two members and drew sharp complaints non-HFC Republicans, particularly after Boehner's sudden retirement. One Conference member complained that "they'd rather rape and pillage than do the hard work" (Parker 2015), while Peter King (R-NY) announced that it was "unprecedented to have this small group, a tiny minority, hijack the party and blackmail the House" (Howell 2015; see also Boland 2015b and Kiefer 2015). Said one Republican staffer in early 2015, "they're not legislators, they're just assholes" (Fuller 2015b).

The analysis presented here leaves open several potentially important lines of inquiry. For example, I do not examine additional sources of influence that HFC may have tapped into, such as outside interest groups and sympathetic Senators like Ted Cruz (R-TX) (e.g. Fuller and Fleming 2015; see also Clarke n.d.). The group may have also exercised influence on electoral as well as policy outcomes via contribution from its political action committees to first-time Republican candidates (e.g. Gehrke 2015). In addition, a more detailed analysis of how the HFC negotiated with party leaders in individual instances may give us further insight into the bargaining process that is central to Congress (Binder and Lee 2016). Especially noteworthy was the Caucus' willingness to take conflicts over bill content and the legislative agenda to the floor—conflicts that are usually resolved within parties—which, while giving the HFC additional bargaining leverage, also risked the majority party's collective reputation and Caucus members' relationships with their colleagues. Finally, the validity of my hypotheses about intraparty organizational influence have yet to be tested against other examples in congressional history.

As of this writing, the Freedom Caucus has not only has continued to flex its muscles after the 2016 elections but has seen a number of its members promoted to prominent executive branch positions, including Mick Mulvaney (to head OMB), Jim Bridenstine (nominated to head NASA), and Scott Garrett (nominated to lead the Export-Import Bank). In addition, under its new chair, Mark Meadows, the Caucus appears more open to negotiate legislative compromises with party moderates, such as a “repeal and replace” health care bill that narrowly passed the chamber in the spring of 2017. Though the Caucus by all accounts remains a central player in congressional politics and national policy-making, time will tell whether the HFC’s bargaining strategy and unity changes under these new political conditions, and what that tells us about the influence of intraparty groups more generally.

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Figure 1. Measuring the Influence of HFC Membership on Floor Votes

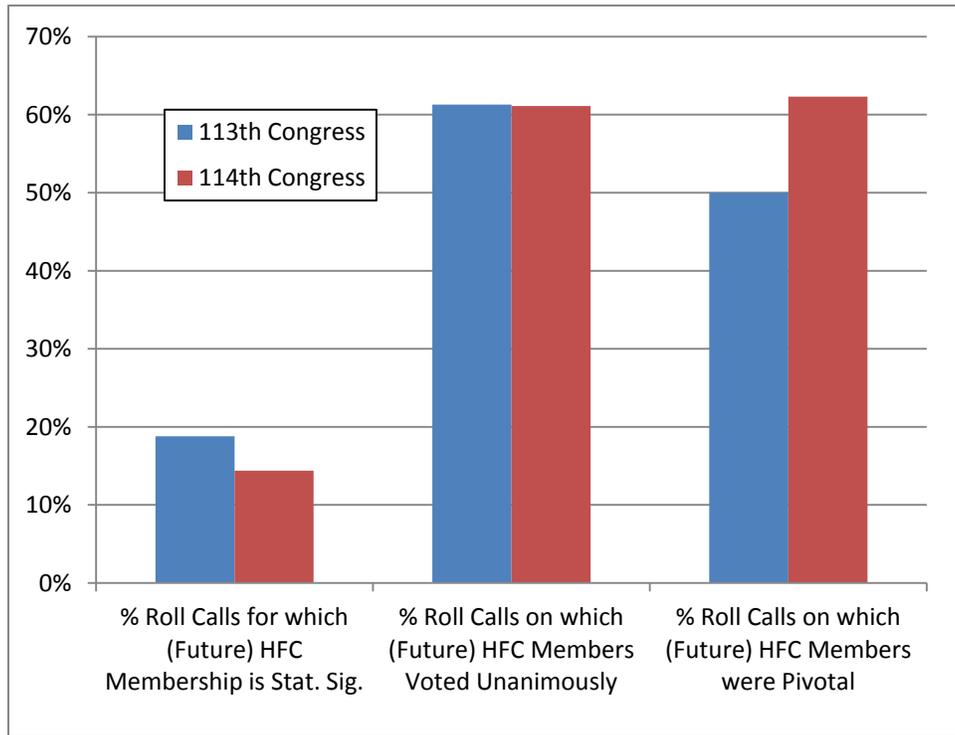


Table 1. House Freedom Caucus Activity on Legislative Measures, 114th Congress

Measure/Issue	HFC objective	HFC role	Activity	Target	Official HFC Position?	Outcome	HFC Vote(s)	Nature of Win	Caveats
Border security bill*	defeat	members	oppose bill	bill	no	bill pulled from floor indefinitely	n/a	keep SQ	size, role of HFC uncertain
FY16 DHS Appropriations (1st bill)*	defeat	members	oppose bill if fails to overturn WH immigration order	bill	no	short-term bill fails	n/a	keep SQ (temp.)	size of HFC uncertain
FY16 DHS Appropriations (2nd bill)*	defeat	chair, members	see above	bill	no	long-term bill passes	0-38	n/a	
FY16 Budget resolution*	allow amendments	chair, members	insist on rule that permits votes for budget alternatives	rule	no	votes permitted on alternatives, leadership budget passes	33-5 (original budget) 31-7 (RSC budget) 27-11 (leader budget) 32-6 (final passage)	agenda	
D.C. abortion law disapproval	pass	full caucus	officially support	bill	yes	resolution passes, fails to become law	35-0	shift SQ (in House)	possible role of RSC
No Child Left Behind reauthorization*	allow amendments	members	insist on rule that allows votes for amendments	rule	no	bill delayed, votes on amendments permitted, bill narrowly passes	X (rule) 21-15 (final passage)	agenda	role of HFC uncertain
Reauthorization of Export-Import bank*	block	full caucus	officially oppose	bill	yes	reauthorization expired between July and October	8-30 (bill including authorizatio	shift SQ (temp.)	necessity of HFC uncertain

						2015	n)		
Trade Promotion Authority*	pass alternative, change House rules	chair, members	support on condition of concessions	bill	no	no concessions given, rule narrowly passes, bill narrowly approved (twice)	9-28 (rule) 15-23 (1st version) 15-22 (2nd version)	n/a	
First Amendment Defense Act	pass	full caucus	officially support	bill	yes	bill referred to committees	n/a	n/a	
Iran nuclear deal repeal*	pass alternative		officially oppose, demand delay until WH reveals “side deals”, consider opposing rule	rule & bill	yes	initial resolution pulled, votes on three other measures held	38-0 (side deal res.) 0-38 (to approve) 38-0 (sanctions)	agenda, shift SQ (in House)	role of HFC uncertain
End funding for Planned Parenthood*	pass in approps bill	full caucus	officially support, circulate pledge to vote against funding, offer amendment to final spending bill	bill	yes (3)	anti-funding bills pass House, but final budget maintains full funding	0-40 (bill) 0-40 (budget agreement) 4-36 (FY16 budget)	n/a	
FY16 Omnibus Appropriations	add conservative riders	chair, members	propose amendments to bill	bill	no	Rules disallows amendments	4-34 (bill)	n/a	
FY17 Budget resolution*	defeat, pass alternative	full caucus	officially oppose if fails to impose additional cuts	bill	yes	bill delayed indefinitely	n/a	keep SQ	RSC is first mover
Anti-Terrorism bill*	defeat	full caucus	oppose bill	bill	no	bill delayed indefinitely	n/a	keep SQ	HFC opposition tardy
Financial Services bill	allow amendments	members	oppose rule if fails to permit amendments	rule	no	promise to allow amendments to other bills, but never happens	37-1 (rule)	n/a	
First Amendment	pass	full caucus	officially support	bills	yes	bills referred to committees	n/a	n/a	

Defense Act + Four other HFC bills									
FY17 Appropriations (1st bill)*	defeat, pass alternative	chair, members	oppose short-term bill, add conservative riders	bill	no	short-term bill passes	12-29	n/a	
FY17 Appropriations (2nd bill)*	defeat, pass alternative	chair, members	oppose short-term bill, add conservative riders	bill	no	medium-term bill passes	25-16	shift SQ	Trump requests same outcome
Impeachment of IRS Commissioner*	pass	full caucus	officially support, demand hearings, introduce privileged resolution	bill	yes (3)	committee hearings, forced floor vote, resolution referred to committee	3-32 (to refer to committee)	agenda	non-HFC member is first mover

Source: Jim Jordan press releases; Fuller 2015a, 2015b (for public positions); and news reports.

* = uncovered via news reports

Table 2. Testing Conditions for Caucus Influence

Measure/Issue	HFC Objective	Proponents	Opponents	HFC or Chair Takes Position?	HFC Highly Unified?	Key GOP allies	Variables of Interest	
							Potential for Cross-Party Coalition?	Key Allies in Chamber/WH?
Border security bill*	defeat	GOP	Dems	no	n/a		n/a	no
FY16 DHS Appropriations (1st bill)*	defeat	GOP	Dems, HFC	no	n/a		yes	no
FY16 DHS Appropriations (2nd bill)*	defeat	Dems, some GOP	some GOP, HFC	chair	yes		no	no
FY16 Budget resolution*	allow amendments	GOP	Dems, HFC (rule)	chair	n/a		yes	no
D.C. abortion law disapproval	pass	GOP, HFC	Dems	HFC	yes	committee (Oversight)	no	yes
No Child Left Behind reauthorization*	allow amendments	GOP	Dems, HFC (rule)	no	n/a		yes	no
Reauthorization of Export-Import bank*	block	Dems, most GOP	some GOP, HFC	chair, HFC	yes	committee (chair), RSC, party leaders	no	yes
Trade Promotion Authority*	pass alternative, change House rules	GOP	Dems, HFC	no	no		no	no
First Amendment Defense Act	pass	GOP, HFC	Dems	HFC	yes	RSC	no	yes
Iran nuclear deal repeal*	pass alternative	GOP	Dems, HFC (rule & bill)	HFC	yes		yes	no

End funding for Planned Parenthood*	pass in approps bill	some GOP, HFC	Dems, some GOP	chair, HFC	yes	RSC^	no	no [^]
FY16 Omnibus Appropriations	amend to make more conservative	some GOP, HFC	Dems, some GOP	chair	yes		no	no
FY17 Budget resolution*	defeat, pass alternative	GOP	Dems, HFC	chair	n/a	RSC	yes	yes
Anti-Terrorism bill*	defeat	GOP	Dems, HFC	HFC	n/a		yes	no
Financial Services bill	allow amendments	GOP	Dems, HFC (rule)	no	n/a		yes	no
First Amendment Defense Act + Four other HFC bills	pass	GOP, HFC	Dems	HFC	yes		no	no
FY17 Appropriations (1st bill)*	defeat, pass alternative	GOP	Dems, HFC	chair	n/a		no	no
FY17 Appropriations (2nd bill)*	pass	GOP, HFC	Dems	chair	no	President-elect	no	yes
Impeachment of IRS Commissioner*	pass	some GOP, HFC	Dems, some HFC	chair	yes	committee (Oversight)	no	yes ^{^^}

Dark shaded rows are cases in which the HFC achieved a desired outcome; light shaded rows indicate partial success.

^ The RSC supported the policy outcome, but not the HFC's tactics to achieve them (i.e. voting against all spending bills).

^^ The HFC-dominant committee introduced a measure to impeach the IRS Commissioner, but further action came only after the HFC threatened, and then used, a privileged resolution to force a floor vote on impeachment.