IN 1981, A YOUNG POLITICAL scientist at the University of Georgia named James E. Campbell received a query from Newt Gingrich, who represented his state in Congress. Could the professor prepare a report for the Republican National Committee about the 1934 midterms? At the time, that election was the answer to a trivia question: the only midterm since the Civil War during which the party controlling the White House gained seats in Congress. But Gingrich thought Republicans developing his party's 1982 strategy could learn from a more detailed account. Campbell, who had briefly worked as a Republican staffer on Capitol Hill, returned with an explanation that flattered his client's sense of the moment: When Franklin Roosevelt introduced the New Deal during his first two years in office, he set in motion a partisan re-alignment that insulated Democrats from a midterm backlash. Gingrich and other ambitious Republicans hoped that Ronald Reagan's election would prompt a similar realignment in their favor.

Case studies of historical anomalies have limited career value for political scientists, whose discipline focuses on rules, rather than exceptions. After submitting his report, Campbell decided to turn his attention to the pattern itself. What was the real reason, as he put it, that "like clockwork," midterm elections reduce the number of seats held by the president's party?

Most of Campbell's fellow scholars subscribed to the "referendum" theory of midterm elections. Presidents, the theory went, are swept into office on hopes that they inevitably fail to fulfill; in midterms, the voters who swung their way swing back in disapproval. (This thesis was developed by Edward Tufte, now better known as the philosopher-king of infographics.) Journalists and politicians still favor this interpretation, since it's easy to view the messy array of federal, state, and local elections as a reflection of the familiar face in the Oval Office. Democrats were walloped in 2010, goes the thinking, because the country soured on Obama's stimulus and health care bill; Republicans withstood such a fate in 2002 because George W. Bush had successfully rallied public opinion in the wake of 9/11. Every midterm outcome is supposed to say something meaningful about what the country believes.

Before Tufte came along, however, another interpretation of midterm outcomes prevailed. This theory was known as "surge and decline," and it was introduced in 1960 by University of Michigan political scientist Angus Campbell. (The Campbells are not related.) Angus Campbell had been part of the team that produced the canonical book The American Voter, and in understanding midterm dynamics, he thought it made sense to separate the electorate into two groups: core voters who regularly cast a ballot and had developed partisan loyalties, and peripheral voters who are less concerned with politics but may be activated if the stakes seem high. Campbell's peripheral voters are swing voters in the loosest sense: Not only do they alternate between parties, but they also drop in and out of the electorate. Presidential campaigns, Campbell argued, "bring a surge of peripheral voters to the polls," and the candidate who draws more of them wins. In the next congressional election, most of those peripheral voters stay home, and so the party in the White House fares worse. James E. Campbell ultimately concluded that both models are right, but they apply to separate constituencies. For independent-minded voters without strong loyalties, off-year congressional elections are indeed a referendum on the incumbent president. Partisans, however, follow a surge-and-decline dynamic—if they become disenchanted, they won't defect to the other party. They simply don't vote in the next election.

In 1994, Gingrich gave James E. Campbell and his fellow political scientists another confounding case study. Under the then-minority whip's strategy, Republicans won 54 House seats, taking back the chamber for the first time since 1954. Republicans also captured eight Senate seats, giving them a majority there as well. None of the models—neither referendum nor surge-and-decline nor Campbell's hybrid—predicted such a wave. With the notable exception of Gingrich himself, Campbell observed in his book The Presidential Pulse of Congressional Elections, "(N)o one expected Democrats to lose so many seats" that year.

Up until then the political science models had assumed that both parties' coalitions contained a similar mix of regular and sporadic voters. But the political realignment that began in 1994 has disrupted that...