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# "Building the Plane While Flying It": Negotiating Tensions in an Emerging Hybrid Organization

A dissertation submitted in partial satisfaction of the

requirements for the degree Doctor of Philosophy

in Communication

by

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June 2020

"Building the Plane While Flying It":

Membership, Structure, and Tensions in an Emerging Hybrid Organization

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by

Avigail McClelland-Cohen

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On a somber note, I would like to remember one of the RU organizers who participated in this research who, in the spring of 2019, died due to complications from coronavirus. I know from my observations and participation how much he was loved by his community and how deeply he will be missed. I am thankful to have known him.

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This project explores, in part, the power and strength of relationships cultivated during times of great political and personal hardship. Sometimes, the bonds that form during political action transform fellow activists into friends and, when we are lucky, those friends become a tribe. I have been lucky beyond measure to have found family amid the chaos of

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# ABSTRACT

“Building the Plane While Flying It”:

Membership, Structure, and Tensions in an Emergent Hybrid Organization

by

Avigail McClelland-Cohen

As institutions decline and digital networks take frontstage in activist efforts, the role of formal organizations is changing in ways that implicate the sustainability and success of activist involvement. Historically, formal organizations have played a critical role in activism and social movements by helping to overcome the free-rider problem (Olson, 1965) and by serving as breeding grounds for civic leaders (Skocpol, 2003). One way they accomplished these aims was through the use of *transformational repertoires*, or “deep organizing” activities aimed at cultivating bonds among participants and developing novice activists into leaders. Today, however, involvement in formal civic organizations has declined and movement activism is increasingly organized through distributed networks. Networked movements rely more heavily on *transactional repertoires*, or activities rooted in cost-benefit analyses aimed at increasing participation through relatively shallow strategies. As a result, they can be fleeting and do not necessarily produce seasoned leaders who become stewards of their communities.

In this changing landscape, the organizations that do persist often incorporate *hybrid* strategies, engaging members through a combination of both formal and informal structures (such as bureaucracy complemented by a distributed network). Existing research suggests that hybrid organizations may present interesting opportunities for negotiating oppositions (Jay, 2013). Thus, in addition to incorporating multiple structural types, hybridity may enable members to negotiate other oppositions such as the tension between transactional and transformational repertoires and the tension between volunteer and professional leaderships. I explore these possibilities through a two year long ethnographic study of an emerging hybrid grassroots organization, Resistance United (RU).

Findings suggest that tensions relating to structures, repertoires, and leaderships intersect and influence the structuration process in RU, including the ways members constitute their involvement in the organization and reflexively adapt structures to meet their needs and goals. Though RU follows some patterns that have previously been observed in civic and social movement organizations, such as the tendency toward formalization and professionalization (which in turn pull toward transactional repertories), I also illustrate new possibilities relating to hybridity including the potential for volunteer resistance to punctuate the cycle of increasing professionalization and the possibility that intersecting tensions afford unique opportunities for negotiation. I discuss the role that formal organizations continue to play in cultivating civic leaders even in a networked society and present considerations for both grassroots organizations and their members.

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## I. Introduction

On December 1, 1955, a seamstress named Rosa Parks took a seat on a bus in Montgomery, Alabama. As many history books tell it, Parks was tired from a long day of work when she sat down in the whites-only section at the front of the bus and refused to move to the back (Theoharis, 2013). Parks was arrested for her actions as dictated by state law. Her arrest sparked a thirteen-month boycott of the Montgomery bus system by Black passengers, culminating in the Supreme Court ruling in *Browder v. Gale* (1956) declaring Alabama laws requiring racial segregation on buses were unconstitutional.

Popular narratives of the Civil Rights movement focus on large, visible actions like the bus boycotts, the March on Washington for Jobs and Freedom in 1963, the pilgrimage of activists into Mississippi for voter registration drives during Freedom Summer in 1964, the marches from Selma to Montgomery that culminated in Bloody Sunday in 1965, and, of course, Dr. King's "I Have a Dream" speech to a crowd of roughly a quarter million people. These narratives uplift the visible, meaningful, and emotional moments that are captured so poignantly in iconic photographs and video footage. The protest activities captured in the popular narrative constitute one repertoire of activism: the *transactional* repertoire (Han, 2014), which involves mobilizing as many people as possible by reducing the costs to participants for their involvement. For example, Civil Rights organizations coordinated with taxi services to alleviate the challenges and costs of bus riders' participation in the Montgomery Bus Boycotts (Theoharis, 2013). By reducing the barrier to entry and costs of participation, the transactional repertoire enables large-scale mobilizations like those that have become emblematic of the Civil Rights movement.

But these popular narratives are missing a key part of the picture. As civil rights icon and scholar Julian Bond argues, the Civil Rights movement should not be pithily distilled as it has by historians and popular cultural narratives into "Rosa sat down, Martin stood up, and the white kids came down and saved the day" (quoted in Hogan, 2013, p. 224). This caricature of the movement fails to represent the true breadth of activist labor that drove the movement. Rosa Parks was not just a tired seamstress; by the time she sat down in the whites-only section on that December day, Parks had been training and working as an organizer for decades; in the months leading up to her now-famous arrest, she had planned the action carefully with fellow organizers in the movement (Theoharis, 2013).

Though Parks' seemingly simple action of taking a seat helped to spark one of the key events in one of the best known social movements in United States history, that spark was the result of years of work drawing on a different type of activist repertoire than the one portrayed in most Civil Rights iconography: the repertoire of *transformational organizing*. This type of activity involves deep relational work through which activists train and develop as leaders, cultivate interpersonal and community bonds, and solidify commitments that will enable them to take part in high-stakes, high-cost activities in pursuit of social goals (Han, 2014). For Rosa Parks to take a seat in a whites-only section meant opening herself up to violence and almost certain arrest. This type of high-stakes activity required an activist who was connected to others in the movement through deep solidarity bonds. In the less-visible history of the Civil Rights movement, transformational repertoires were common, including storytelling circles, organizer trainings, and mutual aid programs to strengthen bonds among community members. Importantly, formal organizations often play a significant role in enacting transformational strategies (Han, 2014); in the Civil Rights movement, these

included the Southern Christian Leadership Conference (SCLC), local faith-based organizations (primarily churches), and associations of legal professionals.

In short, Civil Rights organizers would likely not have accomplished what they did had it not been for a combination of *both* transactional *and* transformational repertoires. Deep organizing work in the transformational repertoire enabled participants to develop the bonds and commitment they needed to take on seemingly insurmountable forces, while mass engagement in highly visible marches and rallies drawing on the transactional repertoire enabled the spread of unrest to a scale that could not be ignored or put down fully even with the full might of the military state. The Civil Rights movement thus illustrates how, while the two organizing repertoires involve competing and contradictory logics, it is the combination of the repertoires that enables activists and organizers to accomplish social change.

The Civil Rights movement is just one well-known example of social movement efforts drawing on these repertoires. Other movements, historical and contemporary, similarly draw on both types of repertoires to accomplish their goals. In the nuclear disarmament movement, for example, those seeking to reduce or eliminate nuclear weapons stockpiles during the Cold War engaged in large, highly visible protests (transactional); exerting pressure on Members of Congress and other government representatives (transactional); and radical civil disobedience such as activists chaining themselves to nuclear facilities, which required the cultivation of high levels of trust and solidarity among those putting their bodies on the line, often developed through close-knit *affinity groups* (transformational) (Rubinson, 2016). Environmental and climate activists engage in similar strategies.

However, these organizations and activists operate using limited resources, and cannot engage in all types of activities or repertoires at once. As they focus their activity in pursuit of their goals, they must decide which activities and repertoires to prioritize in any given moment. This situates the repertoires in tension, and negotiating that tension is a key function of social movement and civic leaders.

### A. *Civic Engagement in the Changing World*

Since the Civil Rights Movement, the contours of membership in constituent-based organizations, and the ways social movement actors organize themselves, have changed significantly. Scholars have highlighted social shifts including the decline of institutions, including federated civic organizations that were once considered the breeding grounds of democracy (Putnam, 1993) as well as religious institutions that fueled earlier movements like the Civil Rights Movement; and the rise of networked society (Castells, 2000) and new forms of membership and protest. Today, the organizations in which people like Rosa Parks trained and organized might look quite different; in contemporary organizing, networks are foregrounded as institutions decline.

As the traditional institutional backbones of civic life disintegrate, new forms of participation emerge including networked and crowd-based protests (Juris, 2012; Kavada, 2015). Black Lives Matter, in some ways the contemporary offspring of Civil Rights activism, takes a starkly different form than its predecessors—the form of a distributed network drawing on *hashtag publics* (Woods & McVey, 2016). Networked protests can be stunningly large, but the commitments they require are fleeting, and as a result, the extent to which membership becomes incorporated into participants' identities can be minimal; protest identities can be adopted and discarded as easily as a Facebook avatar (Gerbaudo, 2015).

Though networks seem capable of harnessing the transactional repertoires required for mobilizing large crowds, scholars and activists alike wonder whether they can accomplish the deep transformational change necessary to cultivate long-term commitments.

Despite this shift toward networked forms of organizing, rather than vanishing, formal organizations have persisted and found ways of incorporating networked strategies into their work, constituting hybrid forms (Bimber et al., 2012). Why is this so, and, more importantly, what do formal organizations contribute in today's networked landscape? With so many opportunities for distributed, networked activism, what draws people to the formal organizations that emerge amid networks, what benefits do formal structures offer to members, and what potential do they hold for meaningful member engagement in the digital age?

Literature suggests that not all forms of formal organizational membership are created equal. While traditional civic organizations such as federated membership groups once served to train members in the democratic practices at the core of civic engagement (Putnam, 1993; Skocpol, 2003), contemporary organizations often offer shallower forms of membership. With the rise of networks and the decline of institutions, many constituent-based organizations have shifted toward a reliance on "checkbook members" (Painter & Paxton, 2014). These members contribute financially to formal organizations and in doing so support their missions, but do not participate in organizational governance or decision making in the same ways as did members of traditional federated structures. Checkbook members do not train to be civic leaders by participating in the leadership of their local federated chapters. Thus, while they may provide necessary support for accomplishing organizational-level goals, checkbook members do not fuel a civic leadership pipeline in the

same way as did members of federated or community structures and organizational leadership may not be as closely linked to the goals and preferences of their members.

There may then be reasons for concern, on the part of social movement organizers and scholars interested in understanding the changing dynamics of civic life, for the future of civic leadership in a networked society. Whether or not formal organizations of some sort are necessary prerequisites for a strong civic foundation, it appears that formal organizations whose power rests on shallow membership structures like checkbook members do not represent the type of foundation needed to foster rich civic life and social movement participation. If organizations are a key factor in fostering civic leadership, changing structures of membership may be implicated in the decline in civic participation.

In an environment in which people can participate in social movement or other civic activity in easy, fleeting ways without having to make a deeper commitment (e.g. networked protests, rallies, or donations to formal organizations), it may seem surprising to see some people drawn to deeper forms of membership. And yet, an interesting phenomenon has emerged: the development of formal constituent-based organizations emerging from networked contexts in which (some) members (can) play a far greater role than mere check-signing. One such organization, Resistance United, is the focus of the present study.

Resistance United emerged from the massive wave of activism brought about during Donald Trump's ascension to the U.S. presidency in 2016. Protests began the day after the election and continued for months. On January 21, 2017, the day after Trump's inauguration, the Women's March—a direct response to the Trump presidency—occurred on all seven continents globally and was likely the largest single protest ever in U.S. history (Broomfield, 2017). Protest signs at the event suggested a broad base of participants, many of whom had

never previously been engaged in protests, but who found and negotiated meaning together through their participation (McClelland-Cohen & Endacott, in press). As Trump settled into office and began rolling out a series of policy proposals that many had previously considered unthinkable, the activism continued: hundreds of people spontaneously descended on major airports across the U.S. to defend immigration; rallies popped up to protest new tax schemes that would tax graduate student stipends and deal a blow to higher education; and Members of Congress found themselves suddenly spotlighted by protesters in their home districts aiming to hold accountable the checks-and-balance system of the U.S. government.

The response to Trump's presidency was both like and entirely unlike the Civil Rights movement. Trump represented many of the same ideological positions held by anti-Civil Rights leaders in the mid-20th century, but the threat Trump posed was also far broader. It was not only Black Americans or even people of color more broadly who feared for their safety under a Trump presidency—it was also immigrants, LGBTQ people, women, the working poor, those seeking a sustainable climate future, and more. And all of these groups were connected by the technological advances characterizing the digital age: rapid communication technology, social media, and digitally enabled networks.

From the networked protests responding to Donald Trump, organization emerged. Several groups of activists published online guides to lead novice activists through the steps of engaging in social movement activity and civic life; in a couple of cases, groups began forming around these guides, and from some of those groups, formal umbrella organizations developed.

The members of these organizations were not checkbook members. Instead, they were people—many of them first-time activists—who seized the moment of national crisis,

stepped up and, often surprising themselves, came to act as leaders in their communities. Three and a half years later, some of them have developed into committed civic leaders embedded not only in their activist groups but also in their larger organizations, communities, and movement networks.

What led these people to make a more formal commitment to organizational life in this networked age when identity can be so fluid and shifting? What forces helped maintain their commitment and scaffolded their ascendance to leadership roles? What do they gain or lose by participating in formal organizational structures rather than as members of informal networks? This study seeks to understand some of those questions by understanding the contours of membership and leadership in contemporary constituent-based organizational structures.

### *B. Membership and Organizational Structure*

Broadly, organizational structures can include a range of types spanning from highly formal to highly informal. Formal structures are typically codified, standardized, or otherwise made explicit, whereas informal structures represent emergent, nonstandard patterns of communication and relationships such as social networks. Organizations can fall on a spectrum from formal to informal and can incorporate a variety of different structures within that range. Even a highly formalized bureaucratic institution, for example, will still involve some informal relational patterns that emerge among members.

Commonly, social movements include both formal organizations and informal networks. The Civil Rights movement, for example, involved formal structures such as the National Association for the Advancement of Colored People (NAACP) and the Southern Christian Leadership Conference (SCLC); it also involved informal relational structures

connecting community members to each other, such as storytelling circles. Some structures, such as the Student Nonviolent Coordinating Committee (SNCC) began as relatively informal, but adopted more formal structures over time (Robnett, 2002). These organizations were a backbone to the Civil Rights movement, enabling some of the deep relational work and community building necessary to sustain momentum and overcome otherwise insurmountable challenges.

Organizational structures like decision making processes, power dynamics, trainings and socialization of members, and relationships among members play an important role in shaping constituent-based action, or activities in which people take part in social change efforts on behalf of their own communities. Though constituent-based action may also occur outside of social movements (for example, in a Parent-Teacher Association), it is a key driver of movement activity. Informal structures, by enabling distributed decision making and deep participation by members, can be especially useful in constituent-based organizing contexts. However, some amount of formalization allows for necessary efficiency when engaging in collective action. It is difficult to maintain informal structures over time and at increasingly large scale, and competitive pressures result in trends toward formalization (Ahrens, 1980; Reinelt, 1994; Staggenborg, 1988). However, formalization can result in prioritizing organizational survival over, and sometimes at the expense of, other goals including movement-level goals. Formalization of certain forms of organization—specifically, professional, bureaucratic forms—may undermine participation by marginalized groups (Ferguson, 1984) and privilege certain organizing logics at the expense of others.

Thus, while some degree of formalization may be necessary, unavoidable, and even desirable, too much formalization can stand in the way of effective constituent-based

organizing. This is what I call the *Goldilocks problem* of organizational structure, connoting the need to engage with the competing pulls of both formal and informal logics. In other words, formal-informal represents a central structural tension for organizers.

Decisions about how to prioritize repertoires of action (the transactional-transformational tension) influence the (re)production of organizational structures. Key examples illustrate the ways that formal and informal organizational structures shape the types of repertoires in which participants engage. In the Civil Rights movement, for example, the formalization of structure contributed to a moderation of tactics by organizations like the Student Nonviolent Coordinating Committee (SNCC; Robnett, 2002). In the nuclear disarmament movement, formal organizations like SANE-Freeze typically focused on institutionally accepted efforts like lobbying, whereas informal affinity groups were more likely to participate in disruption and civil disobedience. And in the labor movement—one of the starkest examples—the emergence and institutionalization of formal labor unions contributed to the steep decline in militant labor action (McCammon, 1990; Wallace et al., 1988). Since formal and informal structures may facilitate different types of repertoires (transactional or transformational), the structural tension intersects with the transactional-transformational tension.

Though scholars widely recognize the trend toward formalization and its impacts on the types of activities in which activists engage (Jenkins & Eckert, 1986; Snow & Soule, 2010; Staggenborg, 1988), research has yet to map how the formalization process occurs through the specific communicative processes at play in the work constituent organizers do on the ground and the mechanisms by which structures influence repertoires for action. Additional research is needed to explore how formal and informal logics may be balanced or

integrated in ways that enable social actors to work effectively together over time—and especially to understand how civic leaders may be developed in our increasingly networked world. For example, how does the presence of a central bureaucratic structure operating in tandem with a more informal, distributed network of members influence those members' understanding of their roles, and with what outcomes for those members and their work toward shared goals? Developing nuanced, thorough understandings of these situations seems to call, in particular, for case studies of organizations employing multiple logics and structures.

One promising area in which to explore the balancing of multiple logics is the context of *hybrid organizations*. Hybrid organizations can combine multiple organizational logics to (re)produce structural forms capable of addressing complex problems; for example, drawing on both business and nonprofit service logics to tackle climate change (Jay, 2013). By drawing on multiple structural frameworks, hybrid organizations can, in theory, take advantage of the benefits of those various forms. Hybridity has been explored by critical management scholars (e.g. Ashcraft, 1999, 2001) and researchers of political participation (e.g. Chadwick, 2005, 2007) alike, optimistic about the promise of hybrid organizations to invite new and innovative forms of participation (Bimber et al., 2012). As hybrid forms are inherently paradoxical, they represent an opportunity to engage with other paradoxes that emerge from the interplay of underlying tensions (Jay, 2013), such as the formal-informal tension. However, the paradoxes inherent to hybrid organizing also pose a challenge: organizational members must navigate those paradoxes through sensemaking and reflexivity in order to produce intended outcomes (Jay, 2013).

The social changes influencing civic engagement in the digital age also give rise to new forms of hybrid structures. Digital technology enables large-scale distributed organizing by people who are not co-located. By enabling teams of people to work together in distributed contexts, digital technology contrasts with the bureaucratic thrust of professionalization. Professionalization is a particular type of formalization that draws heavily on rationality, market-based logics, and bureaucratic power (McAllum, 2012), whereas networks don't typically follow clear hierarchies or market logics. Implications for volunteer involvement mean professionalization may have significant consequences for constituent-based organizations that rely on volunteers to lead their local groups. By combining professionalized structures with grassroots networks, or digitally-based action with face-to-face practices, organizations can (re)produce new types of hybrid structures.

Driven by digital technology in particular, in recent years there have emerged a number of large, professional, hybrid constituent-based organizations that harness the power of the "grassroots" (a colloquial term for constituents) to take part in the political process. These hybrid organizations combine multiple structural forms, such as bureaucracy and distributed networks and online and offline strategies. The earliest of these may have been MoveOn (Karpf, 2012), which arose in the late 1990s as one of the first primarily web-based hybrid organizations; MoveOn began as a response to the Clinton impeachment hearings with the goal of encouraging political leaders to "move on" from the impeachment and tackle other, more pressing issues, but grew into a nationwide, cross-issue mobilizing organization with millions of members. Unlike earlier forms of constituent-based organizations, MoveOn had a low threshold for membership: simply participating in political actions like petitions or rallies constituted membership, though members were also encouraged to donate small sums

of money to support the nonprofit structure (Karpf, 2012). Other, somewhat similar organizations have followed in MoveOn's wake, including mobilization groups that began as electoral campaign structures and then, at the conclusion of the campaign cycle, transitioned into advocacy organizations; prominent examples of these include Organizing for America (OFA, formerly Obama for America) and Our Revolution (an outgrowth of the Bernie Sanders 2016 campaign).

Hybrid structures offer new opportunities for members to engage deeply in civic organizations, and some of them, like MoveOn and Resistance United, go beyond checkbook membership. However, these structures may enable and constrain members' repertoires in interesting and important ways. For example, hybrid constituent-based organizations all take advantage of digital strategies that enable members to easily connect with the organization and take part in low-cost political action like signing petitions and attending rallies; they therefore appear to rely heavily on transactional logics. That said, as discussed at the introduction to this chapter, many other organizing contexts also *appear* to rely heavily on transactional repertoires while also being undergirded by powerful transformational activity. But questions remain about hybrid organizing structures, including: in what ways to hybrid organizations enable and constrain activist repertoires and responses to the transactional-transformational tension? How do hybrid structures contour membership? Do they contribute to cultivating civic leaders, and with what implications for civic engagement?

While hybrid constituent-based organizations themselves do not constitute social movements, they play a role in the movements that are ongoing and even resurging in the U.S.: OFA contributed to the health care movement throughout the 2010s (Dovere, 2017) and Our Revolution has been highly active in both the progressive movement broadly and more

specialized movements like the push to extend public health care to Medicare for All (Borosage, 2020). As hybrid organizations like MoveOn, OFA, and Our Revolution are all heavily network-based, their members—and, indeed, the networks constituting these organizations—are likely to extend to and overlap with broader movement networks, situating them as players in the contemporary movement landscape. The success of these organizations may contribute to the success of the movements in which they participate—and, conversely, their challenges may represent challenges to the social movements they partially constitute. In some ways, it is possible that hybrid organizations may have outcomes similar to those of the institutions that scaffolded earlier movements but are now in decline. Just as one could not study the Civil Rights movement without understanding the role of institutions, we cannot study contemporary networked movements without understanding the formal or semi-formal structures that operate in their midst. Social movements and the organizations that scaffold them are closely linked; to study one, we must also study the other.

The organization at the heart of this study, RU, is situated in the progressive movement at an intersection of other progressive-adjacent movements such as those relating to immigration, climate change, anti-racism, and more. RU combines a large, informal network of grassroots members connected via digital technology with a growing formal, semi-bureaucratic organization, thereby constituting hybridity. Though RU shares some similarities in this way with MoveOn, OFA, and other hybrid constituent-based organizations, RU leaders boast a key distinction: in RU, the network of members constituting the informal, networked component of the hybrid organization formed *prior* to any formal organizational structure; the formal structure only developed later, in order to

serve the needs of those networked activists. This makes RU a rich and fascinating site to explore the formalization process and the impact of formalization on the repertoires with which members engage.

RU's development process also means that a group of grassroots volunteer leaders emerged prior to any formal leadership in RU, but once formal staff leaders did emerge, both volunteers and professional staff together constituted organizational leadership. I have already introduced two relevant and intersecting tensions at play in organizations like RU: the tension between transactional and transformational repertoires and the tension between formal and informal structure. The multiple leadership groups—volunteers and staff—bring a third tension into play: the tension between multiple leaderships. With the professed goal of National staff existing in service to the volunteer leaders, RU brings the added intrigue of illustrating the ways professionalism can play out in a constituent-based organization focused on member empowerment. The structuration process—and, in particular, the processes of formalization and professionalization—may have significant implications for the ways members engage, organize, and lead.

### C. *Preview of the Dissertation*

Having now introduced the topic and provided a rationale, I turn next to the substance of the present study. In the next chapter, I will review existing literature on constituent-based organizations, structure, and membership. I also present research questions that inquire about the ways tensions between transactional and transformational repertoires and volunteer and professional leaderships influence membership and structure in RU, the ways hybridity enables dynamic approaches to managing tensions, and the interactions between members' perceptions of their roles and the ways they (re)produce structure.

In the third chapter, I present a case description of RU and explain my method of inquiry. Seeking a detailed and nuanced understanding of an emergent case, this study takes an ethnographic approach to examining RU's development. I collected data over the course of approximately twenty months from October of 2017 through the spring of 2019. This included 250 hours of field work, which involved participant observation in RU training sessions as well as hundreds of informal conversations (yielding 180 pages of typed, single-spaced field notes); seventeen in-depth interviews (yielding approximately 400 pages of typed, single-spaced transcriptions); and documents pertaining to RU's trainings and other activities, including the online Guide for political action that sparked the formation of early RU groups. I analyzed the data using Tracy's (2013) pragmatic iterative approach supplemented by Fairhurst and Putnam's (2018) integrative approach to identify oppositions. I focused my analysis on critical incidents (Angelides, 2001) in order to examine key moments or instances in which members confronted problems and, through negotiating their responses to those problems, influenced the (re)production of organizational structures.

In the fourth chapter, I present the findings that emerged in response to my research questions. I focus my findings around membership negotiations on negotiations of leadership, following what emerged from my data. I find that leaders constitute their roles in terms of both transactional and transformational logics, but with a strong pull toward transactional logics at the National level due to the trend toward professionalization; this is because professionalization is more conducive to transactional logics than transformational ones. Though RU members (re)produced structures that were increasingly formalized and professionalized, volunteers (and, to a degree, National staff) also engaged in resistance. This

resistance enabled volunteer leaders to remain in tension with professionalized staff rather than becoming dominated by National.

I find that the structures members (re)produced represent a sort of *imbalanced hybridity* in which transactional repertoires subordinate transformational ones and formal structures subordinate informal ones. While hybridity did help members to negotiate the tension between formal and informal leadership at the grassroots level, it also presented constraints and challenges. As volunteers and staff navigated these challenges, the Organizing Team—the body of National leadership responsible for interfacing directly with grassroots leaders—played an important and tension-laden role. At times, OT staff supported grassroots members' resistance activities or even engaged in resistance themselves. However, OT staff also drew on their own previous organizing experiences in ways that (re)produced formalization and professionalization. Finally, I found interesting interplays between perceptions of membership and the (re)production of structure, which membership negotiations influencing reflexive self-structuring and vice versa. I present a model of this process in Figure 1.

Finally, in the fifth chapter, I discuss the theoretical and practical implications of my findings. Theoretical implications relate to the long-term impact of early responses to the transactional-transformational tension; the impact of professionalization on negotiating tensions, including the potential for professionalization to sideline the emotional "heart work" situated at the core of many transformational activities; the role of resistance in maintaining the tension between leadership groups in a hybrid structure; and the interaction between the communicative flows that constitute organization. Practical implications include a discussion of the challenges involved in efforts to (re)produce distinct new organizational

structures that operate differently than their predecessors; the structural flexibility required to accommodate increased member empowerment over time and challenges arising from that increased empowerment; several challenges relating to the particular structure of distributed networks, the impact of system-level critical incidents on structuration processes at the organization level, and the role of members' prior traumatic experiences in activist organizing. Following these implications, I discuss possible limitations to this study as well as several avenues for future research. I conclude with a section on the importance of understanding and exploring hybrid organizing practices in the current moment as we enter a post-pandemic world marked by physical distance, social unrest, and widespread activist efforts.

In short, I will argue that RU's development was marked by key critical incidents that brought novice activists to the threshold of involvement in civic life, and formal organizational structures including the *Guide*, RU's training programs, and political education offered those members the resources and tools they needed to cross the threshold and become community leaders. By enacting leadership roles, novice activists underwent a process of transformation from civic observers to empowered leaders. However, the tendency to (re)produce familiar structures and the strong shift toward professionalization put a ceiling on members' empowerment. As I will demonstrate, resistance by RU members, including volunteer leaders and some professional staff, helped open up new spaces for empowerment; however, system-level issues like nonprofit funding structures present challenges that have yet to be overcome. In the conclusion, I offer further consideration and questions relating to these persistent challenges in the hopes of inspiring further exploration and, perhaps, innovative new approaches to constituent-based organizing.

## II. Literature Review

I turn now to a review of the relevant literature on social change, organizations, membership, and structure, in which I will also present several research questions. I begin by reviewing the role of organizational structure in social change efforts. I draw on the four flows model (McPhee & Zaug, 2000) as a useful framework for understanding the emergence of organizational structures, explaining that while this model has traditionally been used to examine formal, established organizations, it can also be applied to informal or hybrid contexts and thus provides a clear framework to understand the process of formalization over time. I then turn to a discussion of activist repertoires and discuss the ways they relate to organizational structures, breaking down structural types into formal, informal, and hybrid and discussing each. I explore existing research on the benefits of hybrid organizations, then address some challenges that may emerge in hybrid structures. One of the key challenges has to do with the interactions between volunteers and professional staff members; I suggest that these membership groups may exist in tension, and the tension between those groups may influence the (re)production of organizational structures; this is one way that membership and structure may interact. I conclude the chapter with a discussion and research question relating to that interaction.

### A. *Social Change and Organizational Structure*

Often, social change (like the social acceptance of marginalized identities, new legal rights, or enhanced protection of existing rights) is brought about in part by mass participation in social movements. Social movements are contexts in which collective action is used by groups of people to air grievances and make demands for change (Snow et al., 2004), such as the Civil Rights, labor, or environmental movements. They involve

*constituent-based action*, or action taken by groups who are directly impacted by an issue. Constituents are often organized to take action by formal organizations. *Constituent-based organizations* are those specifically focused on engaging constituencies in advancing their own interests. Civic organizations are a type of constituent-based organization characterized by volunteer leadership and distributed decision making by local groups affiliated with a larger umbrella organization, such as the Sierra Club (Andrews et al., 2010). In many social movements, formal organizations, including constituent-based organizations, work together with networks of individuals to accomplish shared goals (della Porta & Diani, 1999); civic organizations also serve to incubate social movements by facilitating collective action and developing new, skilled leaders (Andrews et al., 2010).

Structures such as relationships, norms of interaction, and decision making practices shape member involvement and influence the degree to which mass participation is made possible. Organizational structures shape and are shaped by the interactions among actors (Giddens, 1979). The ability of actors to successfully employ a diversity of tactics rests on their ability to draw on multiple logics. During the Civil Rights movement, for example, actors engaged in tactics ranging from deep relationship building in storytelling circles to mobilizing mass voter registration campaigns and from civil disobedience at lunch counters to legal battles at all levels of the court system; these tactics drew on a variety of logics to produce a rich repertoire that ultimately helped the movement succeed. In turn, the interaction among actors (re)produces, alters, and has the potential to transform structures. In other words, actors exert agency when drawing on and (re)producing or altering structures and are also constrained by existing structures.

Organizational structures include both formal and informal types. *Formal* structures are "normative social system(s)," often designed by managers, while *informal* structures are "emergent patterns of social interactions" (Gulati & Puranam, 2009). Formal structures involve standardized rules or practices that guide behavior that are often developed, codified, and disseminated intentionally, such as through training manuals or organizational documents, and in which members' roles are clearly defined (Coleman, 1990; March & Olsen, 1989; Bandaragoda, 2000). Informal structures like social networks (Rydin & Falleth 2006), in contrast, involve fluid or nonstandard rules that are often learned through word-of-mouth or observation of others. Practices may vary within informal contexts due to the lack of standardization (Freeman, 1971). Because informal contexts like social networks are less bounded, it may be unclear who is a member and who is not; definitions of membership may even vary.

*Formal* and *informal* exist on a continuum, with each pole offering benefits and challenges. Due to the contradictory nature of their characteristics—highly standardized versus nonstandardized, clearly bounded versus fluid, and so on—these poles constitute a tension that members must negotiate. Many organizations involve both types of structures, developing formality from informal contexts or incorporating informal structures into formal ones; the merging of the two types is termed *hybridity*. Members of hybrid organizations negotiate the formal-informal tension by incorporating elements of each structural type. For example, even in a formal, bureaucratic workplace, members may communicate amongst themselves in informal networks; as workplaces increasingly rely on this type of networked communication with members, they often constitute hybridity. Conversely, informal networks such as the Movement for Black Lives may develop some formal structures, such

as a set of established, agreed-upon norms for meeting facilitation, similarly constituting hybridity. The degree to which hybrid structures facilitate participation varies, as does the degree to which participation in turn shapes organizational structures (Bimber et al., 2012).

The process of formalization involves codifying, standardizing, or making explicit organizational practices. Formalization can contribute to streamlining the activity of large groups who need to coordinate together. However, patterns of interaction can be come ingrained and inflexible in ways that constrain the choices made by organizational actors, limiting their opportunities to engage in a diversity of tactics. When options are limited, actors may be less able to reach their goals. It is important to understand the ways that constituent-based organizing structures can enable and constrain actors' use of various repertoires.

Social movement scholars have long asserted that formal constituent-based organizations serve important roles in cultivating participation in movement activity, both during movement formation and over time (McAdam et al., 1988; Staggenborg, 1988). Formal organizations can be especially important in certain social movement contexts, including hostile political environments or periods of diminished activity. This includes movements confronted by direct opposition to counter-movements or otherwise facing especially hostile political climates. Professional organizations—a particular type of formal organization marked by professionalized logics (discussed in greater depth later in this section)—are also especially helpful for sustaining movements with limited constituencies during periods of abeyance, or diminished activity and decreased opportunity for influence (Andrews, 1997; Rupp & Taylor, 1987; Taylor, 1989). For example, Rupp and Taylor (1987)

demonstrate the importance of elite-sustained, professional organizing to steward the women's movement through the post-suffrage period.

However, some types of formal structures may have negative implications for member participation. Scholars in the critical management tradition argue that professional bureaucracy as a structural form maximizes the participation of a few at the expense of the many, posing both ethical and practical problems (Ashcraft, 2001; Fischer & Sirianni, 1984). Bureaucracy privileges rational logics and repertoires, marginalizing non-rational or emotional logics, repertoires, and actors who align with those logics, namely, women and other marginalized groups (Acker, 1990; Ashcraft, 1999). Bureaucratic forms may thus contribute to the disparities in political participation (e.g. Han, 2009).

### ***B. The Four Flows Model of Structuration***

Developing an analysis of the structures constituting hybrid forms like Resistance United requires a theoretical framework that can be used to examine not only formal and informal structures independently, but also the emergence of formal structures from informal ones and the interplay of structures along the continuum. Constitutive approaches to organizations (*communication constitutes organizations*, or CCO) were developed to describe what organizations are and how they emerge. Communication, in this view, has constitutive power (Putnam & Nicotera, 2009). Though constitutive approaches, like much of organizational communication, has primarily focused on formal types of organizations such as corporations (Schoeneborn & Tritten, 2018) or firefighting crews (Jahn, 2016), these approaches can also be applied to other contexts. For example, Koschmann (2012) argues that CCO theories are valuable for understanding nonprofit organizations. Though little

research yet exists in the area, I will argue in this section that CCO theories can be applied to civic organizations and emergent, informal social movement contexts as well.

The interplay between agency and structure is a central focus of structuration theory (Giddens, 1979), one approach to CCO. Accordingly, organizational actors are guided by *rules*, which are principles or norms guiding social interaction, and *resources*, which are material and nonmaterial items guiding activity (e.g., budgets, tools, knowledge, and traditions). Actors rely on rules and resources to help guide behavior, but actors also exert *agency*, meaning the ability to choose between available structures and make a difference in reproducing, gradually reforming, or drastically transforming structures. Agency is constrained (but also enabled by) by available structures, other actors, and complex systems. Structures such as relational patterns are then both the means and outcome of interaction, facilitating and being (re)produced through the practices of organizational members; Giddens (1979) termed this *the duality of structure*. For example, some civil rights organizations employed distributed leadership structures in order to distribute power; in doing so, they facilitated the distribution of knowledge among members, and that knowledge reinforced democratic participation (Robnett, 2002). Participatory structures, here, are both process and outcome.

McPhee and Zaug (2000) argue that structures are (re)produced through a combination of four groups of communicative mechanisms called *flows*. The four flows are (1) membership negotiation, (2) organizational self-structuring, (3) activity coordination, and (4) institutional positioning. *Membership negotiation* refers to how individuals position themselves in an organization and how membership is constituted. The relationship between members and organizations is characterized by dimensions including partial inclusion,

commitment, identification, and leadership (Putnam & Nicotera, 2009). The role of human agency is highlighted in this flow through the actions of organizational members and how they respond to and interact with structures. Membership negotiation is enabled and constrained by structures of which members may have some, but not complete, awareness (Scott & Myers, 2010).

*Organizational self-structuring* has to do with the reflexive control and design of activity patterns, trust relationships, authority and control, and coordination of work sites (McPhee & Zaug, 2000). *Reflexivity* suggests the ability of actors to make sense of, respond to, and adapt the actions they take, and in doing so constitute a complex organizational structure. According to McPhee and Zaug, development of a “complex structure,” or a coordinated locus of control, is what differentiates organizations from other social entities such as lynch mobs or neighborhoods. This flow may overlap with the next flow, activity coordination. However, self-structuring does not concern work itself, but rather deals primarily with how work processes are shaped through internal relations, norms, and social dynamics of an organization.

*Activity coordination* refers to adjusting work processes and solving practical problems (McPhee & Zaug, 2000). This occurs in part as a consequence of reflexive self-structuring. While the self-structuring flow sets out divisions of labor and the relationships that organize work processes, activity coordination involves the adjustments required by organizational members as they undertake the activities geared toward reaching goals. In other words, the organizational self-structuring flow scaffolds the coordination of work activities.

Finally, *institutional positioning* situates an organization relative to other entities in the social order (McPhee & Zaug, 2000). This flow could also be referred to as "identity negotiation," though McPhee and Zaug (2000) chose "positioning" to incorporate both identity and place within the social system. Both identity and place, note the authors, are relative, meaning these processes are inextricably linked. Essentially, this flow deals with how an organization relates to other social entities in its environment.

The four flows model was developed to better understand organizations and has not previously been considered as a tool for examining social movements, though Sillince (2010) has argued for its potential to be used in such a context. Sillince, however, used this argument to claim that this makes the four flows model *insufficiently organizational*. I counter this claim, arguing instead that it is because emergent, informal social movement contexts and organizations are *alike* that the four flows model can be applied to both and used to examine the emergence of organizational structures from informal movement contexts like networks.

Each of the flows is as applicable to informal constituent-based social movement organizing as to constituting formal organization. Participants in social movements negotiate membership and what it means to be involved in that context. Social movement actors reflexively develop relational patterns that shape organizing processes and adjust those processes as they work together to meet their goals. Social movements position themselves relative to existing institutions, including allied organizations or entities and antagonistic organizations and entities.

By clearly delineating the types of communication that constitute organization, this model provides a framework to trace communicative patterns contributing to changing

organizational structures—including how structures emerge and become formalized. Using the four flows model to trace the emergence of formal structures from informal social movement contexts, I can identify the communicative mechanisms giving rise to these structures. These mechanisms can be used to trace changes over time, including the development of dynamic structures such as hybrid organizations. Because the four flows model can be applied to both formal and informal organizing contexts, it can accommodate an analysis of hybrid forms that bring together multiple (formal and informal) logics.

The present project focuses on the membership negotiations and organizational self-structuring flows for their importance to member participation. Membership negotiations in constituent-based organizing involves constituting participation and negotiating the role of constituents in organizational activity. Self-structuring (re)produces conditions that enable and constrain participation, including the depth and breadth of participation opportunities.

### *C. Organizing Repertoires and their Guiding Logics*

Organizational *repertoires* are sets of structures that shape and are shaped by collective activities. Repertoires are defined by Tilly (1978) as "a limited set of routines that are learned, shared and acted out through a relatively deliberate process of choice" (p. 390). Repertoires have the potential to strengthen movement actors' ability to achieve their intended outcomes, or to contribute to movement decline. Often, meeting social movement actors' goals requires a variety of repertoires used in combination. For example, tactics employed in the Civil Rights movement ranged from relatively reformist voter registration and political education to more radical forms such as sit-ins and civil disobedience. Both types were necessary and contributed to creating change.

One way to examine repertoires of practice is by delineating between two broad logics underpinning collective action: transactional *mobilizing* and transformational *organizing*. These complementary logics work together to facilitate movement participation that is both broad and deep (Han, 2014), shaping the way members—including volunteers—participate in movement activity. Like formal and informal structures, these constructs exist on a continuum and describe ends of the spectrum. *Transactional mobilizing* aims to activate the largest number of people possible by reducing the barriers to entry; *transactional organizing* uses more resource-intensive activities to create profound change among participants. As is described below, both types of strategies may be employed in professional contexts, such as the advocacy organizations studied by Han (2014), or informal contexts such as networks of activists.

Groups focused on *mobilizing* seek to influence a given outcome by maximizing participation and minimizing costs (Han, 2014). In the mobilizing paradigm, outcomes are transactional. Activists can offer time, money, and effort to an association in exchange for the chance to take part and be involved, develop new skills, or otherwise benefit from association. However, barriers to entry—the effort required to arrange transportation or the financial cost of donating, for example—can be high, depressing participation. Leaders use a cost-benefit calculation to minimize the cost to activists and maximize participation. The relationship between an association and its members or activists is based on exchange: the organization reduces the barrier to entry to match participants' willingness to exert effort towards the shared goal.

The focus in mobilizing is not necessarily on altering fundamental assumptions of the political system, which requires greater investment of resources, but rather on maximizing

the return on investment to accomplish the immediate task. Deep relational bonds are not necessarily formed, though they may develop among informal, emergent networks of participants. Participating in mobilization practices may be transformative for participants, but if so, the transformation is an unintended (if perhaps welcome) consequence. As a result, mobilizing strategies may be shallower and less enduring. These strategies must be combined with *organizing* practices to cultivate strong commitments and endurance of participation.

*Organizing*, on the other hand, is a transformational process. Rather than focusing just on the outcome of a policy proposal or campaign, organizing creates deep changes among the individuals, organizations and constituencies involved. "Transformational outcomes include the increasing ability of people to see beyond their own self-interest, shifts in beliefs about their own agency, or changes in public opinion" (Han, 2014). In other words, participants' view of power is reoriented in a way that motivates engagement in the political power struggle at the heart of the social movement. By changing the way people see themselves, their work, their fellow organizers, and their involvement with an association, organizing can build stronger and larger networks of people who are committed to long-term work and who are able to generate political power. Relationship building fosters participation by providing relational benefits like social support and identification, reducing barriers to participation and increasing rewards. This also increases the barriers to exit by linking relational benefits to participation. The most effective strategies used to cultivate grassroots involvement and leadership require a combination of mobilizing and organizing.

Both transactional and transformational strategies are necessary to create change in complex social systems, and organizations with the most highly-engaged members operate using a combination of these strategies (Han, 2014). Transformational outcomes facilitate

transactional work on an increasing scale as more deeply invested participants build networks of relationships over time. As the core group grows, mobilization potential increases. But because these complementary logics pull organizational activity in different directions—either using resources to encourage broad but potentially shallow participation, such as attendance at a protest, or using the same amount of resources to achieve deeper transformation in just a few individuals—they can be understood as existing in tension.

In constituent-based organizations, *mobilizing* and *organizing* are sometimes used interchangeably in common parlance. Furthermore, *organizing* is a far broader term in the organizational communication literature than in this particular context, and in that body of work *organizing practices* can be used as an umbrella term for an array of activities encompassing both mobilization and organization logics. For these reasons, I will refer to *mobilizing* and *organizing* practices using the more specific terms *transactional strategies* and *transformational strategies*, respectively. This also helps bring terminology in line with the organizational communication and management literature on *transactional* and *transformational leadership*. The transactional-transformational leadership paradigm developed by Bass (1985) proposes that *transactional leadership* involves reinforcing positive performances by followers, while *transformational leadership* involves "enlarging and elevating followers' motivation, understanding, maturity, and sense of self-worth" (Bass, 1997, p. 130) to move followers beyond their individual self-interests to take more meaningful action that benefits the group, organization, or society. Since these terms map on relatively well across the different literatures, I will use them in place of *mobilizing* and *organizing*.

Transactional and transformational logics may underpin communicative practices associated with each of the four flows, influencing the way actors (re)produce structure in each of the flows. For example, in membership negotiations, *membership* may be constructed in ways that are either more transactional (such as checkbook members) or more transformational (such as cultivating deep relationships), and organizers may experience a competing push-pull from both of these needs. The depth of relationships that develop among actors relates to the emergence of norms in reflexive self-structuring.

Organizations operate on limited resources, including limited time, money, and people power; members must decide how to allocate those resources, and resource allocation in turn shapes organizational structure. In constituent-based organizing, many of the purposes toward which resources can be allocated fall into either transactional or transformational repertoires. For example, an organization may focus heavily on recruiting new members, but efforts at recruitment may be geared largely toward low-stakes mass participation activities like signing up as checkbook members or participating in rallies and protests; this would constitute a transactional repertoire. In contrast, an organization may instead focus on cultivating deeper relationships with a few members, such as devoting resources to training those members as leaders; this would constitute a more transformational repertoire. Each of these repertoires draws on and (re)produces different structures, facilitating either shallow or deep membership.

Since constituent-based organizations operate on particularly limited resources due to the nature of their funding (Smith & Lipsky, 2009; Boris et al., 2010), it is virtually impossible to fully fund all the activities and practices that might benefit the organization and its members. Leaders must decide how to prioritize their resource allocation, and the

outcomes of those decisions are influenced by how those leaders prioritize the types of repertoires: some may focus on cost-effective transactional activities to grow the membership base, while others may privilege transformational activities that, while more costly, can result in more enduring long-term outcomes. Of course, organizations may also devote activities to a combination of repertoires as they seek to take advantage of both broad-based mobilization strategies and deeper, more sustainable practices; however, they must still make decisions about how to prioritize each based on limited resources, and any decision will represent some sort of opportunity cost. Decisions are thus made by weighing the relative benefits of transactional and transformational types of work, and the outcomes of those decisions (re)produce structures influencing future decisions. The tension between transactional and transformational repertoires thus influences organizational membership and structure by shaping the types of structures that are (re)produced and the enabling and constraining effects of those structures on member participation. I ask:

> RQ1A: How does the push-pull tension of transactional and transformational logics influence membership negotiations?
>
> RQ1B: How does the push-pull tension of transactional and transformational logics influence organizational self-structuring?

Employing a variety of complementary repertoires enables actors to accomplish social change. However, actors are also constrained by the repertoires they are able to learn and practice. As Tilly (1995) writes, actors "learn only a rather small number of alternative ways to act collectively.… The existing repertoire constrains collective action; far from the image we sometimes hold of mindless crowds, people tend to act within known influence limits, to innovate at the margins of existing forms, and to miss many opportunities available

to them in principle" (p. 26). In other words, as members engage in social movement activity, their behavior is patterned by repertoires and those repertoires or structures are reproduced. In addition to actors' own familiarity and comfort with certain repertoires, there may be external pressures to adopt and (re)produce certain patterns of interaction (Tilly, 1995). Different types of organizations face different pressures. I turn now to a discussion of types of constituent-based organizations.

### *D. Types of Constituent-Based Organizations*

As discussed above, organizations may draw on and (re)produce both formal and informal structures. These two types of structures fall on a continuum and the poles are situated in tension. Each pole offers various benefits and challenges, and privileging one pole over the other influences the ways members are able to participate and interact with one another. As they (re)produce organizational structures, leaders must therefore consider the implications of structures for member involvement. This is especially important for constituent-based organizations, as member involvement is key to fulfilling their goals and missions. In this section, I discuss potential benefits of both formal and informal structures, the pressures that tend to drive constituent-based organizations toward formal, professionalized types, and implications for organizations and their members. Following this discussion of formal and informal types, I will shift focus to organizations that deliberately incorporate elements of both types, constituting hybridity.

#### 1. Informal and Nontraditional Structures.

Critical management scholars argue for emancipatory structures that enable empowerment, egalitarianism, and distributed control among members (Cheney, 1995; Deetz, 1992). Some scholars (e.g. Rothschild-Whitt, 1979) argue that liberatory structures are

inherently valuable for their role in facilitating empowerment. There are also practical implications for constituent-based organizing. Deeper, more widespread member control and engagement facilitates more powerful constituent-based action. Constituent-based organizations, then, may benefit from employing counterbureaucratic forms drawing on informal structures. Member empowerment through personal development and egalitarian group relations are key characteristics of feminist organizations (Reinelt, 1994), a type of organization that embraces counterbureaucratic structures as a strategy to counter the patriarchal power dynamics they see as embedded in bureaucracy (e.g. Buzzanell et al., 1997). Advocates of this type of structure argue that counterbureaucratic structures like flatter power structures and distributed decision making directly benefit organizational members by increasing their degree of empowerment.

Some constituent-based organizations understand accountability to communities and constituencies as being directly related to organizational structure and member empowerment. Organizations may build upon participatory principles to re-envision governance, (re)producing structures in which participatory decision-making fosters *system-wide governance.* System-wide governance is a model used by progressive, movement-based organizations in which all actors in an organization, including constituents, staff, and board, all participate in governance responsibility (Freiwirth & Letona, 2006). Shared responsibility can encompass organizational and strategic decisions, including strategic directions, organizational visions, political positions, and policy decisions. Some issues may be decided by sub-groups or individual bodies of the organization, or discussed first among sub-groups and then among the membership as a whole; for yet other decisions, additional stakeholders in the broader community are included in discussions. As Freiwirth and Letona (2006)

explain, the system-wide governance model "assumes that the people the organization serves possess the 'lived' experience and passion to best move the organization forward. This is in contrast to the prevailing trend of professionalizing nonprofit boards despite the lack of research demonstrating that professional or wealthy board members improve board performance" (p. 26). In this line of thinking, constituent leadership benefits an organization by closely connecting organizational activities to the needs and experiences of constituent members.

One organization that restructured itself to follow a system-wide governance model is Centro Presente, a Latinx rights organization in Massachusetts whose goal is to empower the Latinx immigrant community. Founded in 1981, Centro Presente was governed until the early 2000s by a hierarchical board of directors, but that situation became untenable in 2001 when the board members were unwilling to respond to urgent changes to immigration policy impacting its constituents (Freiwirth & Letona, 2006). Centro Presente reimagined its governance structure and introduced a system-wide governance model based on a flexible team structure including members, board, and staff. Fundraising was similarly reimagined and integrated into other work such that fundraising events were led by members and used to bolster campaigns by mobilizing the constituency. The case study of Centro Presente suggests that there is potential for organizations to use non-traditional, less professionalized structures that enable deep and widespread member participation. Still, nonprofit organizations overwhelmingly adopt more formal, professionalized structures as opposed to participatory structures like system-wide governance (Friewirth & Letona, 2006).

2. Formalized and Professionalized Structures.

Constituent-based organizations can face pressure to formalize in part due to competition for limited resources including financial donations, volunteer time, and prestige. These similarly plague counterbureaucratic feminist organizations that attempt to eschew bureaucratic structures due to the fact that they see bureaucracy as embodying patriarchal values. Even in avowedly feminist organizations, the needs for efficiency, growth, and competition for resources contribute to (re)production of structures that are increasingly hierarchical—the very types of structures that feminist organizers seek to circumvent (Ahrens, 1980; Reinelt, 1994). This trend is driven by real, material needs: without resources, an organization's survival is challenged. Chances for organizational survival are maximized by following accepted, institutionalized paths oriented around moderate goals and "targeted at non-political arenas" (Minkoff, 1993, p. 903). These strategies allow organizations to garner donations from larger, mainstream grant-making organizations and attract volunteer labor from a wider swath of the mainstream population. In short, to survive in a competitive capitalist context, organizations must accrue resources—and in this pursuit, they tend to (re)produce formal hierarchies.

The trend toward formalization and moderation was demonstrated in Civil Rights organizations that altered their more informal logics and radical goals to fit the desires of mainstream philanthropic organizations (Jenkins & Eckert, 1986). One example is the Student Nonviolent Coordinating Committee (SNCC). SNCC, a Civil Rights organization active in the 1960s, was, at its inception, rooted in decentralized, anti-hierarchical organizational structures that distributed power among movement actors and facilitated deep participation. This included leadership norms, like rotating chairpeople and committees, to foster collective decision making and distributed power. This served to distribute knowledge

and cultural capital among members, fostering transformational outcomes such as deep democratic involvement and participation (Robnett, 2002).

However, as SNCC grew significantly in membership into the mid-1960s, the inefficiencies of egalitarianism and consensus-based decisionmaking created barriers to scale up the distributed leadership structures. This created pressure for SNCC workers to shift to more hierarchical structures, and the organization restructured to be more hierarchical and formal (Polletta, 2006). Thus, the pressures to survive in a competitive organizational field result in (re)production of structures (through reflexive self-structuring) that are increasingly bureaucratic (Snow & Soule, 2010). This type of formalization is called *professionalization*.

Professionalization is one way in which organizations may formalize. While *formalization* refers to clearly defined patterns of activity, *professionalization* refers to patterns specifically associated with the professional world, specifically the formalization of structures based on “corporate principles such as performance-based measurement, competition, and efficiency to coordinate and control organizational practices” (McAllum, 2018, p. 537). Professionalized practices shape occupational norms, work practices, and relationships among members of an organization (Ganesh & McAllum 2012). McAllum (2012) highlights three streams of professionalism: rationalization, marketization, and bureaucratization. *Rationalization* involves weighing the appropriate, rational means to achieve practical social ends, and making obsolete any processes that do not contribute to efficiently accomplishing goals. *Bureaucratization* refers to “the process of standardizing, formalizing, and institutionalizing systems, rules, and documentation requirements to ensure due process and fair outcomes” (McAllum, 2012, p. 538). *Marketization* is the monetization of social behavior such as cost-benefit analyses that inform evaluations of activities,

behaviors, and events. Reliance on one or more of these streams contributes to professionalization in an organization.

Each of these three streams of professionalization impacts professional social movement and advocacy organizations. These organizations differ from previous forms of constituent-based social movement organizations in a variety of ways, including their repertoires of practice and member involvement (McCarthy & Zald, 1973, 1977). Professional social movement and advocacy organizations are characterized by leaders who are recruited from outside of a constituency, full-time paid staff, membership defined by donations ("checkbook members") rather than more substantive forms of participation, and strategies that involve advocacy on behalf of groups rather than mobilizing constituencies directly.

The problems of professional bureaucracy play out in constituent-based organizations as professional leaders draw on rational logics to (re)produce formal, professionalized structures. Professional leaders prioritize preserving the organization over other goals, and tend to prefer engaging in mainstream, professional activities such as lobbying and legislative work over more radical or disruptive activities (Staggenborg, 1988). These preferences stem in part from a desire to work "regular," professional hours, as well as from a skill-based bias. Professional staff possess skills more suited to professional work rather than disruptive, counter-institutional organizing. More centralized structures are more efficient and less ambiguous, and easier to manage than the nonbureaucratic or anti-hierarchical structures that enable decentralized, participative decision making (Polletta, 2006; Rothschild-Whitt, 1979). Professional staff, functioning in leadership capacities and facing the competitive pressures of the organization's environment, reproduce the structures

with which they are most familiar: formal ones. They also tend to (re)produce professionalization by attracting other professionals to the organization (DiMaggio & Anheier, 1990). Thus, professionalization becomes a self-perpetuating cycle: as organizations develop formal structures involving professional staff, professional staff reproduce structures that are increasingly formalized.

The trend toward more formal, professionalized organizational forms poses a problem when these professionalized structures are inimical to the repertoires necessary to create change. For example, the tendency of organizations to shift focus away from disruptive protest and toward organization building has serious implications for movements whose goals rely on system-level disruption. Piven and Cloward (1977) argue that in the case of poor people's movements, disruptive protest is the only viable tactical recourse enabling movement actors to achieve their ultimate goals of social change. A shift away from disruptive protest spells disaster for the people whose lives would be meaningfully impacted by system-level transformation. Similarly, securing funding streams from mainstream grant-making organizations often requires organizations to quantify their work, using market-based cost/benefit analyses to demonstrate "success." The quantification of "success" can have the implication of shifting the organization's mission away from their constituencies (Lewis, 2005).

Furthermore, organizations that are classified as nonprofits under the tax code must also focus on compliance with regulatory agencies. As Weisbrod (2004) demonstrated, the focus on compliance can paradoxically result in organizations focusing heavily on providing services to groups that are more readily accessible and easy to serve, rather than exerting efforts to deliver services to those in the greatest need. For example, the YMCA, an example

of an increasingly commercialized nonprofit organization, has been criticized for focusing its expansion efforts in affluent areas rather than in under-served areas that would enjoy greater benefits from access to affordable community centers (Weisbrod, 2004).

It is not the case that certain repertoires are inherently *good* or *bad*, but rather than some repertoires are more effective for maintaining accountability to a constituency and accomplishing relevant ends, and effective action may require a combination of logics, especially when considering long-term sustainability not only of structures but of movement toward goals. Ultimately, constituent-based organizations are most accountable to their constituencies when constituencies are directly and substantively participating. But as organizations become increasingly focused on their own survival, accountability shifts from constituencies to players that contribute most directly to survival, like funders and professional staff recruited from outside the constituency. This can result in a shifting of repertoires, which may be (though is not necessarily) inimical to constituents' interests. In those cases, the shift is a problem on both ethical and practical levels. First, it may be ethically questionable to ask constituents to continue supporting an organization that is not acting in their best interests. Second, it may be difficult for an organization to maintain high levels of support from a constituency if it is not acting in their best interests. For organizations that rely on high levels of support from members, this poses a practical problem.

To summarize, formalization has the potential to function as a vicious cycle if not held in tension with informality. Social movement organizers have struggled with this Goldilocks problem for generations. As a result of the Goldilocks problem, organizations in the social movement sector may feel as though they are caught in a double-bind: survive and

shift toward mainstream, professionalized models that are less accountable to their constituencies, or maintain informal structures that facilitate deeper constituent involvement and risk being marginalized or going into remission. This organizational dilemma reverberates up to the movement level, where organizers struggle with the tension of requiring formal organizational structure to survive in the competitive capitalist context, and risking formalization to the degree that member involvement is depleted and accountability to constituencies is diminished. The dilemma also influences the repertoires with which activists can engage: relying heavy on formal, professionalized structures may privilege transactional repertoires over transformational ones. Conversely, drawing heavily on one set of repertoires or the other could influence the types of structures that are (re)produced to facilitate those activities. While progress toward movement goals *can* be made by organizations that favor either formal or informal structures, research suggests that both-and approaches in the form of *organizational hybridity* represent a promising area to explore.

> RQ2A: How does the transactional-transformational tension relate to the (re)production of formal structures?
>
> RQ2B: How does the transactional-transformational tension relate to the (re)production of informal structures?

### *E. Organizational Hybridity as a Response to the Goldilocks Problem*

To recap, the Goldilocks problem of constituent-based social movement organizing pervades social movements and the organizations that help drive them. On the one hand, social movement actors can benefit from organizational structures that streamline activity and enable better coordination on a large scale. On the other hand, some types of formal structures can be inimical to actors' goals. For example, highly formalized, professional

structures can lead to a focus on certain types of tactics over others, which is a problem since activist groups are strengthened by the use of multiple repertoires. While neither transactional and transformational strategies are confined to the realm of either formal or informal contexts—both can be used across contexts—more dynamic organizational structures may foster greater capacity to deal with large, complex problems (Jay, 2013). That is to say, organizations incorporating both formal and informal structures may be able to deftly negotiate the tension between transactional and transformational repertoires, incorporating both in the ways that are necessary for accomplishing change. More dynamic structures may thus be better equipped to facilitate organizing activity toward large-scale social goals.

Scholars interested in the ways that organizations attend to multiple, competing demands simultaneously have turned their attention toward paradox. Paradox is defined by Smith and Lewis (2011) as "contradictory yet interrelated elements that exist simultaneously and persist over time" (p. 382). From a perspective of paradox, long-term organizational sustainability requires constant negotiation of underlying push-pull tensions in order to meet contradictory needs (Lewis, 2000).

Adding to the complexity of negotiating oppositions, recent scholarship has explored the ways in which tensions and paradoxes may become intertwined. For example, Jarzablowski and colleagues (2013) found that paradoxes may coevolve recursively, building on and intertwining with one another. This has led paradox scholars such as Schad and colleagues (2016) to call for greater focus on paradoxical complexity. To better understand the complex interrelationships among paradoxes and tensions in organizations, Sheep and colleagues (2017) adopt the term *paradoxical knots*, drawing on the literature on relational

dialectics (Baxter, 2001; Baxter & Montgomery, 1996). Paradoxical knots are defined as ongoing, multiple tensions that become intertwined with each other and impact each other as a compound force (Fairhurst & Putnam, 2019).

By studying paradoxical knots, researchers can better understand how members recognize, perceive, and construct discourses around multiple tensions—and the impact that those interrelationships can have. Knots can have either *prismatic* effects, which amplify other tensions or generate new ones, or *anti-prismatic* effects, which mitigate tensions and can result in harmonious effects (Sheep et al, 2017). The ways in which members discursively construct and address tensions can influence the impact of the knot. Members establish rationales for dealing with tensions based on perceptions that tensions are either a threat to be resolved or a solution to help address complex problems. Framing tensions in these ways can "serve as a basis for counter-intuitive logics that transform typically positive concerns into negative ones (due to seeing tensions as threats) or negative concerns into positive ones (due to seeing tensions as ongoing opportunities for creative solutions)" (Sheep et al, 2017, p. 475).

In addition to paradoxical knots, the complexity of contradictory elements can be illustrated using the concept of nested tensions. Nests are ways that multiple tensions and responses to them cross organizational levels and boundaries (Panayiotou, Putnam, & Kassinis, 2019). Depending upon where paradoxical tensions originate (e.g., individuals, teams, divisions, industries, and/or institutional levels), they may result in rippling effects at other levels. Similarly, nested tensions also operate with respect to boundaries, such that changes on one boundary may reverberate elsewhere. Knotted and nested oppositions make dealing with paradox and tensions all the more complex for organizational members.

Hybrid organizations offer an avenue to explore the ways actors can engage with paradox (Jay, 2013). By drawing on multiple organizing logics and combine them in innovative ways, hybrid forms may facilitate a wide array of organizational practices. Ashcraft (2001) argues that the hybrid term *organized dissonance* enables actors to accomplish paradoxical goals by "embracing the strategic, ironic union of antagonistic elements" (p. 1301). Rather than attempt to synthesize a harmonious union, organized dissonance "use friction between partnered forms to offset their respective pitfalls" (p. 1316), reframing tensions as generative.

In the context of constituent-based action, hybrid organizations afford a variety of new modes of member involvement (Chadwick, 2005, 2007; Bimber et al., 2012). For example, the Howard Dean presidential campaign in 2004 combined traditional, formal political campaign structures with emergent networks of supporters facilitated by digital media, enabling supporters of the campaign to engage in lively online debate (Chadwick, 2007). Another important example is MoveOn, a hybrid advocacy organization driven primarily by mass-based, digitally-enabled activism. Through a massive email list and fundraising structure, MoveOn's tiny staff (with no physical office space) is able to mobilize large crowds relatively quickly (Karpf, 2012). For example, during the 2008 election, MoveOn mobilized nearly one million volunteers and raised $88 million for Barack Obama. The organization employs "online-to-offline" strategies, connecting online supporters to local MoveOn groups that meet in person to plan and organize actions like protests.

The Goldilocks problem of constituent-based action can be framed as an opposition between multiple competing needs existing in tension: the need to formalize (some degree of, some) structures, and the competing need for maintaining informal structures to facilitate

widespread, informal participation by large groups of networked participants. I use the term *Goldilocks solution* to connote solutions that are neither overly formal nor overly informal, but meld multiple logics together. The both-and approaches of hybrid organizations are a promising area to explore organizational responses to the Goldilocks problem. I ask:

> RQ2C: How does the transactional-transformational tension relate to the (re)production of hybrid structures?

### F. Volunteers, Leadership, and Tensions in Hybrid Organizations

Emerging structures are shaped significantly by leaders within an organization as those leaders negotiate salient tensions. Leaders play key roles in structuration processes as they draw on, reproduce, and renegotiate extant structures (Fairhurst & Connaughton, 2014). In hybrid organizations, power struggles play out among internal and external constituencies vying for different organizational logics to be privileged (Jay, 2013). These struggles involve shifts in the balance of power, which create instability and change in the organization as actors manage various tensions. If one logic becomes dominant, innovation and the capacity for recombination of logics can be stunted; however, if negotiated well, tensions may also be generative. Organizational outcomes are determined significantly by leaders' responses to tensions (Quinn, 1988). Leaders play a role in moderating conflict and preventing domination of one competing logic over another (Battilana & Dorado, 2010) in order to maintain innovative potential and more successfully accomplish the organizational mission. In short, leaders play a pivotal role in how tensions are negotiated and with what impact on the organization, its goals, and its members.

Even as leaders may seek to negotiate tensions in a way that ultimately balances or brings the poles into interplay, existing structures influence the ways leaders approach

tensions and may constrain their abilities to do so. For example, in negotiating tensions, leaders must negotiate isomorphic pressures that encourage shifts toward the status quo (DiMaggio & Powell, 1983) which, in constituent-based organizations, is increasingly professionalized (McCarthy & Zald, 1973; Staggenborg, 1988). As discussed in the section on professionalization, professional leaders tend to (re)produce formal structures by attracting other professionals, basing decisions on past experiences in formal organizations, and responding to external influences like appealing to funders and adhering to regulatory requirements. Existing structures, in this way, may influence professionalized leaders to (re)produce formalized structures at the expense of informal ones.

In hybrid organizations, however, not all leaders are professionals; in fact, the presence of multiple leaderships—professional and volunteer—poses an interesting problem for hybrid constituent-based groups. That is, a tension emerges relating to leadership itself: the tension between volunteer and professional leaderships. This tension may be especially pronounced in hybrid constituent-based organizations, such as MoveOn, where volunteer leaders enjoy a significant degree of autonomy, meaning their leadership may have a substantive impact on organizational structuring. Volunteer leaders may have different motivations for involvement and engage differently with the pressures that shape organizational repertoires. The different motivations and activity patterns of professional and volunteer leaders are likely to result in a tension between these multiple leaderships.

1. Participatory Structures and Volunteer Members.

Volunteer members are common in many types of nonprofit organizations including health care, religious organizations, and political and civic organizations. However, volunteering across these different types of organizations may not look the same. Some of

those organizations, such as health care or religious organizations, may be quite formal and bureaucratic; volunteerism in those structures is characterized differently than in constituent-based or civic organizations that rely on volunteers for more substantive labor, including leadership of local groups. In this section, I will discuss important characteristics of volunteer labor and some of the structural characteristics of organizations that shape volunteer involvement, focusing in particular on constituent-based and civic organizations.

Volunteer membership is characterized differently than membership in for-profit contexts in which employees are linked to employers through financial incentives, which means that sustaining volunteer membership can be tricky. Rather, volunteer membership is characterized by a mutually beneficial relationship between volunteers and their organizations, with volunteers providing important labor for organizations and in turn gaining a sense of fulfillment and involvement. However, the relationship can be tenuous, because volunteers serve "out of the goodness of their heart" rather than in exchange for financial compensation (Adams et al., 1988). As a result, volunteers have little incentive to stay at the organization or maintain a rigorous work ethic should they become dissatisfied. Organizations, however, have a vested interest in keeping volunteers on board because—in addition to providing important sources of labor—long-term volunteers were more likely to become donors (Garner & Garner, 2011). Maintaining volunteers' satisfaction and involvement hinges on the success of member engagement, or "the degree to which the organization generates participation by members in voluntary group activities" (Andrews et al., 2010, p. 1196). Engaged members also expand organizational capacity through the development of skills, relational ties, and repertoires of practice.

Participatory structures may be especially important for organizations whose work hinges on the involvement of volunteer members. For example, the success of civic associations rests on volunteer leadership and decentralized decision making by local groups or units or volunteers—in fact, volunteer members and self-governance are "defining organizational characteristics" of civic organizations (Andrews et al., 2010, p. 1194). Maintaining the volunteer base and cultivating those volunteers as leaders are core needs of civic organizations, and their structures are thus more focused on participatory activities and decision making.

Organizations can also engage and retain volunteer members by considering decision making and voice. Decision making and voice both play a significant role in participatory structures such as those of civic organizations, and both shape volunteers' experiences. When volunteer work involves collaboration with paid staff members, interactions and relationships between staff and volunteers can influence the ways volunteers participate in decision making and have their voices heard, which in turn influences retention. Communication between paid staff and volunteers can shape volunteers' choices between speaking up and providing the organization an opportunity to fix a problem, leaving the organization, or remaining at the organization but participating less substantively or less effectively (Garner & Garner, 2011). To increase satisfaction and retention, Garner and Garner (2011) recommend putting volunteers "in positions to make relationships with other people, including working in groups, being engaged in advisory committees/boards, and participating in planning committees" (p. 825). Volunteer organizations should also consider other ways volunteers can contribute substantive feedback. Since voicing opinions has been found to relate to perceptions that management is open to new or different ideas (Pinder & Harlos,

2001; Milliken et al., 2003), Garner and Garner recommend that "paid staff… honestly ask themselves how open they are to volunteers' ideas" (p. 825).

In addition to retaining volunteers and providing opportunities for decision making and voice, civic organizations must also cultivate many of those volunteers as leaders. Volunteer leaders, operating in a decentralized structure, are responsible both for maintaining the organization and advancing the mission (Wilson, 1973). Such distributed structures contrast starkly to *command and control* models in which leadership is concentrated at the top of a hierarchy (Andrews et al., 2010). By developing leaders—meaning, developing the skills of those volunteer leaders—organizations can maintain or increase capacity in the long term. Those who develop leadership skills through training or other activities within civic organizations may also become leaders in the wider social movement field.

2. Professionalism and Volunteers.

Interactions between volunteers and staff are complicated by a tension between volunteerism and professionalism. Professionalism and volunteerism provide different benefits to volunteers. For some, however, professionalism and volunteerism represent incompatible paradigms. Volunteers who do not appreciate professionalism may engage in resistance.

Professionalism may afford some benefits to volunteers, or at least to some volunteers. McCallum's (2018) study found that professionalism enabled volunteers to take a calm, level-headed approach to their work and to suspend value judgments when dealing with issues such as domestic violence or criminal activity. Outside of those stressful situations, volunteers drew on the caring, relational work associated with volunteerism. Another benefit of volunteerism may be increased autonomy and creativity enabled by the

lower degree of organizational control experienced by volunteers relative to professional staff. Deetz (1992) argued that when members conform to professional norms, they take "greater care to not make a mistake than to make a creative decision" (p. 226), which can stifle creativity and autonomy. Skocpol (2003) agreed, linking professionalism to a higher degree of control and diminished autonomy.

The seeming incompatibility between volunteerism and professionalism can result in conflict between members associated with each paradigm of involvement. Ganesh and McAllum (2012), for example, argue that "the very practices that constitute volunteering can be understood as forms of unpaid, amateur, and low-status labor" (p. 153) in tension with paid, expert labor by higher-status employees. Sometimes, professional staff criticize volunteers by calling their professionalism into question, disparaging their knowledge and skills and making volunteers feel devalued and inferior (McCallum, 2018). When paid staff see volunteers as inferior due to their non-professional status, they may ignore volunteers (McCallum, 2018) and make it more challenging for volunteers to express voice. As discussed above, this may decrease volunteers' involvement in the long term.

A consequence of dissatisfaction or disparagement in organizations can be reconstitution of members' identities. Members who experience disidentification with an organization may constitute their roles as *outsiders within* (Stout, 2002). These outsiders within resemble strangers, who see patterns that might be missed by those more familiar with a situation, revealing less-visible or marginalized practices and structures (re)producing the social order (Allen, 1996). Volunteers who feel excluded or disparaged due to the volunteerism-professionalism tension may end up feeling like outsiders within, which in turn could result in unique insights into organizational practices.

Members who experience the volunteerism-professionalism tension negatively may also engage in resistance. Resistance can include symbolic or material forms and overt and covert activities (Mumby, 2001; Putnam et al., 2005). Some of these include ambivalence, resignation, toleration, theft, noncooperation, sabotage, confrontation, collective action, formal complains, legal action, or violence (Tucker, 1993). It can also include resistance to regulations of identity by managers (Collinson, 1992; Mumby, 2001).

Research on volunteers found that some volunteers resisted professionalism by responding with a strategy of segmentation, setting aside a brief period of time at the beginning of meetings to deal with the requirements of professionalism (which they called the "gory bits") before moving on to the "nice bits" associated with volunteerism (McAllum, 2012). Others simply chose which system to operate in, drawing on previous experiences and existing skills to constitute their involvement in terms of either professionalism or volunteerism; most chose volunteerism. For the latter, professionalism and volunteerism were viewed as two separate and incompatible systems that were impossible to reconcile. Resistance may enable volunteers to engage in identity work that runs counter to management discourses that privilege professionalism.

Other volunteers may resist organizational practices by resigning themselves to practices with which they are not satisfied, reducing their level of commitment, and neglecting their responsibilities. For example, Garner and Garner (2011) found that volunteers may choose to neglect their duties rather than to exit the organization, especially when dissatisfaction was combined with support from the organization.

In short, the ways members—including both volunteers and professional staff—communicate and negotiate the volunteerism-professionalism tension has implications for

volunteer involvement in an organization. Few studies have yet explored how this tension plays out in civic organizations. Civic organizations differ from other volunteer contexts like health care or religious organizations in that civic organizations rely on volunteers to serve as leaders in their local groups. This situation gives rise to a tension not only between volunteers and professional staff, but also between multiple leadership groups.

3. The Leadership Tension.

In hybrid organizations that combine multiple leadership groups, those leaderships steward the organization together. Like Fairhurst (2008), I adopt Robinson's (2001) definition of leadership: "Leadership is exercised when ideas expressed in talk or action are recognized by others as capable of progressing tasks or problems which are important to them" (p. 93). This discursive approach to leadership is most appropriate for hybrid contexts because it detaches *leadership* from a managerial role; both volunteers and professional staff may take on leadership roles by virtue of their ability to influence others through talk rather than through coercive action. Leadership may be distributed among multiple actors (Gronn, 2002), or even multiple groups of actors.

Indeed, hybrid organizations may face unique challenges—and potentially unique benefits—as a result of distributing leadership among multiple groups of actors including volunteers and professional staff. The members of each leadership group possess different sets of resources including skills, experiences, and knowledge; their roles in the structurational process will look different and have different impacts. Thus, leaders may be faced with negotiating a tension relating to the leadership body itself: the tension between multiple leaderships. This tension is likely to influence the membership negotiation process as members make sense of their leadership roles relative to the other leadership group. It is

also likely to influence the reflexive self-structuring process as leaders exert agency to shape organizational structures; for example, one leadership group may exert greater power than the other in the reflexive self-structuring process. It may also be the case that the leadership groups influence hybridity in different ways; both groups rely on hybridity to function together, and as they interact, they (re)produce hybrid structures. The impact of their reflexive processes has implications for organizational structure.

To explore the impact of this tension between multiple leaderships on organizational membership and structure, I ask:

> RQ3A: How does the tension between multiple leaderships influence hybridity in the membership negotiations flow?
>
> RQ3B: How does the tension between national and local leaderships influence hybridity the reflexive self-structuring flow?

The multiple leaderships involved in hybrid constituent-based organizing presents a unique problem and, potentially, a unique opportunity. Hybridity, as discussed above, may enable organizations to deal with problems and tensions in innovative ways (Jay, 2013). It is possible that hybrid structures facilitate useful strategies for managing tensions that emerge between professional and volunteer leaderships, as well as the tension between transactional and transformational repertoires. For example, hybridity may encourage paradoxical thinking (as suggested by Jay, 2013) that better equips members to deal with other tensions in the organization, like the tension between repertoires or the tension between leaderships. It is also possible, though, that members become stuck in an oppositional framework, perceiving the other leadership group to be in irreconcilable opposition to their own or the two

repertoires to be incompatible; in this case, hybridity may constrain actors by limiting the degree to which they are able to work together or encouraging bifurcation. Therefore, I ask:

> RQ4A: (How) does hybridity enable/constrain both-and approaches to the tension among multiple leaderships?
>
> RQ4B: (How) does hybridity enable/constrain both-and approaches to the transactional-transformational tension?

### G. *Interactions Between Membership and Structure*

Existing literature, as the above discussion illustrates, shows that membership and structure are closely related. Relational, communicative, and power structures shape the way members constitute their involvement in an organization. Relationships can strengthen involvement when members find benefits from them, or diminish involvement when relationships are imbalanced or frustrating. Communication structures—especially patterns of communication between staff and volunteer members—influence the ways volunteers understand their roles and, consequently, their long-term involvement. Power structures, too, shape membership: participatory structures enable members to substantively shape organizational work, but can develop concertive control mechanisms that become overly constraining (Barker, 1993) or mask underlying power dynamics (Freeman, 1971); traditional bureaucratic structures can stunt participation by confining members to rigidly defined roles in a hierarchy. When combined in hybrid form, however, there may be possibilities to engage with these structures in tension, opening up possibilities for participation. As CCO theories foreground, the agency of members in turn shapes structure: agency and structure exist in a dialectical relationship, with active participation by members in turn (re)producing or transforming the structures that shape membership. Members can exert agency to (re)produce

participatory structures or, as sometimes happens, their participation can result in (re)producing structures that are increasingly formalized (Robnett, 2002).

Recent research explores the ways that McPhee and Zaug's (2000) four flows of communication intersect, overlap, and feed into each other. In particular, Layne and colleagues (2019) show how flows converge, mediate, and activate other flows in the constitution of an emerging organization. They found that flows may not simply overlap, but can directionally impact one another. For example, membership negotiations may flow into activity coordination as membership "affects what work can be completed and how members will accomplish projects" (Layne et al., forthcoming, p. 21). Flows may also converge in certain areas as multiple—or even all four—flows combine and influence constitution of an issue such as materiality or time. For example, physical space impacted all four flows.

As Layne and colleagues (forthcoming) point out, there remains a dearth of empirical research applying the four flows model. This model, however, provides a valuable framework to understand the interwoven nature of communicative phenomena impacting the constitution of organization. Most relevant to the present study are the relationships between membership and structure. To explore these relationships in the context of hybrid constituent-based organizing, I ask:

> RQ5A: How does organizational structure influence members' perceptions and constitution of their roles?
>
> RQ5B: How do members' perceptions and constitution of their roles influence the (re)production of organizational structure?

### *H. Summary*

This project explores several tensions at play in hybrid constituent-based civic organizations. First, there is a tension between transactional and transformational repertoires, guiding the type of work done by members and influencing the ability of an organization to both scale up and sustain its work long term. Second, there may be a tension between multiple leaderships. Underlying the leadership tension is a tension between volunteerism and professionalism, which, when leadership is distributed across multiple groups guided by each of these paradigms, results in a tension between those leadership groups. These tensions are likely to influence constitutions of membership and (re)production of structure. Hybridity may afford opportunities for members to negotiate these tensions in ways that are ultimately constructive and beneficial to organizations and their members.

Research questions in the present study inquire about how the tensions discussed here influence membership and structure, how hybridity influences the negotiation of the tensions, and how membership and structure influence one another. Next, I turn to a description of the case—an emergent, hybrid, constituent-based organization—and to the method of inquiry.

# III. Method

This study takes an inductive approach to investigate a set of research questions regarding the emergence of formal, professionalized structures in RU. The primary sources of data for answering all five research questions were field notes, which were taken during participation and included notes from dozens of informal interviews; and transcripts of in-depth, semi-structured interviews conducted over the phone between site visits. Supplementary data derived from organizational documents including the founding *Guide* and training manuals. Data were coded and analyzed using a combination of Tracy's (2013) pragmatic iterative approach and Fairhurst and Putnam's (2018) integrative approach to identifying oppositions.

## A. *Case Description: Resistance United*

Resistance United (RU) began in November of 2016 as a network of people taking action based on The RU Guide, an online guide for applying pressure to elected officials. The Guide was drafted in the aftermath of the presidential election by a group of Congressional staffers, think-tank employees, and other DC insiders. The Guide was explicitly modeled on Tea Party tactics of disrupting "business as usual." After sending the Guide out on Twitter, the authors were (as their narrative goes) contacted by people all over the country who were forming "RU groups" based on the guide, and the authors created a registration form to track the emerging network of groups. The popularity of the Guide was boosted significantly in January 2017 by a popular Rachel Maddow segment and a mention by Michael Moore during his speech at the DC Women's March. Within months, approximately 6,000 RU groups were registered, purportedly at least two in every Congressional district across the U.S. according to multiple participants.

As 2017 pressed on, the Guide's authors formalized RU as a legal entity with at least three classifications including a 501(c)(3) organization, a 501(c)(4), and a Political Action Committee (PAC). They also began formalizing the organizing practices of RU. Staff were hired and office space was rented. The founders and early staff held a "Listening Tour," traveling across the United States talking to local group leaders about their goals and needs. According to statements made by participants about the listening tour, group leaders overwhelmingly expressed desires for resources and structure, and in doing so contributed to the formalization process.

The new team of national staff, or HQ, began plans for a series of Regional Institutes to be held around the country, bringing HQ staff together with local group leaders. The first Regional Institute was constructed in large part by a leadership development team run by Marshall Ganz, a highly respected scholar and practitioner of constituent-based organizing with roots in the United Farm Workers campaign and Civil Rights movement. Ganz's team used that Institute to train RU's professional organizing team in the Ganz model, a set of practices oriented heavily around deep relational work and solidarity building.

Eight Institutes were held between October 2017 and June 2018. During this time, a repertoire of practices was formalized through interactions among members, training materials, National resources provided to groups, and organizational discourses. As the Institutes progressed, the training model diverged from the original primary focus on deep relationship building (rooted in transformational logics) and branched out to more heavily incorporate a variety of strategies designed to maximize mass participation in electoral mobilizations (transactional logics).

The formal organizational structures and emergent network of grassroots group worked together using a combination of repertoires rooted in both transactional and transformational logics. Activities were largely oriented around protesting Trump administration policies, applying pressure to policymakers, and, as the 2018 election cycle progressed, endorsing and supporting candidates in both the primary and general midterm elections.

Now just over three years since its inception in the living room of two soon-to-be-out-of-work Congressional staffers, RU represents a behemoth of contemporary professional and volunteer progressive organizing. HQ now formally employs over 90 full-time national staff doing organizing, political, policy, and financial work, training group leaders, and working directly with Members of Congress to advance a progressive political agenda. The HQ team includes two co-executive directors overseeing departments including organizing, political, policy, communications, and finance. Each of these departments is led by a director overseeing a number of staff. According to participants, staff are relatively specialized and job duties no longer overlap significantly.

At the grassroots level, RU boasts the largest volunteer base of any progressive constituent-based organization in the country (a figure that is difficult to verify, as I was not given access to internal member counts—however, if not *the* largest, it is surely one of the largest). Still, numbers may be declining. Many groups report high attrition rates. This is normal considering the magnitude of early involvement but poses concerns for sustainability. As of June 2018, OT members reported between 2,500-3,500 active groups—a decline from the early height of 6,000 groups. Some of this was due to groups combining with others in their local geographic region; some of it is likely due to attrition.

The Executive Directors were also the spearheading creators of the foundational RU Guide to effective grassroots advocacy. It was this document, first published online in late 2016, that spurred the formation of grassroots groups and, in turn, led the authors to respond to emerging group leaders' requests for further stewardship by formalizing an organizational structure. The Guide had approximately two dozen authors, many of whom remain un-credited. The choice to remain un-credited, according to one of those authors as well as three authors who did eventually put their names on the *Guide*, was based largely on their employment status: these individuals were employed in various departments across the federal government and feared reprisal from the administration against whom the *Guide* encouraged constituents to act. Several of the known authors are now on staff in other departments, including Political and Communications. I am still not privy to a comprehensive list of which staff members were involved in the initial construction of the Guide.

A significant portion of RU's activity is coordinated by local volunteer group leaders and members. The number of groups nationwide has decreased from its height at 6,000 groups due to a variety of factors, including groups dying off and merging with others. As of June 2018, an estimated 2,500 groups were operational. Together, the bureaucratic HQ and network of local groups constitute a hybrid organization.

RU's hybrid structures are (re)produced by members and leaders, who constitute multiple leadership groups. During one training, an organizer used the term "leader-full," a reference credited to the Movement for Black Lives, to connote an organizing context stewarded by countless grassroots leaders rather than formally constructed leadership. In RU, there are both: grassroots group leadership and centralized National leadership. It is more appropriate to say there are different, plural leaderships in RU than any singular leadership.

This study requires differentiating between RU's HQ leadership (discussed above), the local group leadership, and mediating organizing team leadership all play important and sometimes divergent roles.

Leadership of the grassroots groups is hardly singular itself, but I'll use the term grassroots leadership to denote volunteer leadership at the group level while recognizing that different local leaders will perceive and act in different ways. Grassroots group leaders work on a volunteer basis and are often self-selected. Many grassroots leaders were the founders of their local groups. Sometimes, their leadership roles were formalized through an appointment or elections process as the groups formalized. Some groups are led by individuals, others by boards of directors, and others by various other distributed leadership structures. Less important than the formal title (be they President, Steward, Co-Chair, Board Member, etc.) is a grassroots leader's position of influence in their group. I use the term local group leadership or grassroots leadership to identify influential members of local groups who exert effort to shape their group's practices of organizing.

The Organizing Team (OT) are HQ staff whose roles are defined by working in close relationship with the grassroots groups. The organizing team is situated in the liminal space where National and local meet. While technically part of the National organization—they are fully paid staff, attend National meetings, and participate in National decision making to the same extent as other departments—the work done by the Organizing Team is in many ways more like the work done by the grassroots groups.

At the OT's formation, roughly ten organizers were responsible for coordinating with around 600 groups each—a feat that was simply not possible. OT members are assigned geographic regions or turf, but due to the vast number of groups relative to the number of

staff, organizing team members were unable to reach out to every group on their assigned turf. However, the size of the team doubled in its first year and turf was reorganized based on smaller chunks. For example, by the end of 2018 there were three OT members working with groups in California and many of the OT members who had begun by overseeing groups in five or six states had been pared down to only one or two states. Many OT members live in their assigned turf, such as the California and Texas organizers, but others—such as the Eastern Seaboard organizer—live outside of their turf.

The OT is distinct from other branches of National multiple ways. First, the day-to-day work of the OT is more closely connected to that of local group leaders, as discussed above. Additionally, the demographic composition is different. While early National leadership was overwhelmingly comprised of white professionals with significant experience in the professional political sector, the OT is overwhelmingly comprised of people of color and queer people whose experience stems mostly from electoral politics and community organizing. This means the OT draw on a different set of repertoires than other members of National, influencing their perceptions, choices, and activities.

The Organizing Team played central roles in organizing and running the Regional Institutes and State Convenings, which were the site of most of my field work. As a result, many of my key participants are members of the organizing team. Their perspectives based on experiences at the intersection of formal, bureaucratic and informal, networked structures will be especially valuable to informing this project.

### *B. Data Collection*

Data includes field notes from participant observation, in-depth ethnographic interviews, and documents including training manuals and public-facing communications

from National. In this section, I discuss relevant philosophies relating to data collection based on the work of other ethnographers and interviewers, and also detail my own practices of observation and interviewing to clarify my data collection process.

1. Field Work and Participant Observation: Philosophy and Practice.

Participant observation is the backbone of data collection for this project. the two primary components of fieldwork are observation and interviewing (Wolcott, 2008). Observation involves "gathering impressions of the surrounding world through all relevant human faculties" (Adler & Adler, 1994, p. 378). I conducted 250 hours of participant observation at five Regional Institutes and the California Summit. I took notes primarily by hand (supplemented by a computer when possible), and typed the notes afterward, expanding the shorthand used in notetaking to full text. This process yielding roughly 180 pages of typed, single-spaced field notes describing my observations.

Each Institute and the Summit included three days of participant observation: the first day I participated in trainer-training, during which the Organizing Team trained a team of local group leaders and National staff on facilitation. The subsequent two days were the training itself, during which the newly trained team led a series of workshop modules with local group leaders. In addition to training sessions, I ate three meals a day with participants, engaged in planned after-hours activities such as off-site meals, and was frequently invited to spend time with participants at the end of each day, including visits to the hotel pool or the local bar. Each day involved an average of 14 hours of participant observation. Table 1 includes a table of each Regional Institute, location, home states represented, and number of participants; Table 2 summarizes the categories of participants (e.g. OT staff, group leaders, etc.).

**Table 1.** Site Visits, Dates, and States Represented.

| Site Visit/Event | Location | Date | States Represented |
|---|---|---|---|
| Southwest Regional | Phoenix, AZ | Oct 2017 | AZ, CA, CO, NM, NV, UT |
| Midwest Regional 1 | Columbus, OH | Feb 2018 | IL, IN, KY, MI, OH, WV |
| Southern Regional | Houston, TX | April 2018 | AR, CO, LA, OK, PA, TN, TX |
| Northwest Regional | Portland, OR | June 2018 | CA, HI, OR, WA |
| Midwest Regional 2 | Minneapolis, MN | June 2018 | IA, IL, IN, MN, WA, WI |
| California Statewide | Los Angeles, CA | Feb 2019 | CA |

**Table 2.** Participant Categories.

| Category | Description | No. of participants |
|---|---|---|
| National staff | Paid staff who holds a position within the National organization. Some of these staff interact directly with local group leaders on occasion (such as answering questions about election finance law or conducting webinars to introduce new tools), but are typically more removed from the grassroots than are members of the OT. | 23 (non-OT) |
| Organizing staff, a.k.a. Organizing Team (OT) | A subset of National staff whose roles are explicitly member-facing. These staff members interface directly with, train, mentor, and oversee volunteer group leaders. | 27 |
| Volunteer leaders, a.k.a. grassroots group leaders | A person who takes on a leadership role within their local group. Some of these leadership positions are formalized through processes such as elections; others are de facto leaders of small or less formal groups. | ~200-250 |

Exactly what to observe and record during field work is influenced by the theoretical framework of a study (DeWalt & DeWalt, 2011). However, the researcher should always begin by observing everything, taking nothing for granted and assuming everything to be of potential interest (Neyland, 2008; Moeran, 2009; DeWalt & DeWalt, 2011). Examining

everything for potential analysis can bring to light things that no one, including organizational members, has previously considered (Neyland, 2008).

Observations made in early stages of fieldwork often reveal the most because the strangeness of the setting makes it easier not to take things such as behaviors and social relations for granted (Neyland. 2008; DeWalt & DeWalt, 2011). There is value in seeing the setting as strange, and the longer the ethnographer remains in the field, the more familiar they become with things, activities, and people (Neyland, 2008). After the initial stages, the ethnographer may take deliberate steps to maintain a sense of strangeness, such as taking time out of the field, returning to field notes from previous observations to refresh a sense of newness, and supplementing ethnographic observations with other methods (Neyland, 2008).

Though strangeness in the field is a benefit and time makes the setting less strange, there are also benefits to accumulating field experience at a given site. The observer can learn to identify deception, which is often hidden from naïve observers (Fine & Shulman, 2009). Additionally, observations become more manageable and the nature of observation changes from attempting to observe and record everything to paying more attention to new, unusual, or different activities that the researcher has not previously observed (Fine & Shulman, 2009; DeWalt & DeWalt, 2011). Yet, this in turn can result in another bias, that of paying greater attention to and recording events that are unusual or rare, which may in turn influence analysis and dominate description. Care must also be taken to record the everyday, routine, and seemingly mundane.

In this way, I enjoyed the benefits arising from the constraints and contingencies of my field site: data collection was spread out temporally and geographically, with each three-day event separated from other events by several weeks or even months and occurring in a

different city with a different scene. I was able to achieve a degree of familiarity with each field site over the course of three long days there, but the time between events enabled me to approach each foray into the field with a sense of strangeness.

The structured nature of Regional Institutes also enabled me to track changes that occurred from one Institute to the next. As the trainings developed, some training modules were added, removed, emphasized or minimized, or altered in various ways. These changes to structure lent important insight into the priorities of those who were developing the trainings. For example, the Anti-Oppression training module initially occurred during the second half of the final day of training; it was subsequently moved to the first day, extended, and used as a sensitizing tool for subsequent training modules. This suggested that the module was considered important, prioritized in terms of scheduling, and viewed by trainers as a foundational portion of the training.

Even with all the care a researcher can take to observe everything, maintain strangeness, and focus on details, the researcher is human and a limit of participant observation is that the ethnographic picture will always lack certain information. Sometimes absences are relevant in that a different ethnographer, in recording and analyzing different information, may arrive at a different conclusion (Fine & Shulman, 2009). The place from which the observer observes is influenced by a matrix of factors including personal characteristics, past experiences, and current situations that converge to give any given observer a unique position and insight (DeWalt & DeWalt, 2011). Some information may be missed due to lack of training or knowledge.

Furthermore, observations are open to interpretations and misunderstandings, meaning that different researchers may not only observe different bits of information but may

also construct different interpretations (Fine & Shulman, 2009). This is insoluble, but important to acknowledge. To accommodate the potential for multiple interpretations, I paid attention to my own positionality and also to the multiple, varying accounts provided by participants. I frequently wrote journals or memos about my observations and the way my own role may have shaped my interpretation and worked to consciously acknowledge the ways my own perspective shaped my data collection. I also talked with other researchers about these issues, including asking for alternative interpretations. During analysis, I paid attention to multiple perspectives emerging from the data and understood these to be not one story, but many stories stemming from different viewpoints (Tracy, 2013). I attended to the interpretations offered by my participants and recorded as many perspectives and interpretations as possible. Using these strategies, I developed a better understanding of how what I saw might be interpreted in different ways and worked to incorporate varying perspectives into my data analysis.

DeWalt and DeWalt (2011) outline guidelines for observation, beginning with emphasizing the importance of details. Attending to details means seeing and hearing as much as possible, including specific word choices, nonverbal interactions, and facial expressions. One way to practice attention to detail is through mapping the scene. Mapping spatial positions (such as who sits with whom or how speakers position themselves relative to listeners) and interactions assist in understanding social relationships and help train the researcher to be detail oriented. It is also important to observe and experience the activities and events at the center of the researcher's interests on the project, enabling description and interpretation. Furthermore, the researcher should observe the activity and follow the "story line"; identify component segments of action; parse the regular, routine components from

more variable ones; keep an eye out for variations in the “story line” that reveal differences; and mind “exceptions” to norms.

*i. Observation Procedure.*

My observations began broadly and narrowed over time. Initially, I worked as hard as possible to observe everything, including interactions between group members, between staff members, and between group members and staff. I observed and took notes on formal and informal conversations, the content of training modules, questions asked by participants, the degree of attention paid or cross-talk during meetings, nonverbal gestures (e.g. clapping or snapping, touch, and facial cues) and paralinguistic cues (such as sighs, laughs, murmurs of agreement), and more.

It was clear, immediately, that I could not pay attention to everything. My research sites included 40-100 people, and breakout groups were common. I typically chose to sit with different breakout groups for each session in order to observe and compare processes. I chose groups based on two factors: first, and especially initially, I chose based on convenience and previous contact with one or more members of the group; and second, based on information suggesting it would be an especially useful group to observe. For example, if a group leader was identified as especially influential, I would ask to sit and observe as they led their breakout group in order to understand what practices may contribute to the sense of efficacy. I would ask permission to join them and was never turned down.

Outside of the formal training, I participated in informal gatherings as much as possible. These included lunches with participants (typically, all participants gathered in the conference center dining room), dinners with participants (often, one or more participants volunteered to coordinate post-training dinners), happy hour or late-night drinks at the hotel

bar or a nearby venue, and so on. I used these times to engage in informal conversations. When beginning a conversation, I would use polite social introductions (during which the leaders themselves typically identified themselves by name, home town, and group) to remind participants that I was there as a researcher rather than as a group leader. Sometimes during these conversations, I was a mere participant, engaging lightly in whatever discourse participants raised. Occasionally, I was able to guide the conversation to material related to my research topic. Whenever informal conversations turned to material that might be relevant to my research—whether or not I had steered the conversation in that direction—I gently but clearly reminded participants of my role as a researcher. Sometimes, the participants themselves would check in and ask me if I was engaging with them as a researcher or as a friendly acquaintance, and I would always clarify; specifically, I would tell them that while I am always a researcher, some material is not relevant to my research, and clearly explain whether or not the conversation at hand was of relevance. If conversations were especially interesting or relevant, I sometimes asked if it would be okay for me to take notes, and participants typically agreed. Once in a while, they would ask that I not include certain material, but in almost all cases the material in question was irrelevant to the study (such as their past work experiences or interactions with law enforcement). By balancing these strategies, I used informal gatherings both to build rapport with participants and to collect relevant data.

Because participants would occasionally ask that I not include material in my notes, or simply comment on the fact that I was likely interested in whatever they were saying (which was sometimes, but not always true), it stands to reason that their awareness of my presence may have influenced what information they shared and how they shared it. At

times, I had the sense that participants wanted to show off for me how well their groups worked together and how much they accomplished. At other times, however, participants seemed relatively candid about their challenges, especially when discussing those challenges with one another. Some participants even seemed glad to have a confidential source to whom they could confide some frustrations. Though it is possible and likely that participants adapted their disclosures based on my presence, I am also confident I gained some access to the *backstage* (Goffman, 1990), or the uncensored behavior of participants when they grow comfortable enough to not feel observed. I discuss this backstage access in greater depth below.

Since notetaking was common during trainings and breakout sessions, I was usually able to take notes while observing. Sometimes, especially during the anti-oppression training (parts of which were especially sensitive and did not involve notetaking by other members), I simply observed and stepped out as soon as possible to jot down my notes in the bathroom or outside. Occasionally I used my voice recorder to quickly record my thoughts and transcribed them later. Since lunches presented a brief interlude between trainings, I brought my notebook with me and was able to take notes when necessary. I was rarely able to take notes during dinner or drinks, so used headnotes that I transcribed later as soon as I returned to my hotel room.

*ii. Role of the Researcher.*

Like any ethnographer, I had to negotiate my role in the field. Goffman (1989) observed that fieldwork is a method of obtaining data "by subjecting yourself, your own body and your own personality, and your own social situation, to the set of contingencies that play upon a set of individuals… so that you are close to them while they are responding to

what life does to them" (p. 125). In addition to the ethical considerations involved, they must also consider how to strike a balance between insider and outsider, developing close relationships with participants in order to understand their perspectives while also maintaining sufficient distance to produce a valid analysis (Neyland, 2008; Wolcott, 2008). Importantly, balance refers not only to the physical closeness of being in or out of the field, but to the ability to move in and out of being a member of the organization (Neyland, 2008).

To balance closeness and distance, I alternated between positions on the spectrum from participant to observer. Junker (1960) identifies four positions: complete participant, participant-as-observer, observer-as-participant, and complete observer. He suggests that the complete participant position is not recommended, as complete participants risk "going native" and losing all perspective. Similarly, Junker also recommends against the complete observer perspective, as involvement as a participant contributes greatly to obtaining information. The middle two positions, participant-as-observer and observer-as-participant, allow for greater balance. In contrast, Forrest (1986) and Adler and Adler (1987) advocate for complete participation, what they call apprentice-participation and complete membership, respectively, which involves the researcher participating fully as a member. These authors argue that it is only by going native that one can fully understand the subjective reality of participants.

Ethical questions aside, I found it impossible to remain a complete observer or become a complete participant. On the one hand, organizing training is an all-hands-on-deck situation, with people constantly needed to chip in labor and help hang or take down posters, distribute materials, set up meal arrangements, or coordinate other activities. If ever I found myself purely observing a training, I would quickly be delegated by a passing staff member

to take part in some activity, finding myself back in an observer-as participant role. On the other hand, while I found myself becoming close to participants and identifying with their work due to the similar nature of my own organizing work, I have been grounded in my qualitative training since undergraduate studies in cautions against “going native.” These cautions remained always in the back of my mind. On more than one occasion, usually late at night following a social event with participants, I found myself worrying about my role as a researcher; I would take these occasions to memo and to reach out to fellow researchers to discuss my experiences. My inability to rest when I felt like I may be verging on the *complete participant* role assure me that I never fully took on that role, maintaining always a degree of reflexive observation constituting participant-as-observer or observer-as-participant.

Moeran (2009) and Fine and Shulman (2009) elaborate on the nuanced difference between participant and observer roles. They suggest that crossing the line from participant observation to a more involved observant participation represents a fieldworker’s rite of passage and has important implications for the quality of information gained. Shifting between these orientations involves gaining access to what Goffman (1990) calls front stage and backstage behavior. Front stage behavior represents a social front presented to strangers, and backstage involves greater authenticity and less pretense. Once a researcher crosses this line, they too may shift between front and backstage according to context and social role, and when participants recognize that the researcher knows and can navigate such front- and backstage rules, they may pretend less in the researcher’s presence (Moeran, 2009). Observant participation, Moeran argues, strikes the balance between involvement and detachment that characterizes the best analyses.

Interactions with my participants suggest that I was able to achieve back-stage access through observant participation, at least with members of the Organizing Team. On more than one occasion, OT staff members of RU made comments along the lines of, “I forgot you weren’t actually on staff.” Volunteer group leaders and non-OT staff made similar comments, seeming to view me as a member of the OT for the ease with which I engaged with both staff and group leaders (as well as, I believe, my deep understanding of the organizing philosophy).

Participants also gave less explicit cues suggesting they viewed me as an insider. For example, at all five Regional Institutes I was invited to spend time socially with participants; this always included OT staff, and often included group leaders who had close social relationships with the staff. During these periods of social interaction, participants shared deeply personal stories, jokes that differed significantly from the types of humor used during formal trainings (suggesting a sense of freedom from observation or uncensoredness) and blew off steam in ways that suggested they felt unobserved.

*iii. Ethical Considerations.*

Close relationships like those I developed with participants must be carefully considered. Though there is no bright-line rule for how close is too close, a variety of concerns must be examined. First, close relations can make participants vulnerable to exploitation by the researcher (Neyland, 2008). Second, being too involved may also result in the researcher directly or indirectly manipulating the setting (Neyland, 2008). If treated reflexively, such involvement may be useful, but if unchecked, the research may be unduly skewed (Garfinkel, 1963). Third, the researcher should consider the potential that key

informants may provide distorted accounts of the setting, and not allow any one participant to be the arbiter of "truth" (Neyland, 2008; Van Maanen, 1979).

Due to the close nature of some of these relationships and interactions, I actively worked to negotiate my role with participants in a way that would both afford be the wealth of information, criticism, and commentary that becomes available when a fieldworker is accepted as an insider (Moeran, 2009) and also maintain personal integrity and transparency about my role. Ethical conditions involve gaining access to a site without compromising editorial integrity while also agreeing to conditions of entry; must disclose research goals as fully as possible, while hoping such disclosure doesn't lead to rejection; must reassure readers that the research site suits the project, even if the site was not the ideal first choice; must demonstrate that the research will not cause harm to the organization, while knowing that findings may be detrimental or shine a less-than-flattering light; and, most of all, must appeal to subjects as sympathetic figures, while also maintaining a critical eye (Fine & Shulman, 2009).

I negotiated these ethical conditions with my participants. On a couple of occasions following deep disclosures made in social contexts, participants seemed to remember my role and inquired about how I would use any observations I had made during that interaction. I took those opportunities to clarify my research role and assure participants that I had no interest in making public their private experiences unrelated to my research role (for example, prior work history in professions that are often viewed as illegitimate or potentially illegal). While the fact of deep personal relationships *was* relevant to my research, the nature of disclosures made in the context of those relationships was not. On only one occasion did a participant ask me to exclude information that at the time I believed could potentially be

relevant to the study: a third-person narrative about the interactions between two staff members that preceded one staff member's departure from the organization. Ultimately, I do not believe that narrative was relevant or necessary to include in this study. Respecting the participant's wishes represented the ethical choice, and fortunately did not seem to compromise the integrity of my data.

In addition to negotiating my role explicitly with participants, I engaged in a great deal of reflection throughout the process. Reflection typically included personal memo writing, journaling, and discussions with fellow ethnographers. One fellow ethnographer and I who shared similar experiences took the opportunity to engage in deeper reflection through the process of writing a conference paper about vulnerability and intimacy in field work. During that writing, I explored my role as a researcher and the ethical considerations involved in becoming close to participants and hearing intimate accounts of their personal lives as well as their involvement in the organization. Engaging in this type of deep reflection allowed me to remain grounded in ethical frameworks for research while also enjoying the benefits of the close relationships I developed.

2. Interviews.

Interviews included both ethnographic interviews during field work and in-depth interviews to supplement the data collected during field work. First, during my time in the field, I conducted dozens of ethnographic interviews (Spradley, 1979. Ethnographic interviews differ from more formal interview styles in that they resemble casual, friendly conversations. The key distinction from a friendly conversation is that ethnographic interviews involve an explicit purpose that is made clear to the participant. During the course of these conversations the researcher slowly introduces new ethnographic elements and

offers explanations to the participant. The participant and researcher engage in an iterative process of learning together. The content of my ethnographic interviews is documented in my field notes.

In addition to ethnographic interviews, I conducted twenty in-depth interviews with RU members to follow up on information gleaned during the Regional Institutes and to learn more about participants' experiences than was possible in the brief time available between Regional Institute training sessions. Table 3 summarizes information on participants in these interviews.

**Table 3.** In-Depth Interview Participants.

| Title/Role | Date | Gender | Race | Region |
|---|---|---|---|---|
| Group Leader | June 2018 | F | Unknown | Southwest |
| Staff Organizer (OT) | Sep 2018 | F | Black | Southeast |
| Staff Organizer (OT) | Oct 2018 | M | Latinx | South |
| Staff Organizer (OT) | Oct 2018 | M | White | Northeast |
| Staff Organizer (OT)* | Oct 2018 | F | Latinx | West |
| Staff Organizer (OT)* | Oct 2018 | F | Black | East Coast |
| Staff Organizer (OT) | Nov 2018 | F | White | West Coast |
| Group Leader | Dec 2018 | M | White | West Coast |
| Staff Leader (Non-OT) | Jan 2019 | F | White | n/a |
| Group Leader | Jan 2019 | F | Latinx | East Coast |
| Former Organizing Director | Jan 2019 | M | White | n/a |
| Consultant/Trainer | Feb 2019 | M | White | n/a |
| Group Leader | March 2019 | F | White | West Coast |
| Group Leader | April 2019 | F | White | West Coast |
| Group Leader | May 2019 | F | White | West Coast |
| Group Leader | May 2019 | F | Unknown | West Coast |
| Group Leader | June 2019 | F | Asian | West Coast |
| Group Leader | July 2019 | M | Asian | West Coast |

*denotes a former group leader subsequently hired as National staff

*i. Epistemological approach.*

Different approaches to interviewing, or different "epistemological hats," will lead to different results. The classical positivist researcher may seek out "the facts," while the classical constructivist may seek out the interpretations participants have developed (Dick, 2006). Kvale and Brinkman (2009) use two metaphors to illustrate different approaches: the interviewer as miner and the interviewer as traveler. The miner sees the interview as an interactive process through which existing knowledge or views are extracted from the participant. "The knowledge is waiting in the subject's interior to be uncovered, uncontaminated by the miner. The interviewer digs nuggets of knowledge out of a subject's pure experiences, unpolluted by any leading questions" (Kvale & Brinkman, 2009, p. 48). This fits in the positivist paradigm. The traveler, on the other hand, operates in a

constructivist paradigm. The traveler sees knowledge as not existing prior to the interview, but created and negotiated through the interaction between researcher and participant. "The interviewer-traveler, in line with the original Latin meaning of conversation as 'wandering together with,' walks along with the local inhabitants, asking questions and encouraging them to tell their own stories of their lived world" (Kvale & Brinkman, 2009, p. 48).

I took a pragmatic approach to interviewing, balancing the notion that interviews involve knowledge co-creation (the traveler) with a belief that information can be gleaned that is meaningful outside of that particular context, such as information about how people experience and understand their social worlds (the miner). Yeo and colleagues (2014) argue that this is a common approach for contemporary qualitative researchers. I discuss the details of my approach below.

*ii. Interview Recruitment and Procedure.*

I used a combination of convenience, purposive, and snowball sampling to recruit in-depth interview participants. I began interviews with some of the participants with whom I have developed the closest relationships, as these were the easiest to set up and provided rich in-depth accountings of participants' experiences. (Some researchers may refer to this type of participant as an *informant*, though I avoid that terminology due to the connotations relating to policing.) I also sought out particular members whose perspectives lend themselves to providing insight on my questions, such as one of group leaders who played a key role in developing the Meso Tier. Finally, I used some snowball sampling, asking each participant if they have suggestions for people I should talk to. In a networked organization like RU, a form of *purposive snowball sampling* may be especially valuable: I can ask participants if they know of members who match certain criteria (e.g., have left the organization) who

would be willing to speak with me. However, snowball sampling also means my data was skewed toward participants who knew one another, and these participants may represent more deeply embedded members than a random sample. For instance, *all* of my participants were highly involved members—in part due to snowball sampling and in part due to the research context of the Regional Institutes, the sample did not include members who were less involved. Thus, my data cannot be generalized to all RU members, but is specific to RU leaders.

In-depth interviews combine structure with flexibility with the goal of achieving both breadth and depth of information (Yeo et al., 2014). I chose to use semi-structured interviews prioritizing flexibility, which let me follow the participant's narratives in interesting directions rather than attempting to standardize a rigid set of questions that would likely not cover the breadth of members' experiences. I began each interview with an interview schedule (see Appendices A-C), but frequently diverted from the schedule to follow an interesting and relevant conversational path opened by a participant. This is especially important in my research context because of the diversity of participants' experiences. Adapting to each unique experience during the course of the interview has enabled me to learn more than I would if I relied rigidly on a standard list of questions. Though participant observation represents the primary source of data for this study, shifting back and forth between interviews and observations can help yield richer findings (Tracy, 2013), and I found this to be the case in my data collection. As new data emerged through my observations, I often followed up on interesting threads in interviews. Similarly, if certain topics were raised during interviews, I would keep a more watchful eye for those patterns in my observation data.

Once I reviewed consent and confidentiality and answered any questions a participant had, I began by asking each participant how they came to be involved in RU, and this question often led to other interesting topics. Participants themselves raised questions or ideas that we would dig into, and I took the opportunity to dive deeply into the unique experiences of each participant. For example, Annette's participation in the Meso Tier meant much of our interview focused on the emergence of that structure. Maureen's interview, on the other hand, occurred as she was working to shift her group from a mobilization to an organizing focus, and our interview focused mainly on the challenges and practices involved in that shift. Each interview played out differently, and served as an opportunity to glean interesting and widely divergent data.

All of the in-depth interviews were one-on-one over the phone due to the geographic spread of participants (none were within easy driving distance). All in-depth interviews were recorded and fully transcribed by trained undergraduate research assistants. Some errors in transcription naturally emerged, especially when transcribing names of people unfamiliar to the undergraduate RAs. I read through each transcript to correct and verify all information. Interview transcripts totaled 400 pages of single-spaced text.

3. Documents.

I gathered extensive documents including training documents and outward-facing communications. Training documents include participant workbooks from each Regional Institute that contain summaries and worksheets for each training module conducted at that Institute. These were adapted over time and served as a source of data on how structures were (re)produced and formalized. Outward-facing communications include *The RU Guide* (the original action manual), *The RU Guide 2.0* (a recently released, updated version of the

*Guide* adapted to the new political context of a Democratically-controlled House of Representatives), RU's web site and supporter emails. Training documents were used as supplemental data sources for answering the research questions dealing with reflexive self-structuring. The documents map formalized structures, so to understand the self-structuring process, I used this data to supplement the interviews and field notes dealing with how the documents were produced and adapted.

### *C. Data Analysis*

I analyzed my data using Tracy's (2013) pragmatic iterative approach and blending in Fairhurst and Putnam's (2018) integrative approach to identify oppositions. Both of these approaches begin with primary cycle coding and then move to secondary cycle coding. Tracy's (2013) pragmatic iterative approach was useful for identifying a wide variety of codes and how they related to each other, while Fairhurst and Putnam's (2018) integrative approach was useful for identifying opposing discourses giving rise to tensions.

1. Unit of analysis.

As I developed interpretations of the data, I focused my analysis on *critical incidents* relating to membership negotiations and reflexive self-structuring. I use Angelides's (2001) definition of a critical incident as "a surprise or a problematic situation, which stimulates a period of reflection or a solution to the problem" (p. 430). Angelides emphasizes that critical incidents may be subtle, minor incidents—not necessarily large-scale or notable by outsiders—that happen in everyday interaction. Their *criticality* is not rooted in their sensationalism, but rather "based on the justification, the significance, and the meaning given to them" (p. 430), and the sense that the incidents reveal something about underlying patterns, motives, and structures (Tripp, 1993).

Rooting the criticality of an incident in the meaning imbued by participants makes this approach well-suited to my observational and interview data. In observations and interview, participants share the moments that seemed meaningful to them. I was able to identify critical incidents by looking for events or moments that participants identified as meaningful. In RU, certain moments may be identified by a number of different participants or used by participants as examples in repeated contexts such as trainings. Triangulating criticality in this way lent credibility to my analysis. For example, the 2017 legislative battle to protect the ACA and the 2018 election were both critical incidents identified by members across the organization, including in internal and external documents like training manuals and press releases. Other critical incidents were more subtle, like turning points in the professionalization process; again, these constituted critical incidents not because of any overt sensationalism, but because of the meaning imbued in them by participants (Angelides, 2001).

I focused my analysis on critical incidents relating to membership negotiations and reflexive self-structuring, as guided by my research questions. Critical incidents relating to membership negotiations included moments at which a participant identified as becoming a member, becoming a leader, or engaging in negotiation about the meaning of membership. For example, many members relayed to me the surprise they felt at suddenly becoming leaders in their organization, stimulating reflection as to how to negotiate that role. Critical incidents relating to reflexive self-structuring included emergence of new structures, formalization of informal structures, and negotiation of existing structures. For example, an incident regarding the response to accusations of harassment by Senator Al Franken created a

problematic situation that members needed to reflect upon in order to proceed, and that reflection stimulated the emergence of new structures aimed at solving similar problems.

Within critical incidents, I focused on examining the ways tensions relating to leadership and transactional-transformational logics played out and influenced the negotiation of those incidents, examined discourse practices relating to these tensions, and looked for ways hybridity enabled and constrained approaches to the tensions in the context of membership negotiations and reflexive self-structuring. I discuss my coding process in depth in the next section.

2. Coding Process

I used a combination of Tracy's (2013) *pragmatic iterative approach* to qualitative coding and Fairhurst and Putnam's (2018) *integrative approach* to identifying oppositions. Both of these approaches begin with line-by-line coding and proceed iteratively through analysis to reach conclusions. I discuss each of these approaches in turn.

ii. *Pragmatic Iterative Approach*.

Primary cycle coding involves the initial coding activities (not just on the first round of coding) in which data is examined and words or *codes* are developed to describe the data's essence (Tracy, 2013). Primary-cycle coding results in first-level codes, which focus on descriptions of basic activities and processes, or "what" the data shows. Charmaz (2011) encourages the researcher to focus on gerunds during this phase, such as laugh*ing*. First-level codes do not include analysis or interpretation—simply description. In my data, first-level codes included things like "storytelling," "developing norms," and "decision-making." I also included codes that were not formatted as gerunds, including "electoral" to denote the focus of certain activities and "race" to denote discourses relating to race.

During secondary cycle coding, the researcher moves beyond the descriptive coding of the primary cycle and constructs analysis and interpretations of the data (Tracy, 2013). These are informed by a review of the literature, and the researcher uses the literature to focus in on a set of constructs. Axial coding involves identifying relationships and connections between the codes that emerged in open coding. Codes may be grouped together or structured in hierarchies. During axial coding, I organized primary cycle codes based on the constructs identified in my research questions. For example, I binned the "electoral" code under the "transactional strategy" code developed based on the literature. Some of the data I had coded under "storytelling" was re-coded as "narrative" to denote narrative *training*, while storytelling indicated a participant sharing an organizing story; "narrative" was binned under "transformational strategy." Throughout the process, I engaged in the constant comparative method to compare data applicable to each code (Charmaz, 2006).

Though all of my data had been collected prior to coding, I was able to identify theoretical saturation when coding ceased to yield new information. I continued coding all data that I had collected so that all field notes and interviews were coded.

*ii. Integrative Approach to Identifying Oppositions.*

During primary cycle coding, I drew on Fairhurst and Putnam's (2018) integrative approach for identifying oppositions. This was a useful approach to draw out the tensions that were a main focus of my research questions. The approach involved using line-by-line coding to identify terms, arguments, and actions that constitute a Discursive repertoire. For example, the Discursive repertoire of transactional mobilizing involved terms like "outreach" and "getting out the vote," arguments rooted in a logic of reducing the barrier to participation for as many people as possible, and actions such as planning rallies and writing postcards.

The Discursive repertoire of transformational organizing involved terms like “deep relationships” and “family,” arguments rooted in the logic of cultivating individual commitment and interpersonal relationships, and actions such as leadership development.

As I moved to higher level coding, I was able to identify contrasting repertoires constituting oppositions (Fairhurst & Putnam, 2018). For example, it was clear in my data that transactional mobilizing and transformational organizing functioned in opposition to one another; participants drawing on these discourses often expressed a sense of conflict, desiring to engage in both transactional and transformational repertoires but needing to choose based on a limited set of resources. The push-pull between the two repertoires constitutes a *tension*. These Discourses have traceable histories in the context of grassroots organizing, as laid out by Han (2014), and the tension between the Discourses was in line with existing literature on these repertoires.

The next step of Fairhurst and Putnam’s (2018) integrative approach is exploring which Discourse appears more dominant and how by “focus[ing] on the cultural background, training, and sociohistorical context that underlie power or the agency of actors’ behaviors” (p. 10).

Following this step, the researcher explores how the oppositions manifest themselves in little “d” discourses by examining specific examples of how language is used in the data. Two ways of doing this are examining sequencing moves and category work. *Sequencing moves* involve actions and reactions in which oppositions are enacted through balancing, prioritizing, or cycling between poles. The interactions also “position the individuals or groups who identify with one pole over the other vis-à-vis their respective interests and how they equate, dominate, or compete with one another” (Fairhurst & Putnam, 2018, p. 11).

*Category work* deals with the ways actors use language to classify actions, people, situations, or experiences. By analyzing sequencing moves and category work, the researcher can understand how oppositions are enacted and responded to by organizational actors.

Finally, to understand how actors managed oppositions, I drew on the previous five steps, "especially integrating knowledge from contrasting repertoires, points of clash, types of oppositions, power issues, and organizing dynamics" (Fairhurst & Putnam, 2018, p. 12). By identifying Discursive repertoires like transactional mobilizing and transformational organizing, I was able to "track how oppositions emerge, splinter into sub-tensions, and fit together" and "examine the push-pull of Discourses and their intricacies, as well as which ones emerge as more powerful based on the responses they engender" (Fairhurst & Putnam, 2018, p. 5).

### *D. Summary*

This project uses ethnographic methods to answer research questions about membership, structure, and tensions in the hybrid grassroots organization Resistance United. Data was collected mainly through fieldwork and interviews, with documents used as supplementary data. Analysis was conducted by blending a pragmatic iterative approach to coding with an integrative approach to identifying oppositions and tensions. I turn next to my findings.

# IV. Findings

In this section, I describe findings that respond to research questions asking about the tensions between transactional and transformational repertoires and between multiple leaderships; how negotiation of these tensions influenced the structuring process of RU. including in the membership negotiation and reflexive self-structuring flows; the enabling and constraining potential of hybridity for negotiating the tensions; and the relationships between membership negotiation and reflexive self-structuring. I discuss the impact of professionalization on the Goldilocks problem of structure and the ways professionalization—by pulling strongly toward the formal pole of the structural tension—can unintentionally delegitimize volunteer leaders, even as some of those volunteers themselves perceive professionalization as a positive trend. I also explore outcomes such as the subordination of informal structures to formal ones and transformational repertoires to transactional ones, which extends current theorizing around formalization to map some of the communicative processes that contribute to (re)producing increasingly formal structures. A summary of the findings is presented in Table 4. On the basis of these findings, I offer a model illustrating the mutually influencing relationship between membership negotiation and reflexive self-structuring, focusing on the influence of tensions on those processes (Figure 1).

**Table 4.** Research Questions and Summary of Findings.

| Research Question | Summary of Findings |
|---|---|
| RQ1A: How does the push-pull tension of transactional and transformational logics influence membership negotiations? | Grassroots membership constituted through *doing* (transactional) and *becoming* (transformational). Grassroots leadership constituted through *becoming* (transformational) a leader by *doing* (transactional) leadership practices. National leadership constituted through *professionalization* (transactional). |
| RQ1B: How does the push-pull tension of transactional and transformational logics influence organizational self-structuring? | Structures (re)produced to facilitate both large-scale mobilization (transactional) and membership sustainability (transformational), with stronger pull toward transactional due to early influences of the *Guide* and ongoing trend toward professionalization. |
| RQ2A: How does the transactional-transformational tension relate to the (re)production of formal structures? | Formal structures (re)produced through either-or approaches to the transactional-transformational tension, with emphasis on the transactional pole (distributed fundraising, endorsements, VAN). |
| RQ2B: How does the transactional-transformational tension relate to the (re)production of informal structures? | Informal structures (re)produced through both-and responses to the tension. However, informal structures often became formalized or were (re)produced as subordinate components of formal structures. |
| RQ2C: How does the transactional-transformational tension relate to the (re)production of hybrid structures? | Hybridity ("*aligned decentralization*") tended to pull toward formality with informal structures (re)produced as components of formal ones, resulting in transformational logics employed largely to facilitate transactional work. |
| RQ3A: How does the tension between multiple leaderships influence hybridity in the membership negotiations flow? | When meaning converged around members' roles relative to one another, the tension between multiple leadership groups could be generative and led to (re)producing hybrid leadership. When meaning diverged, volunteers felt their work was devalued/delegitimized and questioned their roles. |
| RQ3B: How does the tension between national and local leaderships influence hybridity the reflexive self-structuring flow? | Convergence in meaning around members' roles constituted an inside-outside strategy useful for accomplishing org goals. Divergence in meaning resulted in volunteer leaders seeking to (re)produce structures that would privilege their own leadership, while National staff responded by (re)producing parallel structures privileging professional leadership. |

| | |
|---|---|
| RQ4A: (How) does hybridity enable/constrain both-and approaches to the tension among multiple leaderships? | Hybridity enabled both-and approaches through *aligned decentralization*, but the pull toward formal, professionalized logics presented a constraint. Hybridity enabled volunteer leaders engaged in resistance to draw on informal structures and exert power, maintaining the tension with National and preventing domination. Hybridity also enabled volunteers to negotiate the tension between formal and informal leaderships within local groups. |
| RQ4B: (How) does hybridity enable/constrain both-and approaches to the transactional-transformational tension? | Hybridity enabled volunteer leaders to act autonomously to (re)produce practices that incorporated both transactional and transformational repertoires. However, members were constrained by large-scale participation, responsiveness to networked members, political pressures, and professionalization. |
| RQ5A: How does organizational structure influence members' perceptions and constitution of their roles? | Early structures (e.g. the *Guide*) shaped who became a member. Emerging structures subsequently required re-negotiation of membership around new roles enabled by those structures. |
| RQ5B: How do members' perceptions and constitution of their roles influence the (re)production of organizational structure? | Constitution of membership as *doing* and *becoming* shaped the emergence of structures aimed at helping members to enact those roles. Re-negotiation of membership around emerging roles (e.g. volunteers as holding National accountable) led to (re)production of new structures such as Meso Tier. |

Throughout this section, I provide examples, quotes, and descriptions to substantiate my claims. Quotes have been edited for clarity and concision (e.g. removing extraneous filler words such as "um" and "like" unless those words contributed to the meaning conveyed by the member, such as suggesting uncertainty) and, occasionally, to mask the identity of participants (e.g. removing the name of a particular RU group or an identifying location). I have taken care to preserve the meaning of all quotes and paraphrased contributions.

Table 5 shows an index of participants who are quoted or named in the findings; this is not a complete list of all participants, but rather is intended to provide clarity to the reader and minimize repetitious inclusion of background information.

**Table 5.** Index of Participants Quoted or Named in Findings.

| Leadership group | Name | Race | Gender | Age | Turf |
|---|---|---|---|---|---|
| Grassroots volunteer leadership | Alexa | unknown | F | unknown | Purple |
| | Amal | Latinx | F | 50s | Blue |
| | Annette | white | M | 40s | Blue |
| | Isabel | Latinx | F | 40s | Purple |
| | Joseph | white | M | 60s | Red |
| | Karen | white | F | 60s | Blue |
| | Krista | white | F | 40s | Red |
| | Landon | white | M | unknown | Blue |
| | Leslie | white | F | 40s | Blue |
| | Lilly | unknown | F | unknown | Blue |
| | Maureen | white | F | 30s | Blue |
| | Robert | white | M | 30s | Red |
| | Vivian | white | F | 50s | Blue |
| National (member-facing/OT) | Adam | white | M | 50s | Purple |
| | Crystal | Black | F | 40s | Purple |
| | Darin | Latinx | M | 20s | Red |
| | Giselle | white | F | 20s | Blue |
| | Jess | Black | F | 20s | Red |
| | Kayla | Black | F | 20s | Blue |
| | Lindsey | white | F | 20s | Blue |
| | Natalie | Latinx | F | 30s | Purple |
| | Ray | white | M | 20s | Red |
| | Reilly | white | F | 30s | Red |
| | Taylor | white | M | 20s | Blue |
| | | | | | **Department** |
| National (non-member facing) | Amanda | white | F | 30s | Organizing |
| | Amy | white | F | 30s | Executive |
| | Eli | white | M | 40s | Organizing |
| | Jacob | white | F | 30s | Executive |
| | Julie | white | F | 30s | Organizing |
| | Tammy | white | F | 30s | Political |
| | | | | | **Role** |
| Other | Craig | white | M | 40s | Consultant/trainer |
| | Nate | Black | M | 20s | Consultant/trainer |

### A. *Repertoires and their Influence on Membership Negotiation*

RQ1A asked about how the push-pull relationship between transactional and transformational repertoires influenced membership negotiation. To review from the earlier sections, transactional repertoires are guided by rational choice logics relating to maximizing gains by reducing costs—that is, mobilizing as many people as possible for actions like protests or voter registration drives by reducing the barrier to entry; transformational repertoires refer to deep organizing strategies such as relationship building and leadership development that result in enduring change either within an individual or in the relational bonds between two or more individuals. In RU, membership is constituted at multiple levels including local and National, both of which are influenced by the tension between repertoires. At both levels, I find that membership is constituted as *doing* political organizing to oppose Trump and advance a progressive agenda, which is rooted in the transactional repertoire, and as *becoming* accountable to progressive values including anti-oppression, which is rooted in the transformational repertoire. By drawing on both types of repertoires, membership negotiation takes a both-and approach to the transactional-transformational tension. At the National level, however, membership is also negotiated in terms of professionalization, which is viewed as a proxy for legitimacy; by legitimizing National leadership on the basis of professionalization, this sensemaking framework unintentionally delegitimizes volunteer leadership.

My findings in this section are oriented heavily around negotiations of leadership; this is because the data suggested that leadership was a key focus of membership negotiation among participants in this study. This is likely due in part to the participant sample: virtually all participants were leaders in some capacity, either within their own groups, within a

network of groups, or within the National organization. Thus, a significant focus of my data analysis and findings on membership negotiation are oriented around the notion of leadership. To preview my findings, *leadership* in RU is constituted differently at the grassroots and National levels. At the grassroots level, leadership involves a process of *becoming* through personal growth and development, which enables the *doing* of leadership practices such as empowering others to engage in both transactional mobilizing and transformational growth. At the national level, leadership is rooted in professionalism, which pulls toward the transactional pole. Thus, while membership at the grassroots level is constituted in terms of a both-and approach to the tension, at the National level, there is a strong pull toward the transactional pole. Since the grassroots and National levels are themselves in tension, the pull toward the transactional pole at the National level may impact how the transactional-transformational tension is managed at the grassroots level, as well. I discuss these findings in greater depth throughout this section.

1. RU Membership as *Doing* and *Becoming*.

For all members in RU, membership is constituted as an active process that involves *doing* political action and *becoming* progressive. These constitutions of membership bring together multiple repertoires. *Doing*, oriented around the activities outlined by the Guide, is rooted in the transactional repertoire of mobilization; *becoming*, which involves political education, is rooted in the transformational repertoire of deep organizing. Different aspects of membership are constituted by different poles of the tension, but these aspects complement each other, enabling the poles to work together. Membership, then, is constituted using a both-and approach to the transactional-transformational tension.

The *doing* aspect of membership is laid out explicitly in RU's founding document, the Resistance United Guide, which stated: "If progressives are going to stop [the Trump agenda], we must stand indivisibly opposed to Trump and the Members of Congress who would do his bidding." The Guide goes on to outline ways to take action, including pressuring Members of Congress through office visits and public protests. Anyone who takes action based on the *Guide* can be a member of RU—there is no formal barrier to entry. The value of membership is thus placed on what members *do*. As one group leader, Amal, said, "You're only as good as the last thing you did."

The *doing* aspect of membership is rooted in the transactional repertoire that guide the types of activities that were outlined in the *Guide*. The overarching goals of disrupting Trump's agenda and protecting/advancing progressive policies break down into campaign-level goals such as mass protests and mobilizing constituents to place pressure on Members of Congress. These campaign-level goals are rooted in a transactional repertoire of reducing barriers to entry and mobilizing protesters and voters to take action.

The Guide directly situates members—the "we"—as "progressives." *Progressive* is a broad umbrella term for political ideologies on the left of the spectrum, facilitating a great deal of strategic ambiguity. This ambiguity enables a diverse membership that ranges from Democratic socialists to "recovering Republicans" (as some members identify). Though the words of the Guide cited at the beginning of this chapter were written by a small group of members—the Guide's authors—they provided a framework for membership in RU as a whole, calling on those who agreed with that edict to form groups and begin taking action. Members who formed or joined RU chapters were people for whom the Guide's purpose resonated and who broadly agreed upon the principles it set forth. Members overwhelmingly

report joining RU as a direct outcome of reading and agreeing with the principles set forth by the Guide. These principles provided a central, if strategically ambiguous, ideological framework for membership negotiation going forward. The central tenets enable members to take coordinated action even when their particular frameworks for "progressivism" may differ. As Annette, a volunteer member stated in December 2018, "The thing that's at the heart of Resistance United-ness is combating the Trump agenda and advancing a progressive agenda, right? The advancing a progressive agenda is something which takes a lot of different forms in different parts of the country, but it is pretty fundamental to Resistance United-ness even if it's less clearly stated."

RU's constitution of progressivism not as a stable state of *being*, but rather as a process of *becoming,* is most evident in RU's anti-oppression training agenda. The RU *Guide* highlights not only the goal of resisting the Trump agenda (*doing* resistance), but also incorporates key values that played a role in shaping membership (*being* progressive). Based on the *Guide,* it is not enough to only *do* political action—that action must be rooted in an ethic of inclusion, tolerance, and fairness.

According to participants at the Regional Institutes, being inclusive, tolerant, and fair requires *becoming anti-oppressive*, or learning to be accountable to not only embracing progressive values but also to enacting them. There are two reasons why RU members prioritize anti-oppression work: first, accountability to central values; and second, in order to effectively accomplish political goals such as making the organizing space friendly to people of diverse identities and partnering with organizations that are led by people of color and other marginalized groups. As one staff organizer, a Black man, said, "RU is full of white people working on issues that don't affect white people." A Latinx organizer emphasized that

"if we are not teaching political education, if we are not teaching white folks to view their work through an anti-oppression lens, we're not gonna win." Therefore, for RU members to *be* progressive, they must engage in a process of constantly *becoming* anti-oppressive. *Becoming* anti-oppressive is foundational to cultivating accountability to RU's values.

Since the membership of RU is overwhelmingly constituted by people of privilege, *becoming* anti-oppressive involves engaging with transformational logics relating to political education that enables members to recognize, engage with, and check their privilege. As one grassroots group leader—a white woman—commented, "I feel an obligation to use my privilege to raise up people who don't have those privileges. But I need to be educated in how." Members emphasize that *becoming* anti-oppressive is a continual and iterative process, constituting membership as a process of growth and development. Members recognize the importance of anti-oppression education and frequently commented on both how necessary and how meaningful that education was. In post-training surveys following the Regional Institutes, the most commonly identified benefit of the training was the anti-oppression module.

Even RU staff members, who are typically more experienced in political organizing and have more diverse lived experiences rooted in intersectional identities, are expected to engage in the growth process of anti-oppression training. As one staff organizer, Darin, explained:

> Anti-oppression training is something that everybody has to do. And the reason that I'm saying this is because even within the national group of staffers, we are a very diverse group. We are, you know we have young people, we have old people, we have people in between, we have people of all

> races and ethnicities, of all sexual orientations, and even amongst us we I think we recognize rightfully so that we still have implicit biases that we need to work on fully. And so, the teaching component, I think, is as much about holding ourselves accountable, as it is anything else. One of National's most important roles is teaching anti-oppression, teaching harm-reduction in the work that we do, and learning to understand what our implicit biases and learning how we can check ourselves and others so that we don't do those things to people and so that we don't harm the very people that we're trying to help.

This statement highlights how even while National serves a leadership role in educating grassroots members on anti-oppresive practices, National leaders also understand their roles to involve participation in their own a self-reflective growth process. National leaders saw this as a key to living up to organizational values, but also for more pragmatic purposes. Becoming anti-oppressive would enable National leaders to work with people of diverse backgrounds—including their fellow National staff—and to model anti-oppressive practices for the group leaders with whom they worked. This, in turn, would supprot group leaders' own practices of becoming that helped those leaders to conduct outreach, collaboration, and other efforts in their local communities.

Anti-oppressive political education is rooted in transformational logics of personal growth, or the idea of *becoming* accountable through a process of transformative education. This is exemplified by the way members value growth as opposed to achievement. Members acknowledge that RU members arrive at the organization with different degrees of political education and self-reflexivity. Trainings were implemented in order to help those participants

grow. One staff member, Amanda, explained that the goal of anti-oppression training was not to simply have members stop doing a particular thing (such as a microaggression), but rather to have them engage in a deeper process of self-reflection in order to grow. Rather than laud members for how "woke" they *already* are, value is placed on members' willingness to engage in the accountability process.

The value placed on willingness to engage in growth is foregrounded in the norms for communication that are agreed upon by participants at the Regional Institutes. Norms, or community agreements, are rules that members collectively construct and agree to at the beginning of the training session. These include norms such as "correction is a gift," and "get comfortable with discomfort." Both of these norms take for granted that members will slip up and say or do things that do not fully align with progressive and anti-oppressive values due to the ingrained biases they are working to overcome. "Correction is a gift" encourages members to speak up and correct behaviors that are out of line with shared values, and to accept such corrections with grace. "Getting comfortable with discomfort" acknowledges that being corrected is uncomfortble, and growth can involve what one member called "growing pains." Thus, members constructed accountability to values not as perfect behavior, but as willingness to correct, be corrected, and get uncomfortable—in other words, to engage contantly in the process of *becoming*.

Membership is ultimately negotiated using a both-and approach to the transactional-transformational tension. Membership is in part about *doing* (transactional) and in part about *becoming* (transformational). The two poles of the tension complement each other and also feed into one another. That is, the transformational logics of training and education enable more effective use of transactional logics in that training and education enable members to

more effectively engage in mobilization. In other words, mobilization strategies are scaffolded by deep organizing strategies. Members who underwent significant training and political education developed the skills, commitment, and resiliency necessary to participate in large-scale, long-term transactional mobilizing.

2. Grassroots Leadership as *Doing* Empowerment by *Becoming* a Leader.

Again, a significant focus of membership negotiation among participants in this study had to do with negotiation of leadership roles. Grassroots leadership in RU builds on the constitution of membership (*doing* political action and *becoming* progressive and anti-oppressive) and incorporates the function of empowering others to do the same. Leadership at both the grassroots and National level is constituted as training and empowering others to take action; in other words, leadership is about enabling others to become active members of RU and developing other leaders within RU. Leaders in turn are responsible for mobilizing other members to take action (transactional) and developing other leaders (transformational).

Leadership was frequently described using metaphors that suggested the role of leadership was to mobilize others. "Air traffic control," "professional fire herders, pushing the fire in the right direction without getting burned," and "building a plane while flying it," were all metaphors used to describe grassroots leadership. These metaphors all suggest that grassroots leadership was constituted in terms of channeling motion in a particular direction, often in high-stress situations.

Grassroots leaders participate in empowering others to do activism in a variety of ways. As presented by Giselle, an OT staff member, at the Regional Institutes, "Leadership is about accepting responsibility for enabling others to achieve purpose in the face of uncertainty." Data suggests that helping people to "achieve purpose" can occur in several

ways, including helping members learn new skills, tap into existing skills, or make connections with others. One member, Joseph, focused on empowerment, stating that leadership is "helping people who want to do stuff and don't know how." In Joseph's construction, leadership is about empowering others to become leaders by helping them learn how to "do stuff." Another, Lilly, explained leadership in terms of tapping into exisitng skills: "My goal for myself is really to kind of work with a group of people who I know to be dedicated volunteers, always show up, but to try to gently guide them to the point where they realize oh, 'this is something I can actually do on my own and Lilly is here to support me.'" For Lilly, leadership was about helping others realize the skills they already had, and shift from a heavy reliance on her guidance to a more independent mode of operation. A third emphasized the relational element that Lilly began to tap into, saying that leadership is about "building relationships and making connections between like-minded folks." In this construction, leadership is about making connections and helping others to build relationships. Those relationships and connections, in turn, allow people to develop as leaders.

Leaders also participate in developing other leaders. Developing leaders is in part about spreading out the *doing* among more people. A metaphor that tapped into this constrution was one often repeated by both group members and National staff: "A choir keeps singing while one member is breathing." This metaphor was explicitly linked to the need to develop leaders among the grassroots membership in order to foster sustainable *doing* of mobilization. When membership is constituted in terms of constantly *doing*, it is difficult for any given member to step back; however, by cultivating a sustainable leadership

structure, grassroots leaders facilitate opportunities for breaks. When other leaders are present to continue doing the work, each member is given an opportunity to breathe.

A related metaphor was used by Annette to illustrate the role of leaders as a cooridnation structure:

> If you're the central organization, your job isn't to direct, right? You're not, you're not the conductor of the orchestra. You know, you're more like the arrangement, right? You know that you've got the brass section and you know that you've got the strings and your job is to figure out how the brass and the strings can interact and make something beautiful. And that’s literally what I do.

Annette, a leader within a network of groups called the Meso Tier (discussed in depth below), saw her role as coordinating an array of different skills (or instruments) to bring various threads of work together in harmony. She emphasized that her role was not to direct, but rather to coordinate work that was being done in various areas in order to facilitate synchronicity.

Leadership was constituted in terms of a *becoming* process similar to the process described above of *becoming* accountable to values; *becoming* a leader involves a process of leadership development, and leadership development typically falls under the umbrella of transformational logics (Han, 2014). Some leaders are intentionally developed by others. For example, one member, Maureen, described working closely with a fellow group member to cultivate that group members as a leader. Maureen taught her about organizing versus mobilizing, encouraged her to implement deeper organizing strategies, and guided her through the process of holding a large event. Another member, Krista, took a somewhat

different approach. Whenever a member of her group approached Krista with an idea, Krista suggested that the approaching member be the one to spearhead implementation of that idea. Krista would be there to support the member, but it was up to them to take on a leadership role. These two leadership development strategies differed somewhat, but both represent a transformational repertoire of cultivating leaders.

However, my findings suggest that in RU, becoming a leader occurred not only through intentional leadership development processes, but also as unanticipated consequences of transactional mobilizing. This was especially common in the early stages of RU, before any intentional leadership development structures had been implemented. Many of the first-time activists who found themselves drawn to Resistance United quickly found themselves in leadership positions unlike any they had previously held and had to quickly develop the skills necessary for those positions—in terms of the metaphor above, building the plane while flying it. There were also two interview participants who said they took on leadership positions when a previous leader had to step down suddenly due to health or other reasons, suggesting a transactional entry point to what became a long-term leadership role. Though those two leaders did step into formal roles, they did so almost accidentally; as one leader, Landon, said, "I decided I'll take over temporarily for her, and I didn't realize what that meant." These members, like many group founders, did not realize what a leadership position entailed until they were already in the process of becoming leaders. This suggests that becoming a leader *can* occur through a deliberate, guided transformational process, but it can also occur almost by accident, through the process of *doing*. Through these growth processes, members become leaders who work to empower others.

Maureen described what informal leadership looked like in her group, explaining the role of Congressional liaisons. Those liaisons communicate directly with Congressional offices, such as to schedule meetings, "but they're also the ones who, when it comes time to meet with that Member of Congress, which typically we're doing once a month, they're reaching out to our membership to say 'who wants to join in to this meeting,' and 'here's the start of an agenda, please put your stuff in.'" Interestingly, though the Congressional liaisons functioned as leaders, the liaison position was not a formal role. "There are no leadership roles," said Maureen, "like there's nothing that's defined. Even this person who is the, that I mentioned, who's the liaison, like it's not even an official role that he's fulfilling. He's just sort of stepped into that." This report exemplifies what data from participants across the country suggests: leadership is rooted in doing the work of empowering others, not necessarily in formal titles or roles.

Grassroots leadership is thus rooted in a logic of transformation from civic observer to determined organizer working to empower others. In RU, often this occurred not through a deliberate process, but as a result of participation in transactional mobilizing. It was only after the Regional Institutes began in October of 2017 and group leaders were trained in leadership development practices that it became common for leaders to engage in deliberate, intentional transformational practices of developing others leaders. That shift will be discussed in greater depth in subsequent RQs.

3. National Leadership and Professionalization.

While all members—grassroots and National alike—constitute membership in terms of both *doing* mobilization, *being/becoming* accountable to progressive values, and empowering others, data suggested an additional influence on membership negotiation at the

National level: professionalization. The trend toward professionalization involves increasing formality patterned in terms of bureaucratic hierarchies, rationalization, and market-based logics (McAllum, 2012). In RU, professionalization (re)produced transactional repertoires, creating a stronger pull on that pole of the tension.

The pull toward transactional repertoires emerged in part through the exigencies of the situation in which RU operated and in part through the translation of National leaders' past work experiences. First, professionalization emerged in response to the need for better, faster coordination among local groups. This was necessary considering the political situation in the U.S. in the early months of RU. In early 2017, RU members recall, Trump administration initiatives were announced faster than activists could respond—seemingly each day there was a new executive order signed or legislative item introduced. Much of the activism in which RU members were engaged was transactional—groups were mobilizing as many people as possible, as quickly as possible, without the time necessary to engage in deeper transformational work. Ideally, groups would have had time to clearly and reflexively plan a long-term strategy and work intentionally toward big-picture goals by developing a sense of community and taking time to build relational bonds; instead, their focus constantly shifted between the most urgent of a menu of urgent issues arising rapidly and unpredictably based on the administration's initiatives. The emergence of National leadership was aimed at increasing coordination among groups to make the push-back more coordinated and thus more successful. According to one founding member, Amy, "the national entity would be about, one, making our voices greater together for strategic priorities. And then two, really trying to be a support and service provider to those groups." Both of these priorities—

combining power to maximize impact and providing support in return for ongoing involvement—are rooted in transactional logics.

The pull toward transactional logics was exacerbated by professionalization as National leaders incorporated their previous work experiences and expertise. National staff virtually all had previous work experience in professionalized politics. For members of the Organizing Team, this typically included previous experience on electoral campaigns. For staff in other departments (such as Political, Communications, and Finance), this included some electoral experience as well as experience working in think tanks, Congressional offices, advocacy organizations, and other professionalized political contexts. These previous experiences influenced how staff approached the transactional-transformational tension in RU, especially for the OT. In the following paragraphs, I will discuss the ways that staff members' previous work experiences structured their leadership in RU, focusing especially on the ways past electoral organizing experience resulted in a stronger focus on transactional repertoires among OT leaders.

Several members of the OT, in particular, shared with me how they drew directly on their electoral organizing experiences in their work with RU groups. In many ways, they found the transferabilty of skills helpful. For example, as Ray noted, past electoral organizing meant that he and his fellow OT staffers understood how to track, log, and report important data, like how many doors were knocked or numbers dialed during an outreach campaign. They were also accustomed to the rapidfire pace of the political cycle and knew how to pivot in response to urgent, emerging issues. However, transfering those skills imported a particular repertoire—one rooted in electoral strategies—into RU. This was notable to Craig, a member of the consulting team brought on to help RU develop its training structure. As

Craig said, “the organizing staff was primarily hired out of the electoral campaign worlds, [and they had] an approach to electoral politics that was more traditional and mobilizing based versus experiences of going deeper and really focusing on leadership development and what it takes to develop organizers and volunteers who can actually in many ways autonomously run their teams.” The professional political expertise important to RU, then, exacerbated the pull toward transactional logics. One implication, Craig noted, was the potentail for burnout—campaign staffers are not only accustomed to a certain type of repertoire, they are also accustomed to working an intense 15-18 hour-per-day schedule for short bursts of time (usually the several months leading up to an election); they are sprinters, not marathoners. Yet in RU, staff needed to gear up for the long haul—and Craig expressed concern that the emphasis on transactional repertoires may come at the expense of transformational work necessary to cultivate resilience and long-term commitment.

Professionalization was seen as a marker of legitimacy by members, including grassroots leaders as well as staff. One grassroots leader, Isabel, shared that a critical incident for her was the moment she realized that National was becoming professionalized—specifically, that National staff were required to go through a formal interviewing and hiring process, even if those potential staff members had been heavily involved in the creation of the Guide. For her, recognizing the shift toward professionalization was “the moment when I would say I recognized, wow, this is transitioning into something much bigger… And this this has the possibility to become something extraordinary.” For Isabel, the “extraordinary” potential came not from the spontaneous emergence of thousands of grassroots groups, or even from her own experience planning a rapid response action that was televised on a

national network. That potential, for her, came from the emergence of professionalized structures.

Similarly, a staff member from the South, Reilly, identified professionalism as a marker of legitimacy setting RU apart from other activists. For Reilly, professionalization was key to working with members in a constituency that was mostly wealthy, white, "recovering Republican" housewives. She complained that at a rally organized by RU when Trump came to town, two people affiliated with Antifa—a name standing for "Anti-Fascist," associated with an ideological commitment to civil disobedience rather than affiliation with a formal organization—attended and made the event appear less professional and more "scrappy." This staff member would not engage at all with such unprofessional activists: "It's not my job as an organizer," she quipped, "to say 'suburban trophy wife, meet Antifa; Antifa, meet suburban trophy wife." For this staff member in particular, professionalization was a marker of legitimacy necessary for working with the members of her relatively moderate and highly affluent constituency.

Professionalization extends beyond the formalization of National leaders as paid staff to substantively shape the goals of the organization and the roles enacted by staff; in doing so, professionalization (re)produces a focus on transactional repertoires. A professional organization necessarily involves a secondary goal of sustaining the organization itself. A major part of sustaining a political advocacy organization like RU is raising funds to cover payroll and expenses, including funds from major philanthropic donors and grants. Those donors and grantmakers require the organization to demonstrate efficacy, often in the form of quantifiable results. Staff members thus become responsible for demonstrating quantifiable outcomes in order to sustain the organization, and their roles are shaped by this secondary

goal in addition to the primary goal of engaging in political work. This further (re)produces the pull of transactional repertoires.

By the end of 2018, RU had onboarded as staff several members who had begun their involvement as grassroots leaders. These members, in their process of negotiating their new roles, had to navigate the professionalized structures of National, and their experiences provide an interesting inside-outside comparison. In an interview with one of these grassroots-turned-staff members, she shared with me the challenges of this negotiation, suggesting that professionalization was a major element of her role negotiation and the process of becoming a professional marked a critical incident in the course of her membership. Natalie shared that early on in her time as a staff member, she helped a local group (the group she had been a member of prior to becoming staff) plan an event focused on visibility and connecting to the local community; however, the event she planned did not have a clear quantifiable outcome:

> Basically, I got told that this whole weekend was a waste of a weekend because it wasn't a direct voter contact thing. We ended up doing a [text bank] to kind of quote-unquote 'save the weekend.' But, I'm just sitting here like, that's not how I viewed it. And, so if it's just about numbers, then that's really a disconnect… In my sense, being on the ground and knowing people out here, and being born and raised here, to have that connection, you could have that relational conversation, you could have that one-on-one with a person and then you're gonna gain a volunteer, you're gonna gain a contact. You know what I mean? Instead of just being like 'Oh, yeah we're calling you to see who you vote for.'

In this narrative, Natalie felt the tension between transactional and transformational repertoires. Whereas in her role as a group member she would have managed the tension from a both-and perspective, recognizing the interdependence of the repertoires, in her role as a staff member she felt pushed to take an either-or approach, choosing only the transactional repertoire that enabled a quantifiable outcome.

Professionalization reifies the distinction between grassroots members and National staff. The grassroots are non-professional volunteer members, while staff are professionals. While grassroots membership is legitimized by *doing* and *being*, National staff are legitimized by professional status. The perceived legitimacy of professional status imbues National staff with a form of power that is inaccessible to the grassroots. That power may be exerted in ways that give National staff greater constitutive power in the organization, calling into question the foundational motto of "we aren't the leaders of this movement—you are."

By constructing professionalism as a marker of legitimacy and creating a distinction between National and grassroots leaderships, professionalization can have the unintended consequence of delegitimizing grassroots leadership. Grassroots members' skills and expertise can be marginalized and potential left untapped. A common complaint of grassroots members was that their member bases had so much expertise (drawn from both their growing organizing experience and their professional lives in non-organizing capacities), but that expertise was unharnessed or untapped. Some organizing staff, too, recognized that this was a problem. Lindsey, an OT staff member explained how the skills and expertise of her local groups could have helped fill gaps in the resources available to National, but were still left untapped: "[We tell groups] if you want this graphic, sorry, we have to make all our graphics the same template, because we don't have a team of designers or professionals that could

take special requests on what their literature looks like. But, [another organizer] and I have always been saying, 'But we have—just in [our state] alone, I could identify 10 people that graphic design is their profession!' I'm sure you multiple that by times ten, at least, nationwide. [We're not] really figuring out the strengths of the people in our movement and utilizing them to the best capacity we can. I think we can be doing a lot more with a lot of these folks." The reason for this untapped potential was that members with such skills and expertise lacked the key marker of legitimacy: professionalization.

By legitimizing professional leadership, RU may unintentionally delegitimize volunteer leadership and leaves untapped a trove of expertise and resources that might otherwise be beneficial to the organization's goals. RU National also ironically undermines their founding statement of "We aren't the leaders of this movement—you are," as National as situated as more legitimate leaders than the grassroots. The transactional-transformational tension is approach through an either-or privileging of transactional repertoires that (re)produce and are (re)produced by professionalization. Professionalization also heightens the tension between National and grassroots leadership and contributes to legitimizing the National pole of the leadership tension while unintentionally delegitimizing the grassroots pole. The impact of the power imbalance between the grassroots and National will be discussed at length in subsequent sections of this chapter.

### *B. Repertoires and their Influence on Reflexive Self-Structuring*

Self-structuring occurred to support both large-scale member mobilization and long-term membership sustainability—in other words, responding to both poles of the transactional-transformational tension. However, a pull toward transactional logics early on has had a long-term impact on organizational structuring over time. The pull toward

transactional repertoires like rallies and protests was strengthened by the emphasis on mobilization presented by the original *Guide*, by the urgency of the political issues on which RU was focused, and by the trend toward professionalization at the National level. Members discursively positioned transactional and transformational repertoires in opposition when reflexively structuring the organization, approaching the tension from an either-or perspective; they did not feel they had the time or energy to focus on both, and the urgency of the moment called for large-scale, transactional protests to demonstrate strong opposition to unfolding policies like immigration restrictions and health care cuts. However, a more-than approach to the tension manifested in the way deep transformational relationships (many of which were the unanticipated consequence of engaging together in transactional mobilization) shaped the development of leadership structures. That is, as members took on the daunting task of standing up to an onslaught of harsh new policies, the work they did together helped cultivate relationships that would endure over time and shape their participation in the long term.

Founders of the National organization set out to prioritize sustainability as well as rapid escalation, intending to take a both-and approach. As one founder, Amy, told me:

> We built the original strategy for the organization in the summer of 2017. It was really about formalizing a set of possible goals around foiling the Trump administration's major priorities. Electoral goals around setting the stage for a strong 2018. And movement goals around making sure that we were supporting and sustaining a a powerful movement on a local level that was independent and um effective and sustainable.

Amy explains that the strategy was to prioritize both transactional electoral goals and transformational movement-building goals.

Yet the first year of the organization was so occupied with responding to the immediate needs of mushrooming local groups that many structures reflected a transactional approach, with the goal of providing information to local groups in exchange for those groups' involvement. As groups formalized, they sought out guidance from the Guide's authors who, in response to group leaders' needs, began formalizing a national structure in early 2017. The National structure, then, was formalized largely in response to the urgency of the grassroots groups' structuring process. Several authors of the Guide shared a similar narrative of reactivity. Amy, again, summarized the process, sharing that once the *Guide* was published, "there were a ton more questions that were coming up for people who had started these unincorporated volunteer communities dedicated to action all over the country than we had the capacity to handle, respond to, or offer value to in our spare time. Within… three weeks of this it was clear we were gonna need to formalize in some sort of way in order to just continue responding." The urgency of the structuring process gave rise to formal structures that were designed from a reactive position; this had impliations, discussed below, for how the transactional-transformational tension was managed.

1. The Strong Pull of Transactional Repertoires.

Grassroots and National structures both emerged as group leaders set out to engage in political action opposing the Trump agenda. Transactional repertoires pulled hard early on as RU members mobilized in response to the rapid onslaught of policies introduced by Trump in the early days of his administration, including policies relating to immigration, taxation, transgender rights, and so on. Members commented that early on, they were simply trying to

"put out fires," which popped up more quickly than they could be addressed. Putting out those fires required all hands on deck, mobilizing as many people as possible as rapidly as possible, strengthening the pull toward transactional repertoires that had already been established by the Guide. As Craig told me, "There was so much shit flying, going down, coming out of the White House, where they needed to react and mobilize in those moments of crisis, but we're never able to—to that point—begin thinking of okay, what's our longer term, i.e. six months? How are all these actions and things that we're doing building towards that?" It was not until the fall of 2017, when RU began planning the Regional Institutes, that staff were able to begin concertedly envisioning deeper organizing work, and even then the focus was on a scale of months or, at most, the year between the first Institute in October 2017 and the upcoming midterm elections in November 2018.

As organization emerged from the network and members began planning for longer-term engagement, focus shifted to incorporate attempts at building out structures that would enable organizational sustainability. Sustainability often involves transformational repertoires, and the Regional Institutes, according to Craig, were a key site to negotiate the introduction of structures rooted in those logics. For example, developing relationships for sustainable involvement was one focus of the Institutes; this focus strengthened as time went on and by February of 2018, training modules were introduced that focused more heavily on recruitment and relationship development, distributed leadership to prevent burnout, and celebration as a way of nurturing long-term involvement. Some of these modules took both-and approaches to the transactional-transformational tension. For example, the module about recruiting and building relationships with new members was framed around both increasing a group's capacity through transactional repertoires (getting people in the door) and improving

prospects for sustainability through transformational repertoires (building relationships to keep people invested).

A key challenge to approaching the transactional-transformational tension from both-and or more-than perspectives was professionalization. Just as professionalization shaped members' negotiation of their roles, so too did it shape the (re)production of structure. And though grassroots groups remained non-professionalized and volunteer-led, National's role as a guiding structure for the grassroots groups led to a trickle-down effect in terms of professionalizing the definition and metrics of what "counts."

Professional activities such as philanthropic fundraising and demonstrating concrete outcomes to donors involves tracking outcomes, and transactional outcomes are easier to track than transformational ones. This resulted in members—especially National staff, and through a trickle-down effect some volunteers who worked closely with staff—making meaning around what sorts of actions "count"—literally emphasizing the types of actions that could be numerically represented. These types of actions included number of phone calls made, number of rallies held on a day of action, and number of voters registered using RU's voter registration system. Structures were (re)produced with a focus on facilitating the work that "counts." Since quantifiable actions fall heavily into the repertoire of transactional mobilizing, this meant that self-structuring was shaped by a stronger pull toward transactional repertoire.

In interviews, three members of the OT explained to me the challenges arising from professionalization, all of them focusing on the drive toward quantifiable outcomes. As Lindsey explained:

> You want the numbers because you want donors! You need your donors for the organization, and so you have to show your donors these things and we were saying like, 'Oh, you know, [this state] had 500 events,' [which] looks better than [this state] had 64 events. But like, what you didn't realize is that the 64 events all had 400+ people at them because it was a whole district and all the groups in one district joined in together. How do you make that—how do you translate that on paper?

Another staff member, Taylor, explicitly labeled the situation "paradoxical." He suggested that instead of (re)producing structures that would facilitate the types of activities that appealed to donors, RU should engage in the types of activities that members deteremined to be most effective, and those would naturally appeal to donors. As Natalie emphasized, however, RU did not necessarily do that—instead, the focus on donors was prioritized. Some activities that members engaged in, such as a local Pride parade, were deemed as "not counting" by National, and were therefore discouraged.

Considering recruitment and retention, which was framed at RI trainings in terms of a both-and approach to the tension, success looks different when framed through a professionalized model. In a professonalized model focusing on quantifiable outcomes, the success of recruitment and retention is represented in terms of how many new members are recruited and how many members remain involved in a group. Indeed, success in the training modules was weighed by how many "yes" answers a participant received during the practice session. Yet these metrics flatten and erase the depth and quality of relationships that are built. Those deep relationships can mean the difference between sustainable organizing and fragmentation, as illustrated by Isabel and Krista's groups. Both of those groups build deep

relationships among members, spending time together informally in addition to engaging in more formal organizing activities (discussed further in RQ2). The relationships among members were key to long-term involvement for those groups. However, measuring deep relationships rooted in transformational repertoires is difficult or impossible to quantify, and professional models emphasize the quantity rather than the quality of relationships. Metrics were constructed around an either-or approach to the transactional-transformational tension, privileging quantifiable transactional outcomes as a measurement of success.

The influence of the transactional-transformational tension on reflexive self-structuring will be broken down and disucssed in relation to formal, informal, and hybrid structures in RQ2 below. In short, I found that formal structures were (re)produced mainly as participants took either-or approaches to the tension between repertoires, and in turn shaped either-or responses. Infromal structures incorporated both-and approaches, but were (re)produced as subordinate to formal structures; this resulted in the subordination of transformational repertoires and in a form of hybridity that was weighted more heavily toward formal than informal structures.

### C. The Transactional-Transformational Tension and the Reproduction of Formal, Informal, and Hybrid Structures

The second set of research questions asked about how the transactional-transformational tension related to the reproduction of (a) formal, (b) informal, and (c) hybrid structures. The goal of this question was to better understand how the tension between repertoires resulted in the (re)production of structures that in turn shape ongoing negotiation of that tension. I found that as members negotiate the transactional-transformational tension, they (re)produce structures that can reflect some of the ways the tension is managed and

subsequently (re)produce the tension. Data suggests that formal structures are shaped significantly by either-or approaches to the tension, and formal structures also contribute to (re)producing either-or responses. Informal structures can be incorporated for both-and approaches. The combination of formal and informal structures (re)produces hybridity. However, informal structures tend to be (re)produced as subordinate components of formal structures. Hybridity is thus weighted toward formal structures, with implications for how tensions are managed. I discuss this in greater depth in the following sections.

1. (Re)production of Formal Structures.

As discussed in RQ1B, members discursively positioned transactional and transformational repertoires in opposition as they structured the organization, and members felt a strong pull toward the transactional end of the pole due to the urgency of the political environment in which they were operating. The urgency of the political environment drove the formalization of grassroots groups' structures, resulting in formal structures that were heavily underpinned by transactional logics. Those structures, in turn, contribute to (re)producing a strong pull by the transactional pole of the transactional-transformational tension. Transformational logics shaped formal structures mainly in the context of political education and anti-oppression training.

RU began as a hybrid structure that triggered the rapid emergence of informal structures, which members subsequently organized into formal and hybrid structures. The *Guide* represented a hybrid form, combining some formal structure in the form of best practices with a great deal of informal structure, in that it left up to users of the Guide how those best practices would be put to use. Early groups formed around the Guide were largely informal and ad-hoc—some even emerged from pre-existing informal structures like social

friend groups or networks of colleagues. However, to take political action in the context of a rapidly approaching inauguration and, subsequently, in response to the onslaught of legislation and presidential orders, groups needed to be able to coordinate quickly and efficiently.

Groups began to formalize within weeks of emerging, building out leadership and decision-making structures. A wide array of structures emerged in the groups: some elected leadership boards or bureaucratic positions like "president" and "vice president"; others functioned using consensus, formalizing democratic leadership. Though some remained informal and ad-hoc for longer than others, run by whomever was present and taking action without formally identifying leaders, data suggests that the groups that endured built out some sort of formal or semi-formal structure. I did not encounter any operational groups during fieldwork that claimed to operate using fully informal structures. A couple of group leaders at the Regional Institutes did say that they had not yet built out formal structures in their groups. However, these did not seem to be operational in that they did not have a membership base capable of taking the sorts of actions recommended by the *Guide*; rather, the group leaders who were present at the Institutes were trying to establish structures in order to build groups.

One group leader, Lilly, shared how her group had formalized and shifted from an "everything is on fire" mentality to one of greater circumspection:

> I would say now, compared to when we first started, I think we are much more—I think we have a much tighter focus. And I think we're more careful about where we put our energies. So before, I think there was a lot of 'oh my god, everything is on fire' and 'we need to do something about everything.'

> And I think we now realize, well, we're much more circumspect about, 'okay well is this something that any of our reps or either of our senators are actually involved in. And, and we've also taken on a lot of work with doing state ledge work as well.

Lilly's comments illustrate how early on, the chaos of the political context contributed to a sense of overwhelm. Over time, as formal structures emerged, members were able to exercise greater care and consideration in the decision-making process and prioritize issues on which they could truly have an impact.

As discussed in RQ1B, founders of the Guide set out to take a both-and approach to the transactional-transformational tension, but faced pressures from the political environment as well as from the scale of the budding grassroots groups. The incredible scale of grassroots involvement put significant pressure on staff members early on, and it was simply not possible to prioritize everything at once. To identify priorities, National conducted a "Listening Tour" in the summer of 2017 during which staff members reached out to group leaders to identify groups' needs, helping shape the development of structure based on those priorities. Findings of the Listening Tour, which were presented at the October 2017 Regional Institute, included identifying groups' desires for training on building structure, leadership development, supporting political campaigns (and the legal requirements involved), and working with a diverse and multi-racial coalition. These priorities drew on both transactional and transformational repertoires and shaped the subsequent development of structure.

To respond to groups' emerging needs such as access to resources, ability to leverage power in local electoral politics, and efficient coordination of voter outreach, RU built out

formal structures rooted in transactional logics that included distributed fundraising (made available to groups beginning in early 2018), endorsement procedures (also beginning in early 2018), and access to the Voter Activation Network (VAN) (a plan that was in the works starting in late 2017 but implemented beginning in mid-2018). Each of these structures required a professionalized model due to the legal implications of participating in electoral activity, and thereby (re)produced the pull of transactional logics on members.

Transformational repertoires were employed largely to facilitate transactional activities, rather than for the sake of themselves; this occurred in two ways. First, RU attempted to incorporate formal structures to facilitate relationship development and leadership development necessary for long-term sustainability; since relationship and leadership development practices typically involved some degree of informal structures, they will be discussed below in the section on hybridity. Second, formal structures were (re)produced to facilitate political education (rooted in transformational logics), specifically relating to anti-oppression as a progressive value. This related directly to groups' expressed desires for training and education around participating in a multi-racial coalition in order to increase capacity (thus serving a transactional function).

Though anti-oppresion training was highly valued by organizational members and clearly rooted in transformational logics, the bulk of RU's work focused on transactional mobilizing to push back against Trump's political agenda. As groups adopted formal structures developed by National to do this, such as distributed fundraising, endorsements, and VAN, they too developed a stronger reliance on the transactional repertoires guiding the increasingly professionalized model of RU. The reliance on transactional repertoires and professionalization made it difficult for both National and local groups to deliberately take

both-and or more-than approaches to the transactional-transformational tension; in other words, formal structures constrained members' approaches to this tension.

Darin, an OT staff member, discussed the challenge in terms of needing to adapt from an early, transactionally rooted model to incorporate more deep, sustainable organizing. Darin said in October of 2018:

> In a very real way RU at its beginning and through so much of its early history was a mobilization organization. We gave you [group members] the information, you went out and visited Congressmen or you made phone calls to their offices. It was about mobilization. And I think now the way that we need to adapt is that we need to be an organization that not only resources the groups on the ground but, you know, does the deep organizing that I was talking about at the beginning, to really empower these groups, to build highly structured, highly adaptable, highly responsive local groups that can create plans to influence their local and statewide politics in a way that's beneficial to them and the constituents around them. I guess in a nutshell, what I could say is the way that we need to adapt is, you know, RU needs to become an organization that starts considering long-term planning, and this pivotal moment is about whether or not we're gonna be here in five years.

Darin identified the need, a year and a half into the organization's existene, to begin considering long-term planning. However, other participants commented on how difficult it was to shift the trajectory that had already been set. As Craig commented, adapting to more sustainable organizing may be easier said than done. "There were some innate challenges," Craig said, when it came to moving from a transactional mobilizing framework to one rooted

in transformational organizing. Primarily, the organization had been "bred out of the resistance movement to Trump. Quickly, I think early on, they captured all of these people and that energy. The culture of RU early on was set up to do just that, to resist and to give people tools that allowed them to do that. So I think making the shift from mobilizing to organizing became more and more [difficult]."

Craig's analysis is reflected in the experiences of grassroots group leaders. Maureen described how, early on, hundreds of people attended her group's meetings. They quickly worked to build out transactional mobilization structures such as a steering committee, voting procedures including quorum, a code of conduct, and more. However, very little transformational relationship building was done, and without ties to hold group members together, the overwhelming majority dropped off. Two years later, there were around ten active members, and the structures they had built were no longer useful. Reflecting on that structure, she mused, "one of the things that's missing from the structure that I think is so problematic for us and we're really dealing with now is we have all these structures for operating procedures, but we actually don't have a lot of clarity on what the focus of the organization is about." Maureen also identified a mobilization-oriented mindset and difficulty implementing deep organizing practices. In her group, building structure to enable large-scale mobilization came at the expense of relationship building and collective visioning (in other words, members took an either-or approach), and it became difficult, later, to reorient toward a both-and approach. As of May 2019, Maureen was working to implement deep organizing practices, but finding it challenging due to the structures that were already in place. Her story is in line with Blee's (2012) findings that the early formation stages of an activist group have long-term consequences for its future.

To summarize, it was common in RU for structures that were initially informal to be (re)produced as formal structures in order to coordinate efficiently. Local group leaderships became formalized, often formalizing those who had already been informally functioning as leaders. National leadership, too, formalized, in many cases with the hiring of key individuals who had previously been working informally (e.g. authors of the Guide). At the National level, formalization also included professionalization. This formalization process, responding to the pressing needs to engage in large-scale mobilization to combat the onslaught of Trump's policies, reflected a strong pull toward transactional repertoires. This pull was strengthened by the professionalized model adopted by National, which was more suited to formal structures than infomral ones because formal structures enable the quantifiable tracking of outcomes that is key to professionalized politics. Through the OT, the professionalized logics of National filtered down to some of the grassroots groups as well. Thus the transactional-transformational tension—and specifically, the pull toward the transactional pole—was managed in such a way as to (re)produce formal structures rooted in transactional logics and even to discourage informal structures. This created challenges in 2018 and 2019 as RU groups sought to further incorporate transformational repertoires in pursuit of long-term sustainability.

2. (Re)production of Informal Structures.

Though the structurational process of RU involved a shift toward formal structures, informal structures persisted in two ways: first, in the form of relationships among members, and second, as sub-structures operating as components of formal structures. In the case of informal structures operating as sub-structures, the combination of formal and informal constituted hybridity and will be discussed in the next section. This section will focus on

informal structures in the form of relationships among members. These are informal in that the relationships would not be visible on an organizational chart, but represent friendships and solidarity relationships among networks of members both within and between groups as well as within and between levels of leadership. These informal structures emerged through transformational processes occurring at the interpersonal level, by which relational bonds emerged and solidified. Interestingly, however, those processes frequently occurred in the context of activity that was rooted in transactional logics.

Though intentional deep relationship development is rooted in transformational logics, in RU, many of the most close-knit relationships reported to me by members emerged through a process of working together on activities that were rooted in transactional logics. In other words, the deep relationships that formed were in fact an unanticipated consequence of transactional work. This was found in relationships both among group members and between group members and National staff. For example, in the early weeks of groups' emergence, group leaders worked with *Guide* authors (many of whom would later become National staff) to coordiante activity. One such instance invovled group leaders in one of the very first RU groups who happened to live in the district of a Member of Congress who held a key position on the Congressional Ethics Committee, the site of a January 2017 initiative to roll back Congressional ethics guidelines. One of the *Guide* authors phoned a group leader who had entered her contact information in the group registration form, and the authors provided support to that leader and her group to hold an action at their MOC's office. The relationships built during those days of planning endured in subsequent months and years, and the leader who took that first phone call became one of the most highly involved group

leaders nationwide. Relationships such as this one resulted in transformational bonds, but were an unintended outcome of transactional repertoires.

Though most groups did not develop relationships with the Guide authors early on (there were far too many groups for the authors to contact them all, so they focused on those in key districts), relationships did build among group members as they organized together in the early months of 2017. These early relationship bonds had a strong influence on leadership development. Many group leaders report developing close relational ties with fellow leaders and members of their groups. One shared that “we do all of this work together, and it has become very meaningful but we have also become very, very close friends. So, you know, Alexa and I vacation together with our kids. That kind of thing” (Isabel). This member went on to say that those deep relationships were key for maintaining her involvement, and she could not imagine being involved to the same degree if she did not have her friends to lean on. Many other members echoed similar sentiments. At the Regional Institutes, I frequently observed members who regsistered and attended together speaking as close friends and confidantes, and thus believe such close relationships to be extremely common among group members. During discussions about sustainability and what keeps members coming back, close personal relationships and a sense of community were the most common ideas raised. Thus, informal relational structures enable participants to remain involved through long-term political struggles and the burnout that can result. They are unique to local groups and can vary greatly between groups.

As identified by group members themselves—in line with most common understandings of grassroots orgnaizing—informal relationship ties keep members involved in the long-term. Conversely, group members with fewer ties may drop off as members (or

do not become leaders). Reports of members dropping off due to fewer ties typically came from members who were still involved as they attempted to make sense of attrition rates in their groups, and therefore are difficult to confirm. However, informal relationships among members were a major point of discussion during training sessions on sustainability, with consensus existing in those discussions about the importance of relational ties. This suggests an overwhelming agreement among members that involvement and participation in RU was facilitated by informal relationships.

Again, it is important to note that many of the close relational ties driving leadership development were cultivated through mutual engagement in transactional mobilizing. As members worked together to "put out fires," relationships formed as an unanticipated benefit. Thus, while some members discursively positioned transactional and transformational repertoires in an either-or opposition when reflexively structuring the organization, in the context of relationships and leadership development, the repertoires functioned together in a both-and relationship. For groups that recognized this both-and approach, transactional relationship building could be easily build into transactional mobilization activities such as writing postcards. Landon, a member of a large RU group, explained in July of 2018 that even a year and a half into the group's existence, using transactional activities to facilitate transformational relationships was key to his group's sustainability. He shared:

> Well, there's a joke in IEB that post carding is a gateway drug, so what you do is, you have to find a good place to post card where people can take their time doing post cards and have time to chat and make new friends to their left and right. And then, we believe, IEB believes, there's more in common than differences, and then we find that as they have opportunities to either phone

> bank, post card, letter writing, canvassing, we give them enough time to socialize with the other volunteers, and they become friends. And so, what happens is the friends and much like you have a work out partner in the gym, you are more liable to come back when you know someone is coming back that you had met. So that's how we get a decent amount of return customers that way. I couldn't give you a number, but we always can add a couple of new ones every time with our regulars.

Interestingly, Landon's description of relationship development was not in line with the formal structures implemented by RU National to facilitate relationship development. RU National trained leaders at the Regional Institutes on practices such as "one-on-one conversations," a common tool in organizing. During one-on-ones, an organizer meets with a new member and has a semi-structured conversation to identified shared values, interests, and other discursive resources that can be used to keep that new member engaged. One-on-one practice sessions are frequently challenging and even stilted, with participants commenting on the inorganic feeling of the conversation. In practice, it may be more common for relationships to develop more organically. While two group leaders did explicitly mention the use of one-on-one conversations to me, it was far more common for leaders to report practices that were more in line with what Landon or Isabel identified.

The informal relational structures among members also contribute to members' ability to shape organizational structure in meaningful ways. It was common for leaders to choose whom to develop as leaders based on informal relational ties. For example, Jess, a staff organizer, reported developing a relationship with Crystal, a group leader, early on and identifying Kim as someone she wished to elevate as a leader; she did so, helping to hire

Crystal on as a new organizing team staff member in 2018. In fact, all three group leaders who shifted roles from volunteers to staff members were people who had close ties to National staff, suggesting that relational ties are an important source of power. Those with relational ties are elevated to positions of greater power and can play a stronger role in subsequent organizational development.

Informal relationships among staff and between staff and a few espeically involved group leaders were (re)produced and strengthend by interaction at the Regional Institutes and provided opportunities for group leaders to have more substantive influence in RU. National staff members—especially OT staff—enjoyed spending time together, and since many worked from different parts of the country and saw each other infrequently, took the opportunity presented by the Regional Institutes to spend time together and with a few group leaders with whom they had already developed relationships. These relationships benefited the highly involved group leaders, and further strengthened their involvement.  Several local group leaders referred to each other and their staff organizer friends as "family."

Due to the unevenness of relational ties between National staff and group leaders, informal relationship structures also posed challenges. Informal relationship structures among National staff members created a barrier to informal communication between National staff and grassroots leaders at the Regional Institutes. The time that National staff and a few key group leaders spent together was beneficial for those relationships, but also meant time *not* spent interacting with unfamiliar group leaders and building new relationships. At two different events, group leaders commented to me that they felt National staff were too busy socializing among themselves to interact with the group leaders with whom staff were "supposed" to be spending their time. During lunch at the Portland institute

in June 2018, one group leader (who had attended multiple Regional Institutes and state summits) indicated the table where National staff were all sitting and commented, "This is how it always is at these things." The physical separation of lunch tables, to this member, represented a manifestation of the gulf between National staff and group leaders. At two other field sites, some National staff made announcements on the first day reminding other staff to deliberately spend time mingling with group leaders in order to foster relationship development. However, separation still occurred.

To summarize, informal relationships emerged through working together. The activities through which they emerged were often rooted in transactional logics, with transformational relationship development emerging as an unanticipate consequence. Because relationship structures were distributed unevely, members enjoyed different benefits and challenges. Some members enjoyed greater structurational power and sustained involvement in the organization as a result of relationships, while others left their groups or remained in their groups but felt a sense of alienation from National. The decline in informal relationship development between National staff and local group leaders following early relationship formation suggested a transactional nature to the relationship between National staff and most group leaders, rather than a sustained focus on intentional transformational relationship building across levels of leadership. By shaping interactions that privileged existing relationshps, informal relational structures were self-reproducing, but limited.

3. (Re)production of Hybrid Structures.

Hybridity involves the use of multiple structures or logics in combination. Hybridity can involve structures that include formal and informal elements, and/or structures that involve transactional and transformational logics. In RU, hybridity was constituted through

the persistence of informal structures in the form of sub-structures or components of formal structures. This type of hybridity is termed by RU as “aligned decentralization.” Aligned decentralization involves the interaction of multiple leaderships with varying degrees of formality. These leaderships (re)produce hybridity as they reflexively (re)produce structures for coordination. This can involve formalizing informal relationships. The ultimate purpose of hybridity is rooted in transactional logics of maximizing participation; transformational logics serve a utilitarian purpose in enabling large-scale transactional work.

RU employs a strategy they call “aligned decentralization.” This strategy brings together formal structures to enable alignment with informal structures to support decentralization. Alignment occurs in the form of broad-based goals and vision (discussed in RQ1), an overarching strategy of building and exerting power at the local level (including Congressional districts and state legislatures), and a large toolbox of resources and expertise made available to members. Decentralization involves the ability of local groups to adopt their own specific goals (in alignment with the broad-based organizational vision), emphasis on activity occurring at the local level by constituents in their own districts, and the use of tools by local groups at their own discretion (with available guidance by National).

Decentralized groups maintained alignment by drawing on RU’s founding principles as laid out in the Guide. Group leaders encouraged other members to consider whether particular goals or actions were in alignment with those principles, and if they were not, groups tended not to take them on. One group leader at the April 2018 Houston Institute (Krista) described functioning as a sort of clearinghouse for ideas brought to her by other group members. If those ideas were not in line with RU’s guiding principles, she would suggest other local organizations that may be a better fit for implementin the idea, and direct

the group member to contacts there. A fellow group member agreed with her: “That’s how we’ve been effective—consulting the Guide. We’re laser focused, mission focused. It’s the Guide.”

Another group leader at the June 2018 Minneapolis Institute, during a discussion about whether or not to support local candidates, drew her fellow group leaders’ attention back to a guiding RU principle set forth in RU’s training of supporting candidates who will become progressive champions. “We need to really focus on who can become leaders,” she said. Data suggested it was common for group leaders to draw on RU’s guiding principles, as laid out in the Guide or other resources (such as endorsement guides) when making decisions, contributing to alignment.

Aligned decentralization drove the training model implemented at the Regional Institutes. There, group leaders were trained on strategies and tactics constituting alignment with the goal of applying those strategies and tactics in groups across the decentralized network of groups. As Adam, a staff organizer put it during a plenary session at the June 2018 Minneapolis training, “If you’re Marcus, you’ll drive a Buick. Me, it’ll be any SUV I have in my driveway. Scott’s going to drive his Prius. It all depends on the local group and what you have in your driveway.” This metaphor was used to illustrate how different groups will use different tactics to accomplish their goals, depending on the particular situation in that district. While all groups should have access to the tools necessary for implementing a wide array of tactics (alignment), the decisions about which tactics to use in order to accomplish locally-determined goals are made by local groups (decentralization).

4. (Re)producing Hybridity at the Local Level.

Aligned decentralization also describes the group-level structural model that National encourages local groups to adopt, including through trainings at the RIs on organizational structure. The structure advocated by National, and presented at Regional Institute trainings, is called the "snowflake model." The snowflake model enables transactional mobilizing by distributing tasks among members who constitute branches of the snowflake. Each branch is responsible for different tasks (like volunteer recruitment, social media outreach, liaising with politicians, and more depending on groups' needs). To empower decisionmaking and activity distributed across the branches of the snowflake, groups develop leaders who support those activities. The primary function of the snowflake model is to enable transactional mobilizing, but operating using the snowflake model requires transformational organizing because it relies on distributed, informal leadership, thus requiring that members engage in the transformational process of leadership development. Leaders within a snowflake model are also heavily interdependent, requiring transformational relationship building. Thus, the snowflake model represents a both-and approach.

Hybridity is also (re)produced through the formalization of informal relationships. This practice, reported by some group leaders, allowed members to link their informal relationships to their formal organizing responsibilities. As one group leader (Krista) shared, she formed the center node of a snowflake consisting of twenty leaders in three neighboring counties. Those twenty leaders met every month over breakfast. "We have a little bit of an agenda but when we break bread together it's like a family, and that's intentional. It's like a fellowship thing." The monthly meeting was formalized in that it was routine, explicit, and planned, but the content of the meeting was informal and relational, constituting a hybrid structure. This hybrid structure was rooted in transformational logics of deep relationship

building, and it enabled that group to persist through the serious challenges of doing progressive organizing in a deep red area.

The snowflake model incorporates both transactional and transformational repertoires for a both-and approach. Transactional logics are used to directly address groups' goals of progressive political change through local political mobilization. Transactional mobilization was enabled by transformational organizing, which enabled groups to develop deep and sustained relationships, building community that helped maintain members' commitment and involvement.

(Re)production of hybrid structures will be discussed in greater depth in RQ3.

### D. The Leadership Tension and Hybridity in Membership Negotiation

RQ3A asked about how the tension between multiple leaderships influenced hybridity in the membership negotiation flow. Aligned decentralization involves multidimensional constitutions of membership, including National and local group members. Since the leadership groups mutually constitute the organization by playing complementary roles, their roles are constituted relative to the other leadership groups, and membership is likely negotiated not only in terms of the leadership group to which a member belongs but also in terms of the *other* leadership group. Many of these members are also leaders representing various points on the formal-informal spectrum and, together, constitute *hybrid* leadership in RU. The ways in which hybridity is constituted would logically be influenced by the tension between the constitutive leadership groups.

Negotiations of leadership are prominent in my data, as most participants in this study held some type of formal or informal leadership role. Data pertaining to membership negotiation therefore centered on negotiations of leadership; taking the lead from my data, I

focus my findings in this section on leadership negotiation, with discussion at the end of the section about how leadership negotiations may influence non-leader members at the local level.

National and local leaders must negotiate their roles relative to one another in the hybrid leadership structure, and this negotiation process is substantively shaped by the tension between the leaderships. Though there is some convergence in meaning around the roles occupied by the different leaderships, there is also significant divergence, resulting in conflict. Critical incidents suggest that when there is convergence, the tension between leaderships can be generative and useful in constituting membership; however, when there is divergence, the tension between leaderships is a source of conflict.

Data suggests there is some degree of convergence in terms of how the multiple leaderships understand their roles in the organization, but also some divergence in meaning. By convergence, I mean the different leaderships agree about a particular construction of member roles; by divergence, I mean there is substantive disagreement or contestation about role construction. I identified convergence when participants in both field observation and interviews articulated roles similarly and expressed agreement as other articulated them; I identified divergence when participants resisted or disagreed with articulations of certain roles. Disagreement typically had to do with how the *other* leadership group negotiated their role—such as grassroots leaders contesting the way National staff articulated National's role.

1. Overview of Leadership Categories.

National leadership is by definition formalized: National leaders are easily defined based on who is on payroll and can be identified on an organizational chart, though that chart was constantly in flux during the period of my research. As discussed above, National

leadership became more clearly formalized over time as particular roles became more specialized. In October 2017, staff members reported that though they had jobs on particular teams (such as the political team, the communications team, and the organizing team), there was still a great deal of overlap in terms of tasks. By the conclusion of data collection for this project eighteen months later, roles were much more clearly defined and less overlap existed.

A distinct group within the National leadership structure is the Organizing Team (OT). Though OT staff are members of the National leadership, their day-to-day responsibilities place them in close communication with group leaders, and they sometimes spend more time working directly with group leaders than they do interacting with fellow National staff. They are the main point of contact for local leaders seeking to engage with National, and are responsible for directly responding to local groups' needs. The OT therefore occupies a liminal space at the threshold between the formal bureaucracy of National and the distributed network of the local groups. This liminality places the OT in a critical position to contribute to negotiations of various tensions, including the tension between multiple leaderships, which will be discussed in greater depth below.

Local leadership is less clearly defined than National. Local leaders may fall on a spectrum from formal to informal, depending on a group's local structure. Some groups elect formal volunteer leaders who, while not on payroll or professionalized, are clearly delineate as "board members," "president," "vice president," or other titles as determined by the group. Other groups are organized based on democratic decision-making, consensus, or other forms that are not as clearly formalized. (Some of the differences between local group structures and their implications for formal and informal leadership to work together in local contexts are discussed in greater depth in RQ4A.)

By bringing together multiple leadership groups, including National and grassroots, RU exemplifies *hybrid leadership*. Hybrid leadership requires that various leadership groups negotiate their roles relative to one another. In many ways, the leaderships operate synergistically: neither National nor the local groups can operate without the other. National, without the local groups, would have little influence over the politicians who are concerned primarily with re-election and thus most susceptible to influence at the local level. The grassroots groups, without National, would have little access to resources necessary to exert pressure on their government representatives, or to the training needed by first-time activists to develop the skills and expertise necessary for exerting that pressure.

While National and local leaderships are both necessary for RU to function, the process of negotiating the relationship between them is complex; roles of National and the grassroots are interdependent and must be negotiated relative to one another. As they negotiate their roles, meaning converges and diverges, resulting in outcomes that can be generative or conflictual.

2. Convergence.

Meaning converged around articulations of grassroots membership as (1) providing the broad base of grassroots people power rooted in local Congressional districts; (2) as developing local structure and governing local groups; and (3) helping to set the agenda for the National organization. Meaning converged around National's role as (1) liaising with Members of Congress and their staffs; (2) providing resources necessary for groups to exert their people power, including material resources and expertise; and (3) responding to groups' needs and agendas. These articulations of leaderships roles align and complement one another and contribute to (re)producing hybridity.

Each area of convergence contributed to (re)producing hybridity in the membership negotiations flow. First, the local memberships' role of providing grassroots people power goes hand in hand with National's role of liaising with MOCs to constitute an *inside-outside* strategy. Inside-outside strategies are used by advocacy groups to pair inside influence in DC with power exerted in Congressional districts. The influence available to Congressional liaisons is only as strong as the influence exerted by voters in the Districts—this was a point heavily emphasized by RU's memberships, and suggests complementary roles of the different membership groups.

Second, local memberships' role in developing local structure and governing local groups aligns with National's role of providing groups with the resources they needed, including material resources such as distributed fundraising structures, access to the VAN, and a structure for endorsing local candidates, and resources in the form of expertise including legal expertise (providing access to an attorney who could advise groups on campaign finance laws), strategic expertise (including trainings on campaign planning), and cultural expertise (such as anti-oppression training). Groups were not required to use the resources provided by National; however, all the groups I encountered used at least some of the resources provided. They were able to pick and choose based on what worked best for their group's goals. In this way, hybrid memberships contributed to (re)producing hybrid structures (discussed further in RQ3B).

Third, local memberships contribute to guiding the National agenda and the National agenda was set in part in response to the needs of local groups. For example, local groups participated in the 2017 Listening Tour, and the needs they expressed helped shape the emergence of National structures like voter outreach. However, while local and National

leaderships agreed that local groups should play some role in setting the National agenda, the way this played out in practice became a site of divergence and conflict, and will be discussed in greater depth below.

3. Divergence.

As discussed above, there is some convergence in meaning around how members of different leadership groups negotiate their roles relative to one another, including convergence in understanding the role of local leaderships as having some agenda setting power and the role of National as responding to local groups. However, meaning diverged as members negotiated the degree of agenda setting power held by local groups and the degree of responsiveness enacted by National. In other words, *who leads the leaders* in a hybrid leadership structure? From this negotiation emerged a tension between the local and National leaderships.

The tension between National and grassroots leaderships escalated over time as group leaders developed and became more empowered. In the early period of RU, including the summer 2017 Listening Tour and the start of the Regional Institutes in October of 2017, both leadership groups were eager to work together to negotiate their roles. The presence of multiple leaderships was a source of excitement, with group leaders expressing excitement at the emergence of a guiding National structure and National leaders expressing excitement about the broad involvement of so many local group members. However, through the process of development, group leaders gained skills and expertise to exert power in the political sphere, and as they did so, they desired greater decision-making power and authority within RU. This led to conflict as group leaders sought to negotiate their roles as leaders not only locally, but at the organizational level.

As group leaders became more empowered, National sought to maintain a balance between itself and local groups. One National department director, at a state convening in February 2019, summarized the key questions involved in negotiation and framed National's approach as a balance: "What is National? What is local? It's always a question of how you get that right—what is national doing, what are locals doing, and how do you balance between that." OT member Darin, in an October 2018 interview, highlighted the tension between autonomy and connection that pervaded the local-National relationship: "it's always tricky because our groups are so autonomous because in a lot of ways they are, you know sort of sovereign and they get to decide for themselves what direction their groups are going to take. Finding the right balance of assisting them and giving them the space to have their autonomy is a tricky thing." Both of these staff members use the word *balance*, suggesting they take a both-and approach to the tension between leaderships. Their sentiments were reflected in comments by other staff members as well.

Yet members do not always perceive organizational practices to align with a balancing or both-and approach. This resulted in part from contestation over the meaning of RU National's motto that "we aren't the leaders of this movement—you are," suggesting the organization is led by grassroots members and those members hold the power to lead. In other words, the motto suggests that balance is struck by devoting National resources to support an organizational direction as determined by the local groups. Yet both grassroots members and National staff question this statement, either implicitly in their questioning of particular decisions or explicitly in overarching critiques. One group leader commented that "Right now they [National] say they are [bottom up], but it really feels top-down." A staff

member echoed this sentiment: “Is the organization member-led? We say it is. But who really makes the decisions?”

Questions about who leads the leaders were raised in general as well as in specific moments of conflict, or critical incidents. The first moment of contestation emerging in my data occurred in late 2017, between my first and second field visits. The narrative was relayed to me multiple times, by group leaders as well as National staff. A critical incident about the role of local versus national leadership involved news breaking that Minnesota Senator Al Franken had been accused of harassment by several women in the outpouring of similar stories constituting the early #MeToo movement. When this news broke, RU National almost immediately issued a condemnation of Franken on social media. This was done, according to participants, without consultation with local group leaders. Eli, a member of the OT, commented that the decision was made quickly because it was so clearly in line with RU’s professed values as a “feminist organization.”

At the time, Franken was a popular progressive Senator who was supported by the RU groups in his district. According to participants, some local members of Minnesota RU groups were angry that Franken had been condemned, suggesting that the accusations against him were not serious enough to merit such a statement against a popular progressive leader. More members, however, were upset less by the decision itself and more by the decision-making process—that is, that they had not been consulted. They did not oppose the condemnation per se, but did not believe National should have made such a statement without working with leaders on the ground. This incident led National staff to renegotiate how member input is sought out and incorporated. One staff member in particular began working with local leaders to build out a meso-level structure, which will be discussed in the

next RQ. However, tensions were not entirely smoothed over. The Franken incident arose later, including in February 2019, as evidence used by group members who were suggesting that National did not give sufficient consideration to groups' perspectives when making decisions.

Another critical incident involving local and National leadership tensions had to do with the endorsing candidates for election. In response to what National heard from local groups during the listening tour, structures were developed throughout 2017 and 2018 that would enable groups to exert influence over local elections, including Congressional elections. One structure that enabled this was the endorsement process. Groups were able to vote to endorse a candidate for election, and, if endorsed, allow that candidate to say they were endorsed by the local group. However, greater influence was possible if candidates could also be endorsed by the National structure. National thus rolled out a process by which groups could request a National endorsement for their preferred candidate. As staff members relayed during Regional Institute training sessions on the endorsement process, by prioritizing endorsements for candidates that pledged to pay their interns and implement meaningful policies protecting campaign workers from sexual harassment, RU could not only influence voters by lending its brand to the most progressive candidates in the field, but also leverage the potential of an RU endorsement to shape the way candidates ran their campaigns.

The National endorsement process enabled groups to seek out a National endorsement for their preferred candidate. This required the group to engage in a formalized process set out by National, with requirements and benchmarks for participation standardized by the National political team. These processes included requiring a candidate questionnaire.

affording the opportunity for all group members, and not just group leaders, to vote, and establishing a threshold level for groups to approve an endorsement (e.g. the threshold could not be lower than a 2/3 majority). Endorsements became highly contentious, as there was stark disagreement among some group memberships about which candidate to support. In at least one case, two RU groups operating in the same Congressional district sought endorsements for two different candidates in the Democratic Congressional primary, creating tension in the district. And even within some groups, members were split, and these disagreements connoted the bitterly contested 2016 Presidential primary that nearly fractured the Democratic Party. In fact, fear of reproducing the Bernie-Hillary divide of 2016 was one of the most common reasons given by group members for opposing the endorsement process.

While many group leaders expressed concern to me that the endorsement process had more potential for dividing groups that it did for uniting them, other groups were excited about the process. By February of 2018 the first wave of National endorsements for that fall's Congressional election were made public. Since the endorsement process, in the form described above, was an opt-in process in which groups could simply choose not to participate, contention was limited. Groups that believed the process could be harmful simply chose not to endorse a candidate.

However, as the 2020 Presidential election approached, National began sending out test balloons to gauge groups' support for a National-level Democratic primary endorsement. Email blasts asked members to weigh in on whether they thought a National primary endorsement was a good idea. Annette reported to me that the survey had shown heavy opposition—only about 20% of members supported the idea, 50% opposed it, and 30% were unsure. Though I was not given access to the data, others verified that there had been strong

opposition to the idea. As Annette told me, members with whom she was in contact believed that would be the end of it—there was little support for a National primary endorsement. However, RU National pressed the issue, and it remained an open question for months afterward. Indeed, to my knowledge, no concrete decision was ever made *not* to endorse—time simply ran its course and the primaries concluded with Sanders conceding to Biden in April of 2020. The following month, once Biden was established as the presumptive nominee—yet in the midst of resurging accusations about his past predatory behavior toward women—RU's membership voted (with 95% in support) to endorse Biden's candidacy.

The National primary endorsement became a major point of contention between the leaderships. During my field work in February of 2019, several members of groups in a reliably Democratic coastal state expressed deep concern about the process, explicitly connecting it to the National-local divide. Some, like Annette, even questioned National's motives for wanting to endorse. She felt strongly that National wanted to endorse not out of a desire to uplift local groups' power, but rather because National staff faced pressure from others in DC to do so and it would raise National's profile both among DC advocacy groups and with the chosen candidate. The local groups, on the other hand, would suffer. In places like Ohio, Michigan, and Pennsylvania, groups did not necessarily support—or want to be associated with—the most progressive candidate in the field. For some groups, a National endorsement would mean having to drop their association with National in order to maintain their credibility with centrist constituents in their own districts. Even in progressive strongholds like the Bay Area of California, group leaders suggest their members were "up in arms" about the idea of a primary endorsement due to the strong potential for divisiveness.

Much like in the Franken incident, the endorsement conflict suggests that group leaders were angry not only about the possibility that National would act against their interests, but about the fact that they felt unheard by National—in other words, by the fact that their leadership role was not respected. Karen, a group leader, raised the issue of endorsements in a larger conversation about how to manage the tension between National and local leaderships: "When National decides on a policy, like endorsements, including us in the thought process is [key to] being a thought partner, rather than announcing it and making us do it. There's feedback on Slack, but for example on endorsements there was feedback that the policy was ripping groups apart, but no sign that anyone even heard that." Karen's comment highlights that while National did actively solicit feedback in the endorsement process (unlike in the Franken case), she did not perceive that feedback to have a meaningful impact on the decisionmaking process. Annette said the endorsement process showed that National boasted of shared leadership, but when it came down to practice, that claim was only "pay[ing] hollow lip service." These members perceived that National was not holding itself accountable to the values it espoused, and this dissonance exacerbated tensions and created conflict.

For members that perceived accountability to values, trust in National was enhanced. In this way, the fact that National did not decide to have a National-level presidential primary endorsement (though the option was never fully taken off the table) was heartening to some. A group leader, Vivian, linked the decision to accountability to organizational values. She commented, "even the guide said, you know, you have to listen to your group, and if you are going to endorse you need to have at least two thirds of a majority for your vote, not just half, like, or a little over half. It really should be a really strong majority. And so they, you know,

they're following their own advice." By holding itself accountable to the same standards as groups are expected to be accountable, National increased trust among *some* grassroots leaders.

These critical incidents illustrate contestations of hybrid membership. Membership groups (local and National) together constitute RU, and members must negotiate their roles relative to other groups. When local and National memberships disagree about the substantive roles each should take on, conflict occurs. The critical incidents here suggest that conflict emerges when local group leaders feel that their roles are minimized and their input unheard by National. Conflict can be managed when there is a sense of shared priorities and mutual accountability.

4. Membership Negotiation in a Distributed Hybrid Structure.

The relatively autonomous nature of the local groups meant that members have a great deal of freedom to negotiate roles at the local level. Data suggested a few categories of ways members made sense of their roles. Some identified as *insiders* in RU, perceiving themselves a committed members who were actively involved in the organization. Others identified with RU's brand, but took actions largely unrelated to the tools provided by RU. Still others came to negotiate their membership as *outsiders within*.

*Insiders* manifested in three ways. First, many members considered themselves insiders or members of RU by virtue of active involvement in their local groups, using RU's tools to do work relating to RU's overarching goals, but did not engage heavily with National. For example, Lilly explained, "I think there was once a discussion of, well we don't really need to pay all that much attention [to what National does]. I mean, obviously we pay attention, but we don't have to ask them, necessarily, for permission… I don't feel

particularly connected to them." This leader did, however, feel connected both to her local group and to the network of groups that had emerged in her state.

Second, some members strongly identified with the RU brand, but engaged only minimally with National and did not use National tools. Due to the focus of my fieldwork being on trainings run in part by National, these participants did not show up in my data, but were reported to me by an OT staff member.

Third, some members identified with RU while trying to exert greater power relative to National; these members constituted their roles in part as an accountability structure. Said one group leader (Leslie) at the February 2019 CA State Convening, "It's like holding our [govt] reps accountable—we have to hold RU accountable." This member directly linked their skills and expertise in the political realm to their role in the organization. Similarly, an OT member, Taylor, used a labor organizing metaphor to describe how he saw the relationship between the leaderships, likening RU National to Management and the locals to Labor. In this metaphor, Labor (the locals) must constantly exert power to protect their interests against the encroachment of Management (National). This constitution of membership (re)produces hybridity by foregrounding the relationship between the multiple leaderships.

Other members constituted their roles by using tools and resources provided by National but focusing their organizing efforts within structures that were largely separate from National; these members represent *outsiders within*. Exemplary of the outsider within is Annette, who said this of National: "sometimes they've got great advice and I'm thrilled that they're there. And other times I just see what they're doing and stuff and I don't pay any attention. And I can do that because I'm from an independently organized group and like,

frankly, most of my time is spent in this kind of, in-between worlds where I mostly act as the mesh point between local leaders and the resources that they need and whatever I can give them." For Annette, the tension with National kept her from feeling like a full insider; her ongoing invovlement with RU was largely to take advantage of resources like VAN. The hybrid nature of the organization enabled her to negotiate her membership in this way, remaining actively invovled while not identifying as an insider. Rather than identifying with RU, Annette identifis with her breakout group, the Middle Tier, which will be discussed in RQ3B.

To summarize, this research question explored the tension between multiple leaderships in the membership negotiation flow. Findings followed the data to focus on negotiations of leadership, and I found that meaning both converged and diverged around the various leadership groups' roles. Specifically, meaning converged around the role of grassroots members as providing broad-based support embedded in local Congressional districts, developing and governing local group structures, and contributing to some agenda setting for National; and the role of National as liaising with Congressional offices, providing resources to groups, and responding to groups' needs and agendas. Convergence in these areas contributed to (re)producing hybrid leadership.

While there is some convergence in meaning around the roles of different membership groups in the hybrid RU structure, hybridity is not necessarily simple. Meaning also diverged in key areas, such as the degree influence local groups could exert on National agenda setting and the degree of responsiveness they could expect from National. Divergence resulted in contestation around *who leads the leaders*, and as members became more

empowered over time, contestations over meaning resulted in conflict between the leadership groups.

In short, the process of leadership negotiation involved tension and conflict. Volunteer and professional leaderships wrestled with the question of who leads the leaders, with proclamations about shared leadership representing a vision that is not always enacted in a way that satisfies grassroots leaders. Below, I will discuss some of the ways grassroots leaders responded to their dissatisfaction and the ways their responses shaped organizational structures.

### *E. The Leadership Tension and Hybridity in Reflexive Self-Structuring*

RQ3B asked about the how the tension between National and local leaderships influenced hybridity in the reflexive self-structuring flow. Similar to the membership negotiations flow, the National-local leadership tension can function either generatively or as a source of conflict in the reflexive self-structuring flow. Through reflexive self-structuring, the multiple leaderships (re)produced hybrid structures to facilitate communication at multiple levels including within local groups, between local groups, and between local groups and National. When there was convergence in meaning around the roles of various membership groups in (re)producing structure, the tension between local and National leaderships had a generative effect. When there was divergence in meaning around the roles of membership groups in (re)producing structure, the tension between local and National leaderships was a source of conflict. Conflict relating to the roles of various leaderships resulted in some fragmentation, and this fragmentation manifested in the form of diverging structures. While for some members, fragmentation was destructive and led to decreased trust in National, fragmentation also functioned to (re)produce the tension between local and

National leaderships in a way that prevented local leadership from being subsumed by National. By maintaining the tension, conflict has a generative effect.

1. Convergence.

RU's overarching strategy of aligned decentralization (discussed in RQ2) brings together the power of networked grassroots groups with the guiding principles and material resources provided by the formal National umbrella structure. When local and National leaderships converged in their understanding of members' roles in aligned decentralization, the tension between these leaderships was generative and (re)produced useful hybrid structures. Often, convergence occurred around an understanding of grassroots groups relying on

In RQ3A, I discussed three areas of convergence around membership negotiations: first, the complementary roles of grassroots and National leaderships constituting an inside-outside strategy; second, the role of grassroots leadership as determining and implementing local group structures and goals and National leadership's role as providing resources for groups to accomplish those goals; and third, the limited agreement around grassroots groups as playing some role in determining the National-level agenda. In each of these areas, convergence around membership negotiations enabled the leaderships to work together in ways that (re)produced hybridity in the reflexive self-structuring flow.

First, the multiple leaderships (re)produced hybrid structures facilitating an inside-outside strategy enacted through aligned decentralization. This was especially evident during both the legislative battle to protect the Affordable Healthcare Act (ACA, a.k.a. Obamacare), which came under attack in 2017, and during the Senate confirmation process for Brett Kavanaugh. First, during the health care battle, RU National identified states in which to

prioritize grassroots pressure, based on the likely voting positions of those representatives. The political team used their inside influence to liaise with Congressional staffers, and other teams developed call scripts for grassroots groups to use when contacting their representatives. Groups mobilized their members to phone bank and rally, making thousands of phone calls and holding dozens of protests and "die-ins" (events in which participants pretended to die, in visible and public places such as outside MOCs' offices, to represent the implications of repealing the ACA). The inside-outside strategy—combined with pressure from a wide array of other movement organizations—worked. Senator John McCain cast a historic vote, and the ACA remained largely intact. This battle represented a major early win for RU, and was frequently referenced, in subsequent years, as emblematic of what RU members could accomplish when working together in a coordinated, hybridized effort.

Similarly, during the Kavanaugh confirmation process, RU National and the grassroots groups worked together in ways that (re)produced hybridity. RU National developed the overarching strategy, and local groups exerted on-the-ground effort to implement that strategy. National policy team staff developed a two-step strategy of first, pressuring moderate Republicans to vote against Kavanaugh, and second, campaigning to win back Senate seats to prevent a future successful Supreme Court nomination by Trump. This strategy was presented by Tammy, a National staffer, at the early summer 2018 Regional Institutes. While National staff liaised with Congressional staffers to determine where pressure should be prioritized, local groups rallied to pressure their Senators to vote against confirmation, especially those in Senator Collins and Senator Murkowski's districts (two of the key swing votes). Ultimately, they lost, and Kavanaugh was confirmed. However, the incident shows how National was able to pivot quickly from a focus on the fall 2018

midterm elections to the more immediate confirmation battle, and groups followed suit to play their role in the inside-outside strategy.

Second, multiple leaderships constituted hybridity in the reflexive self-structuring flow as National provided resources to grassroots groups that enabled those groups to accomplish their goals. A critical incident relating to anti-oppression work illustrates the generative potential of the relationship between local and National in this area. The goals in this case involved accountability to anti-oppression as a progressive value. As discussed above, anti-oppressive practices require ongoing learning or *becoming*, and despite anti-oppression trainings at the Regional Institutes, members' practice remain imperfect. An incident in early 2019 involved a local group leader's use of a racist term that she did not know was racist, and the unfolding of a response that resulted in the implementation of bystander intervention training. The racist term was used in the chatbox during a statewide conference call (the chatbox being a text-based supplement to the audio conference, enabling participants to chat over text while simultaneously listening to the speaker; it is often used for asking questions or for clarification without interrupting the speaker). Based on the Regional Institute trainings, the appropriate response to the use of this term would be for a fellow member to gently intervene and "call in" the offending member by explaining the historical context of the term and requesting that it not be used again. However, in this instance, no one intervened.

After the call, discussions began about how to better hold members accountable to shared values. The statewide call had occurred during the lead-up to a statewide meeting, and OT staff and grassroots leaders involved in the planning of that meeting decided to introduce additional accountability structures at the statewide training. Together, they planned and

implemented a bystander intervention training. The bystander intervention training was introduced first at trainer-training on the Friday of the state meeting, during which all members of the weekend's leadership team (constituted by about half grassroots leaders and half National staff) were trained on the intervention by a National staff member. The leadership team then trained the full group of statewide meeting participants on the following day, the first day of the two-day long statewide meeting.

The bystander intervention training represented hybridity in that it formalized an informal practice. As Julie, the OT staff member who led the intervention training, said as she introduced the module:

> This is on everyone's mind. We want to create a truly inclusive space that's open for everyone, but this is hard to balance. Frequently, a group norm is naming impact. What we've found on a national scale is that isn't always enough. It's really different to assume best intentions and name impact in the moment. We want an intervention plan for all our big meetings, both for the [leadership] team and all participants. We're interested to see what others think. On the staff side, we've found that practice in intervening is really important.

In order to implement that intervention plan, Julie trained all members of the leadership team on how to intervene by saying the following sentence: "Racial equity and inclusion are foundational principles of the RU Movement. When you said/did X, that made me feel unsafe because that remark was racist and does not live up to our values. I am asking you do stop saying/doing that." She emphasized that it was the responsibility of leaders to intervene, especially leaders with structural privilege (e.g. white people). The practice could then be

taken back to local groups and implemented by leaders there. Ultimately, the bystander intervention training formalized the informal norm of "calling in," at least for the duration of the weekend-long training. The resources for calling in were developed by National, with the input and buy-in of group leaders invovled in planning the statewide meeting, and shared out to group leaders to be implemented in the distributed network.

Third, the multiple leaderships worked in concert, in some areas, to (re)produce hybrid structures to accomplish an agenda set in tandem by grassroots groups and National. This was especially evident in the shift toward an electoral focus. The 2017 Listening Tour found a widespread desire among grassroots groups to focus on local elections. In response, National developed or acquired a number of tools, including VAN access and endorsement procedures, discussed above. These tools and others were housed under the "RU435" program. Additional tools included in RU435 were guides to Electoral Politics 101, voter registration, voting rights and voter suppression, voter ID laws, and compliance with campaign finance laws. Tammy, a National staffer in the Political department, said of the program: "We want to provide support to any group that wants to do electoral work. We want programs to be run autonomously and not rely on a campaign office. We've been having conversations with state tables (groups of people who work on elections) to find areas that need more focus," and those areas were developed over time into new guides and resources shared online.

While National developed tools and guides based on the grassroots groups' desire to influence local elections, grassroots groups reflexively self-structured to incorporate into their own practices the use of those tools and the knowledge in the guides. For example, in order to incorporate VAN use into their practices, groups needed to implement formal

structures, as VAN use must occur within certain legal parameters. Similarly, endorsements required certain structures, though those structures (as discussed above) were decided upon by National (as opposed to the Federal Elections Commission, which dictates policy around political campaigns). Incorporating these structures—especially around FEC compliance—was challenging for groups. Question-and-answer time during training sessions on electoral work often ran over time or was cut off with questions still remaining, as many participants had questions about the nuances of laws around coordination with campaigns and other topics. Groups reportedly spent a great deal of time and effort (re)producing structures that enabled them to take advantage of these tools, but many also saw great benefits.

These three areas of convergence illustrate the ways National and grassroots groups draw on and (re)produce hybridity in the reflexive self-structuring flow. Early on, especially—such as during the healthcare battle—many groups turned to National for guidance on how to proceed with their efforts. For example, they relied on call scripts produced by National to support phone banking efforts, and employed tactics laid out in the RU *Guide* to pressure their Members of Congress. In doing so, they (re)produced hybridity and demonstrated the interdependence of National and grassroots leaderships. However, the reliance on National also demonstrates that there may be a great degree of power held by the National leadership. Furthermore, while structures overall were aimed at member empowerment to participate in the activities groups wanted to engage in, the way activities were prioritized was also influenced by National—for example, the pivot from midterm elections to the Supreme Court nomination. While in the cases described here, the leaderships overwhelmingly converged in their priorities and goals, there were also areas of divergence and conflict, which I turn to next.

2. Divergence: Balance of Power.

While the tension between local and National leaderships functioned generatively when meaning around *aligned decentralization* converged, divergence in meaning emerged as grassroots members sought to exert greater power in the structural (re)production of RU. This occurred in the endorsements incident, described above, which was in part relating to the role of the leaderships in making organizational decisions (whether or not to endorse) but also in (re)producing organizational structure (whether or not to build out a structure for National-level presidential primary endorsements). It also occurred in another major incident from which emerged two structures: the Meso Tier and the Coordinated Network for Action (CNA).

i. *Critical incident: Meso Tier and CNA.*

A key critical incident relating to the leadership tension and (re)producing hybridity involves the emergence of two divergent structures with similar goals: the Meso Tier and the Coordinated Network for Action. The incident began with group leaders' identifying an important area of untapped potential: there were many members of local groups with various areas of expertise that could prove useful to RU, but were, in the distributed structure, confined to their local groups. For example, some members had web design experience, were public relations professionals, or were experts at any number of activities necessary to movement building. Yet because of the decentralized nature of the organization, those skills were being tapped only by the groups of which any expert individual was a member. Structurally within RU at that time, the only way for group leaders to connect with one another was through OT staff, and there were simply too many group leaders and too few OT staff to build many connections that way. Much more could be accomplished if there was a

sort of central clearing house in which resources and needs could be matched. For example, a small group in Oklahoma might need a PR expert, and could use such a platform to connect with a member in California who had such expertise. Having engaged in some discrete efforts to lend his own expertise to assist groups in other states, Annette said, "I really saw what coordination could be, right? Like wow, you know if we can take somewhere like SF, you know, with a lot of professional skill, and combine it with a place like Illinois, that was remarkably well-organized—like they're still probably the best organization in the country—so much is possible. Like how can we do that other places?" Furthermore, a structure enabling better coordination would also enable better, clearer feedback processes by which local groups could influence National strategy. This was especially necessary following ruptures such as the Franken incident.

Annette began identifying other group leaders and talking with them about the idea, which came to be called the Meso Tier. She and other leaders, representing at least three vastly different states (one large, deeply blue coastal state; one mid-sized, blue-leaning midwestern state; and one mid-sized, industrial purple state), began formulating a plan. Although at first Annette brought the idea to National staff, it did not gain traction there: "I tried for most of the first year to try to get National to understand what was possible, and I failed, or they failed, or a combination." Lindsey, an OT staff member who worked closely with Annette, confirmed that efforts were made to get National support but ultimately that support did not manifest. This was in part due to Annette working, initially, with Eli, a staff member who left the organization soon after the point at which Annette believed she had gained that person's support for the idea. Eli had supported the idea specifically because he recognized the need to avoid conflicts such as those emerging from the Franken

condemnation. But Eli left the organization suddenly and with little notice not long after his initial discussions with Annette about a meso level structure. "When he left," said Annette, "it just completely sabotaged the kind of, the whole project because we were now invested in working with National, and now we had no partner there anymore."

Instead of working with National, then, Annette says she "started just calling people across the country and saying 'Hey, I'm gonna do this something with RU and I heard you were doing something amazing, what is it?' And they would tell me and I was like 'Hey, would you want to share that with other people? Would you want to hear about similar best practices from other people? And recruited them to join our group," which at that time was coordinating using email and Google Docs. She used her position in the RU network—and strengthened that position by making new connections through social media contacts—to begin developing a structure without any involvement by formal leadership.

The original vision for Meso Tier was to function as a clearing house to share best practices and expertise, to match needs with resources, and to supplement the OT as a point of contact with National; it would also be a site for National to test new ideas and receive feedback from what Annette called the "deep grassroots." However, plans were hindered by Eli's departure, and the structure developed into what Annette calls a "support group," meaning that group leaders and members facing a particular issue can bring that problem to Meso Tier and find the support they need. Members of Meso Tier have a wide array of niche expertise, so whatever the problem is, it is likely someone in the group will be able to help work through it. As of February 2019, Meso Tier included over 200 group leaders from over 45 states.

The unfolding of the Meso Tier was shaped by the local-National tension in two ways: first, by relationships between particular local and National members, and second, by the principles of decentralization upheld by local leaders guiding the development of Meso Tier. First, Annette's relationship with National staff played an important role. Annette admitted to having a rocky relationship with National staff overall, calling herself a "squeaky wheel" with whom some National staff did not enjoy working. This was confirmed to me by National staff members who did work closely with Annette but acknowledged that some of their colleagues did not. Eli, too, had a rocky relationship with some of his fellow National staff. Thus, when Eli left the organization, it was difficult for Annette to continue working with National, and plans proceeded without National involvement.

Second, Annette and her fellow Meso Tier leaders held strongly to the value of maintaining local autonomy. Annette in particular wanted the Meso Tier to be shaped by local groups in service to the needs of local groups. She wanted National involvement, but she "wanted it to already be in motion and for them to just take part." Annette's skepticism of National, too, shaped the degree to which she would work with National. Aside from her rocky relationship with many staff, there were few staff members who Annette trusted to respect the member-led Meso Tier effort. For Annette and her fellow Meso Tier leaders, autonomy was the most highly valued principle. In the networked RU structure, it was possible for them to protect the principle of autonomy by simply moving forward without coordinating with National.

The personal relationships and principles of decentralization, compounded by the sense that National was unsupportive of the Meso Tier idea, led Meso Tier leaders to exclude National staff from its platform. The Meso Tier moved forward autonomously and in conflict

with National. Though at least two OT members were supportive and trusted to some degree, others were hostile to Meso Tier. One commented to me that “Meso Tier is a clique” (Bobby).

Thus, Meso Tier was born of and (re)produced the tension between local and National leaderships. Subsequently, the emergence of another structure, the Coordinated Network for Action (CNA), was also shaped by the tension.

The idea of CNA was planned in the second half of 2018 and introduced to groups in early 2019, well after the formation of Meso Tier. Data suggest that the emergence of CNA resulted not only in response to the Meso Tier but also in response to the contentiousness of the discourse around endorsements and a growing sense that group leaders did not feel heard by RU National. According to a National staff member whose role involves working closely with the structure, described the CNA as being “about groups and National staff coming together for better communication, better feedback mechanisms for stronger alignment, and to make sure that when National makes decisions in rapid response or big-picture strategic decisions, those are guided by the movement,” as well as about “finding and uplifting mechanisms for sharing best practices.” In other words, the goals of CNA were remarkably similar to the goals of the Meso Tier: serving as a clearing house for best practices, matching needs with resources, and enabling coordination between local and National, with an emphasis on local groups providing feedback to National.

Considering the degree to which CNA’s goals aligned with Meso Tier’s goals, it is noteworthy that National developed the CNA as a separate structure rather than building on the work already occurring in Meso Tier. National knew about Meso Tier, but deliberately chose to build out a separate structure rather than attempting to bridge the divide and

coordinate alongside Meso Tier organizers. That decision is ironic in light of the goal of having decisions be "guided by the movement." Annette suggests that being truly guided by the movement would have meant supporting and working with Meso Tier, rather than building out a redundant structure.

CNA differs from Meso Tier in its locus of power. Meso Tier is run by distributed RU leaders and members report that it is nonhierarchical. Anyone who is a group leader may join, and conversations on the platform are only lightly moderated; moderators are other group leaders. CNA, on the other hand, is led by National staff. Joining requires a sort of screening process that has been perceived by members as a way to identify members who are in strong alignment with National. And, importantly, the CNA centers coordination with National, according to training documents; this is distinct from the Meso Tier, which was oriented around coordination among networked groups. CNA is therefore more oriented toward centralization, and creates a stronger pull by the National leadership.

### F. How Hybridity Enables and Constrains Both-And Approaches to the Leadership Tension

In RQ4A, I ask how hybridity enables or constrains both-and approaches to the tension among multiple leaderships. Though multiple leaderships exist in tension, hybrid structures may provide useful avenues for managing tensions like this one (Jay, 2013). I found that in RU, hybridity functions to both enable and constrain both-and approaches to the tension among multiple leaderships. Hybridity enables local and National leaderships to work together in the paradoxical situation of *aligned decentralization*. However, the pull toward formal, professionalized logics (which is strengthened in part by the use of professionalism as a sensemaking mechanism) can constrain both-and and more-than approaches. When this

happens, members may respond in a variety of ways, including resistance or exiting the organization. Hybridity enables effective resistance by local leaderships who draw on informal structures to pull back against the power exerted by National. This allows the local leadership to remain in tension with National rather than becoming overpowered or subsumed.

In addition to enabling both-and approaches to the tension between local and National leaderships, hybridity also enables local groups to negotiate a related tension between local leaderships with different degrees of formality. The organizing team plays a key role in how the tension is managed.

1. Hybridity and the Leadership Tension.

As discussed above, *aligned decentralization* is an inherently paradoxical practice by which local and National leaderships both play critical roles in the organization. Local and national leaderships are mutually constitutive of RU, and the leaderships each have resources that complement the other: locals have outside influence on members of Congress, relational ties that contribute to sustainability of member involvement, and can mobilize large numbers of people in their geographic areas; National leadership has inside influence, political skills and expertise, and can access resources (like major donors facilitating large-scale programs like VAN) that are then distributed among local groups.

Though *aligned decentralization* inherently involves both leaderships existing in tension, there can be a stronger pull from the National pole of the tension. This was discussed above in RQ3, especially in the areas of endorsements and the CNA. Part of the reason the National pole can pull more strongly is due to the use of professionalization as a sensemaking tool by members to indicate legitimacy, discussed in RQ1. Professionalization

was seen by National and local leaders as a marker of legitimacy, which in turn suggests that professional leadership is more legitimate than local volunteer leadership. This creates a strong pull toward the National pole of the leadership tension. By privileging one pole of the tension, both-and opportunities are constrained.

Members respond in various ways to the strong pull of National. Indeed, groups have varying levels of concern with regard to the balance of power between the leaderships. The autonomy of the local groups afforded by the hybrid structure of RU enables groups to respond in various ways. Some groups or group members drop off. For example, when National did not respond quickly enough to their needs for electoral tools, groups in Virginia left RU to participate directly in local electoral campaigns (according to Jess, the OT staffer on that turf). Others threaten to drop off, such as groups fearing that a National presidential primary endorsement would alienate them from their local constituencies (according to Annette). In these cases, hybridity facilitates an ease of exit by members that gives rise to a delicate situation in which the National-local tension can be a direct cause of attrition. If the tension is not managed to the satisfaction of local groups, some will simply cease to be involved with RU.

Some leaders, however, prefer not to exit but rather to resist. When the National pole of the tension creates a stronger pull, hybridity enables local leaderships to pull back, maintaining the tension with National rather than becoming subsumed. This is most evident in the Meso Tier/CNA incident discussed above. The Meso Tier was developed by local leaders to build power among local leaders without relying solely on National to facilitate coordination. By instantiating a structure within RU that was fully grassroots-led, local

leaders involved in Meso Tier created a pull toward local leadership that helped maintain the tension between local and National.

Because RU is mutually constituted by local and National leaderships together, and National relies on a large network of groups in order to exert influence, acts of resistance as well as the (explicit or implicit) threat of attrition encourage National to take both-and responses to the leadership tension. In fact, as conflict around endorsements and Meso Tier escalated during the period of late 2018 and early 2019, National made greater efforts to take a both-and approach to the leadership tension, facilitated by hybrid structures. These efforts were the direct result of resistance by local leaders. For example, at the California State Summit in February 2019, National staff engaged in semi-formal conversations called "listening sessions" with local group leaders about how to improve working relations. These conversations were set up as part of the Convening program by local leaders with the support of their OT staff, with the goal of allowing group leaders to directly express concerns and feedback to National staff. National staff members who attended the Summit, including members of other departments in addition to the OT, participated. The listening sessions represented ongoing efforts to engage in membership negotiations *with* local leaders that emerged as a result of pressure by local groups.  The sense that National had come to the table and allowed group leaders to be heard contributed to a sense of optimism among local leaders who had organized the sessions, as expressed in brief interviews following those sessions.

Another, more complicated response to member resistance was the development of the CNA, which RU staff intended to serve as a meso layer between National and local leaderships, enabling local leaderships to better voice ideas and concerns. As a structure

isolated from the context in which it emerged, the CNA would seem function as a hybrid structure enabling both-and approaches to the leadership tension. However, that construction is problematized by the fact that the Nationally-led CNA was developed as a parallel structure to the locally-led Meso Tier, rather than collaboratively developing Meso Tier alongside local leaders. In the context of its history, CNA ironically contributes to (re)producing the divide between National and local by undermining the legitimacy of the Meso Tier. National heavily promoted CNA while brushing off the Meso Tier as a "clique," suggesting National staff perceive the professionally-led CNA to have far more legitimacy than the locally-led Meso Tier. This privileging of CNA over Meso Tier, in turn, suggests that National staff may continue to privilege their own leadership, which could in the long term undermine both-and approaches to the leadership tension.

In short, hybrid structures enabled leaders in both the National and local groups to exert power and (re)produce the tension between the leaderships. The tension was generative in the sense that as both poles pulled and created tension, hybrid structures were (re)produced to facilitate better both-and collaboration. However, factors contributing to a strong pull by National—primarily, professionalization as a proxy for legitimacy—have long-term implications. For example, at the conclusion of data collection for this study the CNA had only recently been rolled out, and it is not clear from my data how the CNA will (or will not) interact with the influence of the Meso Tier.

2. Role of the Organizing Team.

Data suggest that the Organizing Team plays an important role in how the leadership tension is negotiated in the hybrid context of RU. The OT serves as a meso level between the

centralized National structure and the decentralized network, facilitating the *alignment* in *aligned decentralization*.

The day to day work of the OT is inherently related to the National-local tension. OT staff facilitate communication between National and local leaderships, provide National resources to local groups, and guide local leaders on how to take action based on National's model. As Natalie, an OT staffer, said, "I feel my role [as a staff organizer] is taking the message from National and putting it through the lens of [my turf]." Another OT staffer, Ray, described his role in greater depth:

> There's like tension between leadership and people on the ground or between organizing and the other departments, a lot of the time is that we are not able to function as a top down organization. I cannot very well contact very many of my groups to say, "Hey, this is a national priority. This is what we need to do." Many of them take national cues from national, you know, act on things, but a lot of them also are working on state stuff, perhaps on other priorities so they work around that. It depends very much on the group. Every interaction that I have with them is spending my own kind of social/political capital with group leaders. As much as possible, well, the day-to-day often is checking in on groups where they are, doing electoral activity, seeing where they might still need some support. For instance, "Oh, great! We've got you off the ground, and you're using VAN to build phone banks, and canvass lists, and you're doing that. Now, you know, the next level, of getting deeper into that, is volunteer recruitment and retention, recommitment to shift in that nature.

There are several interesting points to draw out relating to Ray's description of the OT's role, which is largely in line with how other OT staff described their roles. First, Ray refers to National as "leadership" and group leaders as "people on the ground," unintentionally delegitimizing the leadership role of volunteer leaders (as discussed in RQ1A). Second, Ray touches on the autonomy of local groups, illustrating how autonomy is in tension with alignment and groups may choose to prioritize their own local issues rather than focusing on National priorities. This distinction is interesting because a foundational goal of RU is to empower local groups to take action on local issues. According to that logic, local priorities *are* National priorities; and yet Ray situates them in tension, suggesting that the focus of local leaders may diverge from the desired focus of National. Third, Ray explains his role as identifying the needs of group leaders and helping those group leaders to manage the transactional-transformational tension. This suggests that the OT plays a role not only in negotiating the tension between the National and local leaderships between which the OT is situated, but also in negotiating other tensions. (The OT's role in negotiating the transactional-transformational tension will be discussed in greater depth in RQ4B below.) Finally, Ray notes that interacting with group leaders requires the spending of social and political capital, meaning OT staff must engage in persuasive efforts in working with local groups and may have to prioritize certain efforts over others.

Like the local group leaders, OT staff have a degree of autonomy. Their autonomy is especially characteristic of how OT staff negotiate roles relative to local group leaders, contributing to the ways they negotiate the local-National leadership tension and how they choose to spend social and political capital. The notion that OT staff must expend social and political capital in their efforts to work with group leaders suggests that pushing group

leaders beyond what they are already doing involves a relational cost, and staff must negotiate when and how to do so. In other words, OT staff negotiate when and how to push for greater alignment, pulling on the National pole of the leadership tension.

By virtue of their liminal position, OT staff not only have power to pull on the National pole of the leadership tension, but also to pull on the local pole. In other words, OT staff have power to enable (or constrain) group leaders seeking to exert power and voice in the reflexive self-structuring flow. Since OT staff were the main point of contact in National for group leaders seeking to exert power, the way OT staff handle their roles—including, specifically, how they work to enable or constrain group leaders' power—significantly shapes the impact the group leaders can have.

When OT staff work alongside group leaders, they can enable group leaders to exert more power. This was especially evident in three states (one blue, one red, and one purple) that built out statewide networks to better coordinate among grassroots groups. The formation of these networks was spearheaded by group leaders but enabled significantly by the staff organizers assigned to those turfs. Staff organizers were able to connect grassroots leaders with other leaders in their states, train leaders in the use of distributed networking tools like Slack, and otherwise support the development of statewide coordinating networks.

The efforts of local leaders and OT staff were especially fruitful in California, where local leaders had an abundance of expertise, a great deal of resources, and unusually large membership bases eager to participate in work outside of their home districts (due to the political landscape of the state—many groups operated in deeply blue districts and realized they could have a greater impact if they lent their time and resources to groups in nearby red districts). The California groups worked with their staff organizers to build out California

StateStrong, a network that became a model for National in developing other networks around the country.

However, the OT can also constrain possibilities for multiple leaderships working together. One major factor that constrains OT staff—and, as a consequence, the local members they work with—is the size of the OT. Though the OT tripled in size from ten to thirty staffers during the course of this study, the scope of their turf—and the number of members with whom any given OT staffer worked—as still enormous. Both OT staff and grassroots leaders agreed that the OT was simply spread too thin. Darin, an OT staff member initially in charge of several states, described how he was constrained in developing many deep relationships with group leaders because there were simply so many group leaders in his turf. Even when more organizers were hired on and his turf was reduced to only two states, it was difficult to connect deeply with leaders. As discussed above, those deep relationships between grassroots leaders and National staff were beneficial for group leaders exerting power, and the scarcity of those relationships functioned as a detriment.

3. Hybridity and the Tension Between Formal and Informal Leaderships Within Local Groups.

Despite groups' differing local structures, informal leadership seemed to complement formal leadership across groups, constituting hybridity at the group level as well as the organizational level. This was reported by members of groups using the *snowflake model* of distributed leadership as well as groups using more traditional bureaucratic models. However, hybrid leadership functioned differently in different group structures. Data suggests that hybrid leadership in the snowflake model enabled generative more-than approaches to formal and informal local leadership; hybrid leadership in the bureaucratic

model, however, constrained more than approaches, though both-and approaches were still possible.

The *snowflake model* is designed to bring together formal and informal leaderships. Formal roles are defined in that a person is typically designated as responsible for coordinating activity within a given branch of the snowflake. However, informal leaders are encouraged to take on leadership roles. As one leader, Krista, explained, she was eager to hear ideas brought to her by group members, but “I’m not open to any ideas that you yourself aren’t willing to implement.” When a group member brought her an idea, she would encourage that person to become an informal leader in spearheading its development and implementation. The flexibility of the snowflake model meant that some of these informal leaders, by routinely taking on leadership roles, became formalized as branches of the snowflake. Robert, a leader in Krista’s group, confirmed that he became a leader through this process. Thus, both formal and informal leaders are legitimized in the snowflake model, and the leaderships engage in a generative more-than relationship that results in increased capacity and leadership development.

In groups using a bureaucratic model, too, informal leadership supplemented formal, but in different ways. Bureaucratically run groups had formal elected leaders constituting some sort of hierarchy; for some, elected leaders included a President and Vice President; others elected a board or steering committee responsible for decision making. Even in these bureaucratic groups, though, informal leadership played a role, even if those informal leaders were not empowered to make decisions for the group but rather to lead in other ways.

One group member, Maureen, described her local group, whose leadership body included a steering committee of ten members who had the power to vote on group

initiatives. When asked to identify what constitutes a leader in her group, Maureen said, “when I'm talking about leaders of our group, they’re not necessarily on the steering committee. And I also think that there are people who are on the steering committee who I wouldn't consider acting as leaders.” This included Maureen herself: “I am not on the steering committee, I’m not an elected member of the steering committee. But I’m, I would consider, and I think other people in the organization would consider me to be, in a leadership role in the organization.” Maureen described her own leadership role as coordinating publication of a semi-regular member newsletter, organizing events such as movie nights, and facilitating one-on-one conversations with members she believed to be potential leaders. In this model, formal and informal leaderships operate in a both-and approach to the tension. However, the leaderships are not in a generative relationship; these findings suggest the bureaucratic model constrains both-and approaches to the leadership tension by crystalizing a divide between formal and informal leaders.

In the bureaucratic group, like the snowflake group, informal leadership supplemented formal leadership in important ways. However, in the snowflake group, leadership was managed using a both-and approach: hybridity increased the group’s capacity and empowered informal leaders to take on greater roles. In the bureaucratic group, hybrid leaderships were constrained by the more formalized structures in which they operated. While these two groups discussed here do not provide a comprehensive accounting of local group structures and their comparative advantages, these participants’ narratives suggest that hybrid structures may have greater potential to enable both-and approaches to leadership tensions at the local level.

To summarize, hybridity both enables and constrains approaches to the tension between multiple leaderships. Though hybridity enables local and National leaderships to work together through *aligned decentralization*, the pull toward professionalization at the National level privileges National leadership over local and thereby constrains both-and approaches. However, local leaders may resist professionalization and (re)produce structures that pull toward local leadership, enabling those leaders to maintain their status as in tension with National. The Organizing Team plays an important role in supporting local leaders' resistance efforts. In addition to these impacts at the National level, hybridity also enables both-and approaches to the leadership tension within local groups. Local groups using the snowflake model of group structure are able to effectively draw on the leadership of both formal and informal leaders; those using the bureaucratic model seem to experience greater tension between formal and informal leaders at the group level.

### G. *How Hybridity Enables and Constrains Both-And Approaches to the Transactional-Transformational Tension*

In RQ4B, I ask how hybridity enables and constrains both-and approaches to the transactional-transformational tension. As in RQ4A above, discussing the way hybridity enables and constrains approaches to the tension between multiple leaderships, data suggests hybridity has the potential to both enable *and* constrain. The organizing team, again, plays a critical role in how hybridity enables and constrains approaches to the transactional-transformational tension.

1. Enabling Both-And Approaches Through Autonomous Community Building.

A key element of hybridity in RU is the autonomy of local groups. Autonomy means that groups can manage the transactional-transformational tension in different ways, and

groups will take different approaches. A theme that emerged in the data was the ability for local groups to build relationships constituting community among members (transformational logics) in order to maintain long-term involvement in mobilization efforts (transactional logics). The autonomous, local focus was key because community building on a large scale can be quite difficult; in local groups, however, leaders can adapt community building efforts to the local context.

Hybridity enables practices to be shared widely among the distributed network and adopted by groups according to their local needs, and this flexibility facilitates both-and approaches to the transactional-transformational tension. Data suggests a key way in which this happens is through the adoption of practices that enable community building. In RU's hybrid structure, there is some sense of community and identification at the National level (e.g. all members affiliated with RU), but this is distributed unevenly among members; more commonly, group members felt strongly identified with, and like members of a community in, their local groups.

In building a sense of community that enables long-term participation, local group leaders implement practices that represent both-and approaches to the tension. For example, in RQ2, I discussed the way Landon's group, IEB, used postcard parties as a site at which to develop deeper relationships. Other, similar examples also emerged in the data. Another group leader, for example, shared an activity she did in her group: she first had members write down how they felt after the 2016 election, eliciting responses such as "sobbing" and "despair." They then spent time envisioning what they wanted to see on the cover of the *New York Times* on the day after the midterm elections in 2018. How, Leslie asked them, would they get from the devastation of 2016 to the anticipated triumph of 2018? Group members

identified strategies mainly focused on talking to voters. Leslie had everyone sign up for canvassing shifts on the spot. Through this exercise, Leslie shared that group members developed a sense of community rooted in shared emotions and shared struggle and connected those shared experiences to the need to share, also, in the efforts to create change. The sense of one-ness or we-ness that emerges through shared experiences contributes to constituting community, enacting transformational repertoires. By connecting these transformational repertoires to the transactional practice of canvassing, Leslie's group took a both-and approach.

Through hybridity, groups are able to adopt practices introduced not only by National, but also best practices shared by fellow group leaders. In fact, Leslie shared the visioning practice described above with a workshop group during the CA State Summit, and other group leaders in attendance voiced that it was an exercise they would adopt for their own groups. Other practices were similarly shared, with fellow leaders reporting that they would work to implement relevant practices in their own groups.

Through the sharing of best practices at various levels and adoption of those practices based on autonomous local decision making, hybridity enables groups to approach the transactional-transformational tension. However, there are also constraints, and pressures on and by the Organizing Team can constrain the autonomy of local decision making. This will be discussed in the next section.

2. Constraining Both-And Approaches Through Large Scale Involvement, Responsiveness, and National-Level Pressures.

Data suggests that both-and approaches to the transactional-transformational tension were constrained by large-scale involvement, responsiveness to networked members and political pressures, and National-level pressures relating to professionalization.

First, the large-scale involvement facilitated by hybridity can constrain both-and approaches. In hybrid organizations, a benefit of hybridity is the ability to scale—seen clearly in the rapid mobilization of thousands of local groups at the inception of RU. However, transformational repertoires require deep relational work at the interpersonal and small group level and are more difficult to incorporate in larger groups. This posed a problem for RU in several ways. First, local group leaders reported that membership swelled early on, reaching into the hundreds for some groups (one especially sizeable group had nearly 800 participants at their first meeting, and had to hold two separate meetings back-to-back to accommodate all attendees). Engaging in deep relational work at this scale was impossible. After the initial few weeks or months, membership dropped off precipitously; this may have been, in part, due to the lack of community building at such a large scale. Second, the scale of groups relative to OT staff was challenging because, as discussed above, there was simply no way for OT staffers to engage in transformative work with all the group leaders in their turf. For group leaders who had little or no contact with OT staff, it is possible this resulted in lower levels of trust in National, contributing to the National-local tension as well as constraining both-and approaches to the transactional-transformational tension.

Second, responsiveness to the grassroots network and external political pressures can constrain both-and approaches. Grassroots leaders are, for the most part, new activists focused on mobilizing their communities against the Trump agenda. When political pressures such as proposed legislation, executive orders, or impending elections arise, group leaders

are inclined to jump into action. National, both out of a desire to respond to group leaders' needs and by virtue of National staffs' own desires to participate in those political moments, responds with the tools necessary for groups to mobilize. These tools, focused on rapid response efforts in the case of legislation or executive orders, and electoral tools in the case of elections, are oriented around transactional repertoires. Responsiveness thus pulls on the transactional pole of the tension and can encourage an either-or approach, minimizing or excluding transactional repertoires.

However, as discussed in the section above, local groups still have significant abilities to build community through transformational repertoires in their autonomous practices, mitigating the constraining effect. Groups like Landon's and Leslie's (and many others like them) brought transformational community building work into their transactional mobilization efforts.

Furthermore, as discussed above, transformational outcomes can result as unanticipated benefits from engaging in transactional work together, and this may be especially true in the case of transactional work occurring during especially fraught times. RU members shared with me that many of their deep relationships were outcomes of sharing emotional struggles—including the shared emotional aftermath of the 2016 election, but also periods of heightened emotion relating to political initiatives such as the nomination and ultimate confirmation of Brett Kavanaugh. By channeling the shared "trauma" and "devastation" of these events into a sense of shared struggle, group leaders can constitute a sense of community, as Leslie did in the example described above. This may mitigate the constraints of responding to the political context and enable group leaders to take a both-and

approach. Group leaders' autonomy in the hybrid context means individual groups are enabled and constrained differently.

Third, National-level pressures relating to professionalization can constrain both-and approaches. As discussed above, professionalization pulls toward transactional repertoires, in large part by requiring the organization to demonstrate legitimacy to donors in the form of quantifiable outcomes. The National branch of the hybrid organization exerts power to (re)produce structures that enable quantification, privileging the transactional pole. As many local groups in the hybrid organization take their cues from National and/or adapt to incorporate distributed structures like fundraising and VAN, the transactional pull filters out to local groups.

3. Role of the Organizing Team.

In the hybrid structure of RU, the Organizing Team plays an important role in shaping how members respond to the push-pull relationship between transactional and transformational repertoires. This was especially evident in terms of managing how the pull of professionalization is filtered to the local groups. OT staff face pressures from National to quantify their work, and several expressed to me that their job security seems implicitly contingent on demonstrating quantifiable outcomes. Those outcomes are only possible if local groups report quantified results to their OT contact. Getting reports of those numbers, however, can be complicated. As Ray described:

> Those of us [on the OT] especially who come from campaign organizing, we're very familiar with that style so when we see this kind of goal format laid out with all those figures, that pressure exists for us whether they intend for it to or not. For instance, door contacts, phone contacts, that's straight

> forward. Awesome, I can pull that. That's—absolutely, we need to track that. But, where you get into, like voter registration, leaders trained to lead an event, events on the map, leaders who are leading multiple events, whatever. You already start to lose control because there's not a formal reporting mechanism that exists there [in the group]. You can ask a group for these numbers; that doesn't mean you will get them in a format that you need them or that you would like them to be. For instance, I asked for voter registration numbers from my groups about a month ago, so I have a big number for my area—1,641 across my turf. That's just the people who responded to me with numbers saying, "This is how many we registered." But, if I go back to them now and say, "Hey! How many have you registered *since* then?" I don't trust they'll be able to tell me that, because I don't they're breaking it up like that. I don't think many of them are.

As Ray explains, OT staff face pressures both from National and, more concertedly, from their previous organizing experiences, that place the focus on quantifiable outcomes. However, hybridity means that groups have autonomy when it comes to implementing (or not implementing) formal accounting structures. Though groups do tend to count their contacts and other quantifiable outcomes, they do not have the same degree of formalized reporting that a campaign office would. The disconnect between formal and informal reporting that results from hybridity poses a challenge, and OT staff must negotiate that challenge in the context of their liminal position between grassroots and National.

The OT, by virtue of the degree of autonomy they have in the hybrid structure, also have the ability to resist professionalized logics. Natalie did so most explicitly, working with

her groups to participate in the local Pride event instead of an activity that would result in more quantifiable outcomes. However, she faced pushback from her supervisor and ultimately had to "salvage" that weekend by holding a last-minute text bank in order to produce the numbers requested by National. Natalie identified a direct opposition between transactional, quantifiable outcomes and other forms of community building and relational work, and experienced a great deal of tension when she perceived that she was asked to select only the transactional pole.

Other OT staffers use their autonomy more subtly, taking both-and approaches (somewhat similar to those taken by group leaders) that incorporate both transactional and transformational logics. Darin, for example, encouraged his groups to focus on engaging deeply with local marginalized communities, especially communities of color who have historically been explicitly or subtly disenfranchised in the political system. Darin explained:

> [When I worked on campaigns,] I was also really frustrated by the lack of understanding that campaigns target mostly white folks to vote, and that communities of color often get left behind… We don't spend enough time talking to marginalized communities. And campaigns, it's a cost-benefit analysis for them, you know. And when everything's on the line unfortunately the likelihood of them making the decision that's gonna lead them to the most votes is almost always the decision that they're gonna make. And so, one of the things that we try to explain in this training, and that we hope that RU groups are taking into account is that we should be talking to communities of color, and how we talk to them is just as important too. Showing up in their neighborhoods and saying, "you should vote because this is important" is not

> good enough. We need to understand what their issues are. We need to understand why they have chosen not to vote, and we need to actively work on the things that have made them decide that they don't want to vote. We need to work to remove those barriers.

Darin goes on to explain that the groups he works with are "doing the best they can," beginning to build relationships with constituencies of color in their local areas, taking steps like translating literature into multiple languages, and orienting their focus around mobilizing not just local communities but particularly local *marginalized* communities. This approach was oriented around both types of logics: transactional logics guided the focus on mobilizing voters and increasing voter turnout, while transformational logics guided the focus on building relationships and fostering connections between RU members and local marginalized communities. The latter required not only relationship building across groups but also internalizing the anti-oppressive values on which RU is focused.

Darin used his position to encourage that type of transformational anti-oppression work among his turf's group leaders, enabling a both-and approach using transformational logics to better orient transactional activities around RU's core values. He framed this as a critical way in which RU's efforts can differ—and improve upon—the efforts of electoral campaigns.

**Interactions Between Communicative Flows**

In RQ5, I ask about membership and structure interact, including (a) how organizational structure influences members' perceptions and constitutions of their roles, and (b) how members' perceptions and constitutions of their roles influences organizational structure. In RU, membership and structure interact in several ways. First, early structures in

the form of RU's guiding principles (set forth in the founding document of the *Guide*) shaped who would become a member (discussed in RQ1A). Second, constitutions of membership as *doing* and *becoming* influence the emergence of structures that facilitated enactment of members' roles (also discussed in RQ1A). This included the way membership as *becoming* anti-oppressive shape the reflexive structuring process of anti-oppression and bystander intervention training modules. Third, the reflexive self-structuring process triggered renegotiation of membership around new roles enabled by emerging structures. However, there were critical incidents in which reflexive self-structuring did not keep pace with emerging constitutions of membership; these incidents became a source of conflict.

As membership and structure interacted, reflexive self-structuring within different membership groups triggered self-structuring by other membership groups. Not only did reflexive self-structuring by National trigger self-structuring by local groups as they adopted new practices enabled by emerging distributed structures, but so too did reflexive self-structuring by local group leaders trigger reflexive self-structuring by National. This latter process was an important result of critical incidents involving resistance by local leaders.

1. Structure Shapes Membership.

As discussed in RQ1, the *Guide* provided a structure from which negotiations of membership emerged. By defining an activist, progressive "we," the *Guide* constituted membership in terms of *doing* activist organizing and *becoming* accountable to progressive values.

2. Membership Shapes Structure.

Based on this constitution of membership, new structures emerged to enable members to enact their roles. For example, distributed fundraising, endorsement procedures, and VAN

all represent structures that developed to enable group members to *do* activist organizing. Racial justice training and bystander intervention structures developed to enable group members to *become* accountable to progressive values.

3. Reflexive Self-Structuring by National Triggers Reflexive Self-Structuring by Local Groups.

Unsurprisingly in a hybrid organization oriented around *aligned decentralization,* the structures introduced by National triggered local groups to reflexively adapt and incorporate those structures. Some structures *required* groups to reflexively adapt if they wished to enjoy the benefits of new practices. For example, distributed fundraising, endorsement procedures, and VAN all required groups to adopt formal structures in order to participate in those activities. Fundraising and VAN both involve non-negotiable legal requirements relating to campaign finance law and nonprofit tax exemption statutes; endorsements involved formal practices laid out by National and standardized across all groups, such as evaluating a candidate questionnaire and establishing a threshold for approving an endorsement. In all three cases, groups could only benefit from the structures if the groups themselves formalized certain practices.

For other structures introduced by National, groups could simply decide whether or not to adapt. For example, when National adopted structures to train local groups in the snowflake model of distributed leadership, groups who were trained in that model often chose to reflexively adapt their own group structures to reflect the snowflake model. However, they were not required to. Some groups maintained the models they had used previously, such as boards of leaders. The autonomy of local groups enabled leaders to decide for themselves how to adapt those structures.

4. Reflexive Self-Structuring Triggers Re-Negotiations of Membership.

As group leaders learned to engage in distributed fundraising, endorsement procedures, and VAN, membership was renegotiated. By navigating fundraising, endorsements, and VAN, group leaders essentially participated in applied crash courses in campaign finance law, nonprofit tax law, and the U.S. electoral process. National provided expert advice, leading training sessions via webinar and in-person at the Regional Institutes. As members accrued the expertise they were offered, they, too, became experts—though of the non-professional variety. As members developed expertise in *doing* the political work, their empowerment in the political world translated to a desire for increased power in the organization.

The desire for increased power was fueled by a series of decisions by National with which group leaders were dissatisfied. Group leaders expressed the desire for greater input in three areas, each of which involved observations of the ways in which they did *not* have enough input: public-facing statements, internal decision-making practices, and allocation of resources. First, relating to public-facing statements, groups in Minnesota were dissatisfied with National's condemnation of Senator Franken, which occurred prior to consulting with group leaders; their experiences spread through informal channels to other groups, who saw the decision as a betrayal of grassroots leadership. Second, group leaders wanted greater transparency around internal decision making, such as whether or not to engage in a presidential primary endorsement. (Endorsements also related to the first area of public-facing statements.) Third, leaders became skeptical of the way resources were allocated. Several members of different groups mentioned to me the cost of flying staff—and sometimes group leaders—around the country for leadership retreats or days of action. One

group member (Renee) was stunned when National spent $900 to fly her to DC for a day of action, and commented that $900 to National may be nothing, but to a local group would mean a huge addition to their budget. The dissatisfaction emerging from these three areas led group leaders to actively seek out opportunities for increased decision-making power within RU.

Members seeking increased power within RU renegotiated their membership in terms of an accountability structure for National, directly translating their political expertise to the organizational context. As Leslie said at the 2018 California Summit, "It's like holding our [Congressional] reps accountable. We have to hold RU accountable."

RU members also renegotiated their membership around the idea of *becoming* anti-oppressive, one aspect of *becoming* accountable to progressive values. Through the anti-oppression training module at the Regional Institutes, many RU members were exposed for the first time to discourses of anti-oppression and anti-racism. These discourses were linked to *norms* of communication to emphasize the importance of adhering to the norms. Discourses of anti-oppression and related norms for communication contributed to negotiating membership around what it means to be anti-oppressive.

As new structures were implemented to enhance the anti-oppression mission—namely, bystander intervention training—membership was further renegotiated. Through bystander intervention, members formalized informal leadership, constituting membership as an active process of accountability. Here, reflexive self-structuring in the form of implementing bystander intervention training was done to intentionally shape membership around deep accountability. This critical incident shows the ways organizational leadership

can intentionally (re)produce structures that shape negotiations of membership in ways that are accountable to organizational values.

5. Re-Negotiation of Membership Triggers Reflexive Self-Structuring by Local Leaders.

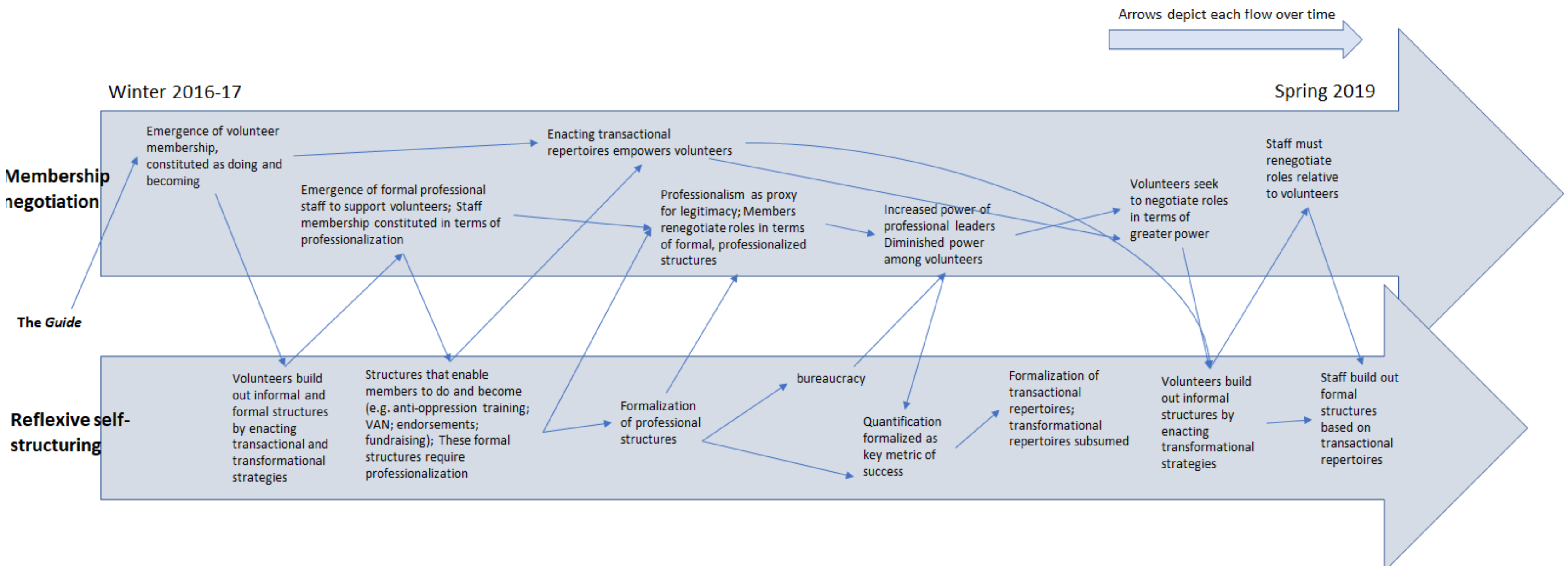
As grassroots members became politically empowered and (re)negotiated membership in relationship to National, grassroots leaders engaged in reflexive self-structuring to (re)produce structures enabling bottom-up leadership. Namely, leaders developed and built out the Meso Tier. Like bystander intervention training, the development of Meso Tier represents the (re)production of structures explicitly designed to (re)produce accountability to values—in the case of Meso Tier, the value of bottom-up leadership.

6. Reflexive Self-Structuring by Local Leaders Triggers Reflexive Self-Structuring by National.

Following the emergence of Meso Tier and increased calls by the grassroots for greater accountability to bottom-up leadership, data shows how National responded by engaging in its own self-structuring process. National developed and rolled out the CNA, designed to enable better communication between grassroots and National leaders. It appears to be a direct response by National to the re-negotiations of membership and reflexive structuring processes in which grassroots leaders engaged. This critical incident shows that resistance by grassroots leaders does matter. Even though CNA did not represent the structure envisioned by grassroots leaders involved in Meso Tier, it *does* represent an effort by National that was triggered by the grassroots.

In Figure 1 below, I provide a model of the processes by which the membership negotiation and reflexive self-structuring flows interact.

**Figure 1. Model showing the interplay between membership negotiations and reflexive self-structuring.**



## Summary

To summarize, the structuration processes of RU in both the membership negotiations and reflexive self-structuring flow were influenced by the transactional-transformational tension. As members (re)produced structure, hybridity emerged. Hybridity entailed the wedding of formal and informal structures as well as the emergence of multiple leaderships, including National and local. These hybrid leaderships converged around some meanings, but diverged around others, leading to tension. The tension between leaderships influenced how RU managed the transactional-transformational tension. Because National leaders had a tendency to (re)produce professionalized formal structures, the National pole of the leadership tension pulled toward transactional practices, which fit better with professionalized structures.

However, hybridity enabled grassroots leaders to resist, and resistance enabled members to maintain the tension between leaderships rather than having local leadership be subsumed by National. Data suggests that National responses to grassroots leadership were imperfect in the eyes of grassroots leaders. However, the imperfect responses may relate less to the individual motives of National staff, and more to the difficulty of maintaining flexible structures that are able to respond quickly to an increasingly empowered grassroots membership.

## V. Discussion

One question that spurred this project early on was *how are organizations (un)like social movements*? This question arose from noticing some similarities between RU's early structures and the structure of social movements. As RU formalized, it became more clearly *not* like a social movement. However, the question of similarities and differences poses an interesting direction for research as organizations increasingly hybridize, merging formal and networked structures into forms that in some ways do reflect movement structures.

This study examined the process of formalization by which RU shifted from a structure that did constitute a social movement to one that instead constituted a civic organization. A number of interesting findings emerged, presented in the previous chapter, that I will discuss in greater depth here. Following an overview of the findings, I discuss theoretical and practical implications of the study. Theoretical implications relate to the transactional-transformational tension; hybridity and the imbalance between structural types in RU, which I term *imbalanced hybridity*; the impact of professionalization, including on the emotional work involved in activist organizing; the potency and potential of resistant behavior in the context of a resistance movement; and the ways communicative flows constituting the organization interact and influence one another. Practical implications include the barriers to producing innovative new structures, the need for organizations focusing on member empowerment to consider structural flexibility in order to accommodate increased empowerment over time, challenges relating to the structure of distributed networks, ways organizations might think about critical incidents at the system level as catalysts for membership development at the organization level, and implications of tapping into traumatic emotional experiences while organizing.

Finally, I discuss limitations of this study that provide opportunities for future research and elaborate on several areas for further inquiry in the area of hybrid constituent-based organizing. I identify areas with strong potential for further exploration including the use of concertive control in distributed networks, touching on both the potential positive and negative impacts of that type of control; the use of narrative as an organizational strategy to manage strategic ambiguity; the impact of collective trauma on organizational identity, especially in organizations and movements responding directly to collectively traumatic events; and, finally, the potential to identify similarities and differences between hybrid organizations and social movements that would enable scholars to build bridges that would enrich both areas of study.

### A. *Overview of Findings*

My first research question inquired about how the push-pull tension of transactional and transformational logics influences membership negotiations and reflexive self-structuring. With regard to membership negotiations, data suggested that grassroots membership is rooted in *doing* (transactional logics) and *becoming* (transformational logics); membership is thus constituted through a both-and combination of the logics. The *doing* of membership involves taking action to advance progressive policies, which also involves *becoming* accountable to progressive values such as anti-oppressing. The becoming process is oriented around growth rather than achievement, with a focus on willingness to learn rather than degree of "wokeness" achieved.

A central focus of membership negotiations was the negotiation of leadership, and leadership was constituted differently at the grassroots and National levels. At the grassroots level, leadership involved a process of *becoming* a leader through personal growth, which

then enabled the *doing* of leadership practices such as enabling others to develop as leaders. Here, again, both transactional and transformational logics underpin the constitution of leadership. Leaders are responsible for mobilizing others using transactional logics but must *become* leaders by engaging in the development process. Interestingly, while leadership development is often thought of as an intentional, transformational process in constituent-based organizations (Han, 2014), in RU, members commonly *became* leaders through participating in transactional mobilizing. Though some leaders held formal positions, such as members of steering committees or other named roles, other leaders did not hold formal positions but rather were leaders by virtue of their leadership practices.

At the National level, leadership was constituted by a strong pull toward transactional logics. This was in part due to the National leadership's purpose of increasing coordination among groups by providing logistical support in return for ongoing involvement, which is rooted in transactional logics. That pull toward transactional logics was strengthened by the constitution of National leadership as *professionalized*, involving logics of rationality and bureaucracy. Professionalization shaped how RU functioned. One key implication of professionalization was the shift toward quantifiable markers of success that could be used to appeal to philanthropic donors. Quantifiable measures can easily capture activities guided by transactional logics, such as mobilizing voters, but are less compatible with the relational work guided by transformational logics. Professionalism thus created a strong pull toward transactional logics and caused frustration for members whose transformational work could not be quantified. While both National staff and some group leaders saw professionalism as a marker of legitimacy, discourses of professionalization may have the unintended

consequence of *de*-legitimizing non-professionalized volunteer leaders and leaving those leaders' expertise untapped.

In the reflexive self-structuring flow, structures emerged and were (re)produced to facilitate both large-scale member mobilization (transactional logics) and membership sustainability (transformational logics). However, there was a strong pull toward the transactional pole of the transactional-transformational tension as early influences reverberated throughout the self-structuring process. The RU *Guide*, the urgency of emerging political issues, and the trend toward professionalization all contributed to this pull. While members discursively positioned transactional and transformational logics in opposition and approached the tension from an either-or perspective in many areas, members took a both-and approach to recruiting and retaining new leaders. Namely, recruitment and retention trainings were focused on both increasing a group's capacity through transactional logics and increasing sustainability through transformational logics. According to members, increased sustainability related significantly to the depth of informal relationships developed among members. Those deep relationships, however, could not be quantified, and metrics for success remained focused on transactional outcomes.

Research question two asked about how the transactional-transformational tension related to the (re)production of formal, informal, and hybrid structures. Data suggested that formal structures were produced by, and in turn reproduced, either-or approaches to the transactional-transformational tension, emphasizing the transactional pole. Transactional strategies of mass mobilization and involvement necessitated formal structures in order to coordinate quickly and efficiently. Such structures like distributed fundraising, endorsements, and VAN, were rooted in transactional logics and also required increased reliance on

professionalization, further strengthening the pull of transactional logics. In contrast, informal structures were more likely to be (re)produced by and facilitate both-and responses to the tension. As RU developed, it was common for informal structures to become formalized, contributing to an overall trend toward formalization.

To the extent that informal structures persisted, they offered members a variety of benefits relating to transformational logics. Mainly, members found informal relationships to be deeply beneficial, providing the emotional support to help maintain long-term involvement. Informal structures also facilitated transformational leadership development as members grew and developed into leaders, and relational structures enabled members to shape organizational structure in meaningful ways. However, informal relational structures were unevenly distributed; staff, in particular, developed close relationships with a select few grassroots leaders, and those leaders benefited greatly in terms of their ability to influence the organization. Other members experienced exclusion, and this caused a degree of strain between National staff and some grassroots leaders. Thus, informal structures privileged existing relationships.

Hybrid structures incorporate both formal and informal structures, and both transactional and transformational logics. RU called its form of hybridity *aligned decentralization*, and employed the strategy to allow groups to act relatively autonomously while still being guided by the central tenets and ethos of the organization. In RU, however, hybridity tended to pull toward formality, with informal structures operating as subordinate to formal ones. This had implications for the types of work done in the organization, as transformational logics were employed largely to facilitate transactional work. Transactional logics governed, with transformational activities employed in service to mass mobilization.

The presence of multiple leaderships, including professional staff and volunteer group leaders, resulted in a tension between those leaderships. In the third research question, I ask about how that tension influenced (a) the membership negotiations flow and (b) the reflexive self-structuring flow. I focused my examination of membership negotiations around negotiations of leadership, exploring the relationships between national and local leaders. When meaning converged around the roles of the multiple memberships, the relationship could be generative, and convergence led to (re)production of hybrid leadership by which the roles of the two leadership groups complement one another.

When meaning diverged, however, conflict emerged. Members contested the question of who leads the leaders, with some volunteer leaders sensing that their work was devalued or delegitimized by staff leaders. Volunteers were not always given the opportunity to voice their opinions before decisions were made, including prior to the condemnation of Senator Al Franken and throughout the decision-making process about national-level presidential primary endorsements. Contestations of leadership influenced membership negotiations, with some members constituting themselves as insiders and others as outsiders within.

Convergence and divergence similarly influenced the reflexive self-structuring process, with convergence around the roles of various membership groups in (re)producing structure resulting in a generative effect, and divergence resulting in conflict and fragmentation. Convergence occurred around understandings of the roles of grassroots and National leaderships constituting an inside-outside strategy, the role of grassroots leadership as responsible for (re)producing local group structures with support and resources provided by National, and some agreement around the role of volunteer leaders in helping to determine

National-level agendas. In these areas, the leaderships were able to work together constructively and (re)produce hybridity.

Divergence occurred as grassroots leaders sought to exert greater power in (re)producing organizational structures. This was most starkly evident in a critical incident involving two parallel structures: the Meso Tier, created by volunteer leaders, and the CNA, created by National staff. Though both structures were designed to address similar goals of facilitating grassroots input, in the Meso Tier, power was distributed among volunteer members, while in the CNA, power was concentrated more heavily with National staff. The decision of National to build out the CNA instead of actively supporting the member-led Meso Tier became a source of conflict, as the CNA created a stronger pull by National leadership.

I further explored the tension among multiple leaderships in part A of the fourth research question, which inquired about how hybridity enables and constrains both-and approaches to the leadership tension. I found that hybridity enabled both-and approaches through the paradoxical situation of aligned decentralization. However, the pull toward formal, professionalized logics constrained those approaches, leading members to respond by resisting or even exiting the organization. When local leaders resisted, hybridity enabled them to draw on informal structures to exert power. This enabled local leaders to maintain the tension with National rather than becoming overpowered or subsumed.

Hybridity also enabled groups to negotiate the tension between formal and informal local leaderships. In particular, the snowflake model of local group leadership enabled both-and approaches through which formal and informal volunteer leaders complemented each

other's roles. In contrast, groups that used more bureaucratic models were constrained, with formal leadership taking the center stage.

Data suggested that the organizing team played a key role in negotiating the leadership tension. Functioning as a meso-level between the centralized National structure and decentralized volunteer leaders, OT staff negotiated their role around facilitating communication between the different levels. In some cases, OT staff were able to help local leaders with whom they had deep relationships pull toward the local pole of the leadership tension, enabling group members to exert power and voice. However, OT staff were also constrained by the huge swaths of turf they were assigned, each including hundreds of group members with which a staff member was responsible for liaising. These ratios made it difficult for staff to develop the deep relationships that contributed to helping group leaders exert power.

Hybridity also enabled and constrained both-and approaches to the other key tension in RU: the tension between transactional and transformational logics. Here, the autonomy of local groups was key. Group leaders were able to develop innovative tactics that drew on both transactional and transformational logics, and apply these tactics in ways that were beneficial to the unique situations of their local groups. They were also able to share the tactics they found most helpful, and in doing so, ideas spread not only from National to the local groups but also among the groups themselves.

Still, various pressures functioned to constrain both-and approaches to the transactional-transformational tension. Data suggested that large-scale involvement, responsiveness to networked members and political pressures, and National-level pressures

relating to professionalization constrained members' abilities to negotiate the tension in ways that balanced or integrated both poles.

Again, the organizing team had an important role to play in negotiating this tension. OT staff face pressures from National to quantify their work, which is only possible when OT staff encourage their group leaders to report their successes in quantifiable terms. The pressure to quantify success places an emphasis on transactional logics, which are more easily quantifiable than are transformational logics. Still, some OT staff worked hard to use both-and strategies, such as incorporating transformative anti-oppression frameworks into transactional voter outreach efforts.

Finally, I asked in the fifth research question about how membership and structure interact, including how membership negotiation influenced reflexive self-structuring and vice versa. In RU, there were several forms of interaction. First, early structures such as RU's *Guide* shaped who would become a member. Second, constitutions of membership as *doing* and *becoming* shaped the emergence of structures that facilitated enactment of those roles, such as shaping the self-structuring process of anti-oppression trainings to facilitate *becoming* anti-oppressive. Third, reflexive self-structuring processes led to renegotiations of membership around new roles enabled by emerging structures, such as developing expertise in campaign finance rules in order to take advantage of VAN access.

I turn now to a discussion of the theoretical and practical implications of these findings.

### B. Theoretical Implications

1. Transactional and Transformational Repertoires.

In this study, I build on earlier research about transactional mobilizing and transformational organizing (Han, 2014) by situating the two repertoires in tension. I do so because activists and organizers engage in their work in a context of limited resources—including limited time, limited financial resources, and limited people-power. Within these constraints, activists must choose where to place their focus: scaling up, often quickly, or building deep power that can persist over time and through hardship. The two logics are complementary—successful movements tend to involve both—but are in tension by virtue of the fact that engaging in one, at a given moment, often seems to be at the expense of the other.

In RU, members perceived the logics to be in tension, and the way members negotiated the tension had implications for how they engaged in their work. Especially impactful was the way RU drew on the different logics early on, which shaped the way the tension between those logics played out in the longer term. This is in line with Blee's (2012) finding that the early, formative stages of an activist group have serious long-term implications. It is critical for organizations to take time early on to reflexively and intentionally (re)produce early structures, even as other pressures push members to move quickly in response to urgent problems.

Findings from RU support the notion that the early, formative stages mattered, reverberating into the future as time progressed. Early on, RU operated almost wholly transactionally, with the original *Guide* focused virtually exclusively on transactional activities. This made sense in the moment: facing an incoming presidential administration unlike any in recent memory, the inclination was to mobilize massive, large-scale involvement as quickly as possible to mitigate the harms promised by that administration;

RU was not alone in publishing similar guides for action, and the progressive constituency was highly motivated to take the sort of action proscribed by the *Guide*. Still, the transactional focus was not without implications.

As RU developed from a distributed network into a more organized structure, members envisioned the Regional Institutes as a way to incorporate transformational organizing strategies such as public narrative and relationship building into the RU repertoire that already included transactional strategies like mobilizing protests and phone banks. In other words, the Institutes were a promising site to introduce both-and approaches to the tension, connecting and integrating tactics and strategies that drew on both types of repertoires. However, challenges emerged, including members' ingrained patterns of work, staff members' previous experiences, and the logics of professionalization.

First, the transactional focus resulted in (re)producing structures that were suited to transactional outcomes; transactional logics were ingrained in members' notions of what it was that RU was doing. Taking time to recruit and develop new leaders, or to engage in community building activities, felt to members like taking time *away* from the core mission of mobilization. This sense that transactional and transformational logics were in tension was in the discursive consciousness of members: they named it and recognized that the tension was in many ways a constructed one, but nevertheless it was something with which members grappled.

One reason why it may have been challenging to incorporate transformational repertoires is that transactional mobilizing is, in many ways, much easier and more easily rewarded than transformational organizing. Part of the reason for this is that the results *are* often quantifiable, and therefore members who participate in mobilization activities have a

more immediate, concrete outcome to celebrate. It may feel like a much greater accomplishment to boast that a group made fifty phone calls to Congress or wrote one hundred postcards; there is not the same ring to saying, "we took time to have deep conversations, get to know each other better, and develop relational bonds that we think will endure for some time."

The outcomes that can be tied to mobilizing are similarly more concrete than those tied to transformational organizing. RU narratives frequently included cause-effect patterns such as "we made X number of contacts with members of Congress, and as a result we prevented/achieved Y legislative effort." In this way, the impact of transactional activities makes sense; that sense is made through quantitizing rather than qualitizing results. Transformational outcomes are harder to measure and may take longer to notice; they relate to the qualities of a leader and of relationships rather than to easily quantifiable outcomes. For example, after two years of organizing, Isabel was able to identify that her long-term involvement in RU was thanks in large part to the deep relationships she had cultivated with her fellow members; but it was only thanks to time that she could acknowledge this. The ability to endure over time and through hardship is profound, but difficult to pinpoint early on and thus does not provide the same positive feedback loop as do concrete transactional activities.

Thus, when faced with limited time and resources and the pressing need to act in the face of urgent political developments, it makes sense that members would be inclined to take the sorts of actions that can result in concrete outcomes. For example, many groups—especially those in Republican states or districts—were mainly focused on electoral organizing, which is heavily transactional. They believed that without winning upcoming

elections, they would be unable to accomplish larger policy-oriented goals. A contrasting view, presented by the few organizers who were more driven by transformational logics, would be that when groups engage in deep transformative work, electoral victories follow and change can be more enduring. This latter view takes a more integrated both-and approach, while seeing elections as a necessary prerequisite to other changes represents a sequential approach.

This is where experienced political organizers could have a clear and important impact: training novice activists about the importance of employing both transactional and transformational strategies and reframing common goals like electoral victories in the context of larger values-based goals around social change. While the Regional Institutes were designed to do just that—bring in experienced organizers to train cohorts of novice activists—the previous experiences of the training team influenced how that mission played out. The training team at the first Regional Institute was led by an outside consultant with extensive experience in deep, transformational organizing as well as transactional mobilizing. That consultant and his team trained the RU Organizing Team on how to lead the Institutes, and during that trainer training the consultant and his team pushed strongly *against* a focus on electoral politics; they advocated for the more integrated approach in which electoral politics are only one manifestation of social change, rather than a necessary prerequisite.

However, that integrated approach did not take hold, likely for two reasons: the previous experience of the Organizing Team and—ironically—the focus on grassroots leadership. First, the OT was constituted almost entirely by people with extensive previous experience staffing electoral campaigns. Their repertoires of practice were rooted heavily in electoral strategies which, again, are heavily transactional. This resulted in a disconnect,

which was evident during the training as the consulting team pushed facilitators to encourage groups to focus on non-electoral goals, but the facilitators themselves (who were members of the OT) struggle to conceptualize what those goals would look like and translate them to group leaders.

Furthermore, the idea that RU was led by the grassroots ironically created a challenge when it came to incorporating deeper transformational work. In the chaos of late 2016 and early 2017, activists across the United States were thirsty for outlets and for guidance on how to take part in the resurging progressive movement. Through online searches, they found a number of options, and it would seem that they signed up to be involved with the groups that best reflected the type of work they wanted to do. This is supported by the several members who shared with me that they first signed up for or attended an RU meeting after discovering the *Guide* and finding the *Guide* to be more accessible and practical than the political action manuals shared by other organizations. RU was thus constituted by members who were attracted to the type of activism work laid out in the RU *Guide*, and the *Guide* laid out an activist map that was oriented around transactional activities. Thus, baked into the grassroots of RU was a transactional focus. When put in a position to lead, those members led from a perspective of transactional work.

The Regional Institutes were designed to bring a both-and approach, training grassroots members on how to incorporate transformational repertoires alongside transactional ones; however, the constructivist nature of the training meant that grassroots members' input was privileged, and members' opinions and experiences were used to frame the training modules. When brainstorming ideas during sessions, for example, trainers would ask questions such as, "what works?" Participants would respond with what they understood

to be working—and because they had been engaging in largely transactional work, those were the types of answers that emerged. These brainstorming sessions skewed ideas about what works, what victories members were most proud of, and what goals members had—all of which were oriented around existing repertoires, rather than projecting to incorporate new repertoires. This is a potent example of the duality of structure by which organizational structures function as both means and outcome of interaction.

Here, an important contradiction emerges relating to grassroots leadership. At the heart of RU's ethos is the value of bottom-up leadership by the grassroots. Findings show that members did not always perceive the organization to live that value, and there were important critical incidents belying the bottom-up vision. However, when the value *was* upheld through action, it was not always to the benefit of members' growth. Thus, a contradiction emerged between the process-oriented value of grassroots leadership and the goal-oriented value of having the strongest possible impact.

The process-oriented value of grassroots leadership, when reflected in organizational practices, was itself ironically problematic. Because grassroots activists in RU were largely novice activists when beginning their involvement, they simply did not have the skills, experiences, or knowledge to approach grassroots organizing in highly effective ways—and they were well aware of this. Still, during the constructivist, interactive trainings, the input from volunteer leaders skewed sessions toward transactional discourses and practices. Volunteers were eager to engage in activities that they perceived to have a meaningful impact, but those preferences were limited by the extent of volunteers' experiences and often focused on electoral work. This makes sense due to the visibility of electoral approaches in the mainstream. This finding builds on current theorizing around member empowerment and

participation by identifying the ways member participation can (re)produce existing structures, unintentionally stunting those very members' growth.

Rather than work to expand the repertoires of volunteer leaders, staff often—due to their own experiences in electoral organizing—fueled that push toward those kinds of strategies. Thus, RU's repertoire of practice was well suited to the transactional electoral realm, but did not necessarily take a both-and approach to the transactional-transformational tension, and as a result may not be as well suited to deep and enduring political action. RU's approach was ultimately limiting, and this was ironically due in part to the fact that RU *did* seem to follow the preferences of the grassroots for what types of activities in which they wished to engage, rather than working to expand those preferences.

It is interesting that RU engaged in more bottom-up leadership in some areas as opposed to others. For example, RU did seem to listen to members when it came to their goals, as RU's goals over time seemed to reflect the goals that members expressed early on—namely, electoral ones. However, RU was less responsive to members' desires to have greater influence over organizational structure beyond the groups in which members were directly embedded. Though RU did respond to the desire of increased coordination of groups, that response was notably marked by the critical incident of the Meso Tier, which suggested limits to the structurational power of grassroots leaders. The Meso Tier incident suggested that RU staff were reticent to support an emergent structure in which staff voices would be minimized. By supporting bottom-up leadership in limited contexts such as framing training sessions, but not in more substantive cases such as developing major organizational structures, staff exerted control to channel grassroots energy in service of managerial interests and constrained more substantive efforts at distributed leadership.

2. Repertoires and Power in RU.

By responding to grassroots leadership that pulled toward strategies and repertoires with which RU staff were familiar and comfortable, but pushing back on efforts by the grassroots to engage in more substantive organizational structuring, RU suggests something about its own approach to power—namely, that it may approach power differently within and outside the organization.

Lukes (2005) presents a three-dimensional view of power, with each dimension building in complexity: the one-dimensional view has a behavioral focus, the two-dimensional presents a qualified critique of the first, and the three-dimensional view proposes an alternative approach to the behavioral perspective. The three views map on to three different approaches to strategizing around power. The one-dimensional, or pluralist, view of power "involves a focus on behavior in the making of decisions on issues over which there is an observable conflict of (subjective) interests, seen as express policy preferences, revealed by political participation" (Lukes, 2005, p. 19). This view of power sees conflict and expressions of interest as policy preferences. It is oriented around expressed behavior and overt conflict. Some of RU's strategies, including those focused on policy debates and electoral contests, are rooted in the first dimension of power.

The two-dimensional view, initially put forth by Bachrach and Baratz (1970), problematizes and extends the behavioral focus of the one-dimensional approach by considering the ways in which decisions are kept from the public arena. Both decision-making and nondecision-making, are addressed. Power may be used to influence values or political procedures in ways that limit the scope of decisions or prevent decisions from coming to the table at all (Lukes, 2005). As stated by Bachrach and Baratz (1970), "to the

extent that a person or group—consciously or unconsciously—creates or reinforces barriers to the public airing of policy conflicts, that person or groups has power" (p. 8). Some of RU's strategies are also rooted in this view, including external and internal strategies. External strategies taking the two-dimensional view again include policy debates, such as attempting to prevent consideration of certain harmful measures proposed by Trump or the Republican leadership.

Internally, RU National has the type of power described by Bachrach and Baratz (1970) as the ability to consciously or unconsciously create or reinforce barriers to the airing of conflicts. Namely, National can (perhaps unintentionally) prevent conflicts over internal policy, such as member involvement in decision making. RU may also check that power and invite some degree of conflict. For example, RU may channel discontent around an issue like endorsements into a simple survey by which members weigh in on whether or not to endorse. This type of invitation for conflict sets limits on the setting, inviting a degree of disagreement without opening a forum for full debate and discussion of the policy proposal.

Believing the first and second dimensions to be insufficient explanatory mechanisms, Lukes (2005) presents a three-dimensional view that considers how power may keep fundamental issues out of the political realm altogether. This requires an examination of latent conflict as well as observable conflict. Latent conflict is the contradiction between the interests of those exercising power and the real interests of those who are excluded from power. Those with power exercise influence to suppress the expression, or even recognition, of fundamental conflicts. Lukes boldly claims that real interests may not even be consciously held but are nevertheless empirically measurable. Thus, in Lukes's conception, "A exercises

power over B when A affects B in a manner contrary to B's interests" (p. 37), even if B's perceptions have been shaped by A such that B believes A has B's best interests at heart.

RU incorporates the third dimension of power into some strategies but not others. For example, RU exercises the third dimension in the context of anti-oppression work, with white supremacy representing the sort of empirically measurable but suppressed fundamental conflict that manifests across western society. RU members also promote political education as a way to surface real interest and shift latent conflict into overt conflict. However, the third dimension of power is not necessarily exercised with regard to National-local power dynamics. By professing grassroots leadership, RU National may (unintentionally) erase the power struggle inherent in its own structures, relegating such conflict to latency. I discuss this erasure of conflicting interests further in the section below about professionalism as a proxy for legitimacy.

3. Hybridity and Negotiating Tensions.

This project explored hybridity as a structural form with the potential to enable members to negotiate tensions and paradox, as suggested by Jay (2013). Hybridity has been thought to improve organizational performance by combining bureaucratic forms with structures more suited to flexibility and empowerment (Drucker, 1988; Gittleman et al., 1998). Yet hybridity can also result in imbalance.

RU represents a sort of feminist-bureaucratic hybrid by combining hierarchical and egalitarian power structures (Ashcraft, 2001). The formal structures of RU National represent a more hierarchical form, while the distributed grassroots network is organized based on principles of egalitarianism and community empowerment. These structures are brought together under the strategy of *aligned decentralization*, which is a form of what Ashcraft

(2001) calls *organized dissonance*. Organized dissonance is “the strategic union of forms presumed hostile” and “entails the active use of contradiction” (Ashcraft, 2001, p. 1304). As Ashcraft notes, joining hierarchical and egalitarian power structures “implies that hierarchy can be enacted in ways that alter its usual meanings, but that premise rests on a deeper one—that bureaucratic structure and feminist practice stand on equal footing. Yet the latter assumption seems particularly suspect” (p. 1304).

Findings from the present study validate Ashcraft’s (2001) skepticism of the proclaimed equality between hierarchical and egalitarian structures in hybrid organizing. Though RU National claimed the organization to be led by the more egalitarian grassroots structure, in practice, hybridity involved a power struggle between National and local groups in which National staff were able to exert greater control. This builds on existing research about the contradictory nature of hybrid power structures, extending research to structures in which there are not only multiple power structures but also multiple leaderships.

Data provided some insights into *why* and *how* the National hierarchy ultimately exerted greater control even when individual members of National seemed genuinely committed to grassroots leadership. Namely, the way formal and informal structures were (re)produced in the hybrid context likely contributed to the concentration of power in the formal National structure. Data suggested that the informal structures enabling greater empowerment and distributed decision making were (re)produced as subordinate components in service to formal structures.

The subordination of informal structures to formal ones also influenced RU’s repertoires of practice, and those repertoires in turn influenced structures, creating a cycle of (re)production. Illustrating the ways that the formal-informal tension and transactional-

transformational tension overlap and intersect is a key contribution of this study. Informal structures enable greater empowerment in part due to their greater focus on transformational repertoires, while formal structures were strongly related to transactional repertoires. Like in/formal structures, repertoires were also in a dominant-subordinate relationship, with transformational repertoires employed in service to transactional ones: transformational activities such as relationship building and leadership development were mainly used to support more widespread mobilization. RU members thus privileged transactional repertoires over transformational ones, and as they employed those logics, they (re)produced a structural form in which formality dominated.

RU thus embodies a form of imbalanced hybridity. While both formal and informal structures were present, formal structures dominated, and informal structures either became formalized or (re)produced as subordinate to formal ones. In many ways, this outcome is not surprising. Existing literature shows that efficiency and growth in a competitive environment tends to result in the (re)production of formal hierarchies and, consequently, to undermine informal and egalitarian structures (Maguire & Mohtar, 1994; Murray, 1988; Riger, 1994; Pfeffer & Salancik, 1978; Staggenborg, 1988). However, even if not surprising, it is concerning for organizations that aim to promote member empowerment.

In RU, the imbalance of the hybrid structure was exacerbated by professionalization. Following a discussion of intertwining tensions, I will turn to a discussion of the impact of professionalization; I return again to tensions in the section on practical implications where I discuss ways in which organizations may manage or mitigate the impact of formalization.

4. Negotiating Intertwining Tensions

In RU, the three tensions discussed in this dissertation—formal/informal, professional/volunteer, and transactional/transformational—became intertwined. For example, professionalization required formalization of certain professionalized practices such as fundraising structures. Professionalization also enhanced the pull of transactional logics because transactional repertoires are more easily quantifiable as metrics of success that can be represented to funding agencies. Furthermore, like professionalization, transactional repertoires are rooted in market-based logics of success. Metrics for success that quantified transactional activities then became formalized, linking to the third pole.

On the opposing end, the informal, volunteer, and transformational poles were also connected. Volunteer leaders generally held informal roles, at least at the outset, and their roles remained more informal (if not entirely so) than those of professional staff, whose roles are firmly formalized. Volunteers also tended to operate in *more* informal (again, if not entirely so) group structures relative to professional staff who operated in the increasingly bureaucratic National structure. As they built out their group structures, volunteers underwent transformation, resulting both from transformational relationship development and personal growth. Volunteer leaders' roles were predicated on transformative experiences, linking their involvement more closely (relative to professional staff members' involvement) to transformational work.

In these ways, the formal, professional, and transactional poles became linked or knotted, and the tensions overlapped in ways that resemble a three-strand braid (shown in Figure 2).

**Figure 2.** Model showing tensions as intertwined in a braid.

Though I am not suggesting that these tensions are necessarily inherently linked in this way or that the relationship between them was inevitable in RU, data does suggest that the poles became connected and the tensions intertwined in significant ways. The three-strand braid model is a helpful illustration. Since the ends or poles of those strands were connected to each other and the strands of tension intertwined, pulling on one pole of one tension also meant pulling toward the corresponding poles of the other tensions. For example, pulling toward professionalization also meant pulling toward formal structures and transactional repertoires, and pulling away from the opposing poles of not only volunteer leaders, but also away from informal structures and transformational repertoires.

This model offers an interesting avenue for negotiating tensions by suggesting that there is more than one way to pull toward the poles of a given tension. That is to say, there may be promise in the ability to indirectly pull toward a pole by pulling toward the corresponding pole of an intertwined tension—especially in the case of a corresponding tension that represents agents in the organization. For example, if there is a need to pull more strongly toward transformational repertoires or informal structures, an effective way to do so may be empowering the agents associated with the volunteer end of the corresponding leadership pole—empowering the volunteer leaders themselves. For example, data suggests

that as volunteers exerted agency and pulled toward their end of the leadership pole, they also pulled toward transformative work and informal structures (demonstrated in the case of the Meso Tier). This strategy may better enable the negotiation of tensions by emphasizing the role of agency, rather than attempting to pull toward a more abstract pole relating to repertoires or structure.

Thus, I propose that an avenue for negotiating wicked problems in an organization like RU involves identifying interrelated tensions, mapping the relationships between poles, and identifying whether there are corresponding poles. If so, actors can operate more reflexively knowing that, by pulling on one pole of one tension, they will also manipulate related tensions. This can enable both more reflexive activity and, potentially, deliberate organizational change if actors can take advantage of certain interrelationships like the linkage between volunteers and transactional repertoires. In short, the relationships between tensions may present a potential mechanism for bringing about organizational change.

5. Professionalization as a Proxy for Legitimacy.

The formalization process of RU was characterized by professionalization, a type of formalization. Professionalization in RU served as a proxy for legitimacy, which makes sense considering that bureaucracy tends to privilege professionals (Acker, 1990; Ashcraft, 1999; Pringle, 1989). Still, professionalization had a number of consequences for RU, including an impact on how members negotiated the transactional-transformational tension and how members negotiated their own membership and involvement. In this section I will discuss those impacts, including implications for how emotions are accounted for in grassroots organizing.

The challenge of incorporating transformational logics was exacerbated by professionalization. Both grassroots members and National staff perceived professionalism as a proxy for legitimacy. They saw emerging professional structures, such as the hiring of National staff, as a sign that RU was really "becoming something," and contrasted RU's professionalized structures with the non-professionalized structures of other, "scrappier" activist groups.

Professionalism as a proxy for legitimacy resulted in the (re)production of formal structures that used professionalized logics to measure success. Using the logic of professionalism, "real work" was conceived of as work that could be quantified and tracked. This quantification of success pulled RU toward transactional logics, which are far more easily quantified than are transformational logics. Since transformational outcomes, such as the deepening of relationships or increased sense of community, are much harder to track using numbers, those logics did not operate as well in the professionalized model, contributing to their subordination.

Professionalism in a hybrid organization brings an added problem: hybridity is contingent on multiplicity and the distinction between multiple (formal and informal) components of the organization. When one part of the organization—the formal, professionalized arm—is viewed as legitimate *by virtue of its professionalism,* the other, informal component is devalued and delegitimized in contrast. As a result, the reification of professionalism as a marker of legitimacy in RU had serious implications for the role of members. As Lindsey, Annette, and other members noted, for example, there was a vast trove of potential among group leaders who had the expertise to fill National-level needs but whose skills were left untapped. The reliance on formal expertise held by staff members left

the informal expertise of group members sidelined, even when expertise would be considered formal in another context (e.g. a professional marketer whose role in RU is that of a volunteer). The untapped potential of group leaders seeking to have greater input in the organization—whether it was using their multimedia skills or developing networks of leaders—belied the claim of bottom-up, grassroots leadership.

Formal leadership, like formal expertise, was privileged over informal leadership. The Meso Tier is a prime example. While Meso Tier appeared to be an effective structure for leaders to network and coordinate across states, the structure was delegitimized by National staff as a "clique" and National staff failed to engage substantively and constructively in supporting the Meso Tier. The parallel CNA structure, on the other hand, was legitimized due to its formal, professional leadership. Discourses of professionalization-as-legitimacy employed by members in the practice of organizing thus undermined the values-oriented aspirational discourses of empowerment. Despite a vision of bottom-up, distributed grassroots leadership, members' practices revealed a far more complex situation in which the pressures of the organizing context and the assumptions of members about (il)legitimacy shaped structures in ways that ran counter to that vision.

Despite the privileging of formal leadership over informal, members—especially National staff—continuously claimed that informal leaders were equally or even more valuable than formal ones. This dynamic was similar to that found by Ashcraft (2001) in her study of a feminist bureaucratic domestic violence shelter employing *organized dissonance* somewhat similar to RU's, albeit on a smaller scale. Ashcraft found in that organization, "all members were supposed to participate as equals in the midst of evident inequalities and centralized authority—at once enacting and suppressing power imbalance" (p. 1307). In RU

as well, discourses of distributed leadership upheld perceptions of equality even as equality was undermined in practice. Following a discussion of emotionality in formal, professionalized contexts, I will return to this contradiction and discuss the ways members of RU responded.

6. Emotionality in a Professionalized Context.

By relying heavily on rationality, professionalism has a tendency to sideline emotions (Acker, 1990; Ashcraft, 1999; McCallum 2012). This tendency has especially strong implications for organizing work like grassroots activism that is heavily reliant on emotionality. According to members, emotions played a key role in grassroots involvement, from the rage and despair that drove them to seek out activism in the wake of the 2016 election to the comfort and joy they found in the friendship networks that emerged among local group members and the sense of victory and political empowerment brought about by engaging in—and sometimes winning—electoral and policy campaigns.

Emotions are also key to transformational repertoires: emotions provide the foundation for relationships to emerge and develop, making them foundational to relational organizing practices. Specific practices employed by RU that draw heavily on emotions are the public narrative, in which members share stories about how they became involved in organizing and connect those stories to narratives of community and urgent political issues; anti-oppression training, which draws on empathy and compassion for those with different life experiences than one's own; exercises like the one Leslie shared in which members envision how they want to feel after the next election; and protest events, in which emotions are channeled into public displays of political power. In short, emotions give heart to much of the work in which RU is engaged.

Grassroots organizers in RU commonly referred to this type of emotional organizing as "heart work." In RU, heart work could be intense: it was not uncommon for participants to cry together during trainings, while sharing portions of their own public narratives, during the anti-oppression training, and during the heartfelt close-out sessions in which participants discussed the parts of the training that were most meaningful to them.

It is worth exploring, then, the role of emotions in an organization like RU, and to consider the implications of professionalization on this emotionally-laden work. First, I would like to distinguish the "heart work" of grassroots organizing from the construct of *emotional labor* (Hochschild, 1983). Emotional labor is a type of organizational control (Van Maanen & Kunda, 1989) that involves organizational members changing or managing their emotions in order to comply with managerial interests, such as by using emotions to perform a role (Hochschild, 1983). Emotional labor involves a form of control that results in commodification: "Control of emotions occurs when feelings are treated as organizational commodities, when intimate and private feelings are appropriated to public domains… [or] feelings serve instrumental goals and task functions" (Mumby & Putnam, 1993, p. 472).

On the surface, grassroots organizing strategies appear to conform to this definition of emotional labor: feelings are brought into the public domain, for example through sharing public narratives, in order to accomplish instrumental goals such as connecting with and recruiting new members. However, the key distinction here is that in grassroots organizing, this baring of emotional life is not done for *managerial interests.* Rather, emotional work is done by individuals and groups on their own behalf. Individuals are not alienated from their emotional work, but rather benefit directly from it through developing relational ties, building power that will benefit themselves and their communities, and so on. While

“emotional laborers are required to take the arts of emotional management and control that characterize intimate relations of family and friends… and package them according to the ‘feeling rules’ laid down by the organization” (Ferguson, 1984, p. 53), grassroots organizers use those arts to develop intimate organizing relationships with members of their own communities. Rather than stripping away the individual experience, relational context, and intimacy involved in emotional expressions, as in emotional labor (Mumby & Putnam, 1993), grassroots organizing brings the individual experience, relational context, and intimacy *into* organizational activities. By connecting individual experiences to a larger community effort, strategies like the public narrative connect people to each other, enabling them to work together to advance shared social goals.

This distinction is an important one to make because of the implications of professionalization in grassroots organizing. As discussed above, grassroots organizing can be deeply rooted in emotionality; this is especially true of transformational repertoires, which use emotions to connect individuals to each other, constituting a collective. This *heart work* is distinct from emotional labor because it is in service to the constituency rather than managerial interests. But when an organization like RU professionalizes, managerial interests may indeed come into play—and may diverge from the interests of the constituency. An emerging class of managers may indeed seek to employ members’ emotional work in service to the organization, and if that happens, heart work may become emotional labor from which members are alienated.

The rationality-emotionality dichotomy may even exacerbate the professionalism-volunteerism tension. Emotions are commonly understood to be sidelined in the professional realm, which relies heavily on rational logics (Acker, 1990; Ashcraft, 1999; McCallum

2012). Volunteers, on the other hand, are not as beholden to rationality—but the greater freedom to engage with emotion also means the potential to be marginalized in a professional context. Data suggests this may be the case in RU. For example, at the last Regional Institute, Reilly, a member of the OT, commented that the facilitation team was not as professional as they could have been. This comment seemed to be responding to the fact that at that training, the team (which, at that RI was constituted by a combination of OT staff and highly involved volunteers) spent a great deal of time talking, laughing, and crying together. By that time, the facilitation team had come to know each other well and developed close relational bonds. Though relational bonds are something RU encouraged for instrumental purposes, Reilly's comment suggested that such a high degree of relationality or emotionality in the professionalized training context may be inappropriate. She seemed to suggest that emotionality made the organizers appear less professional and thus less legitimate.

The fact that activist organizing relies heavily on emotions for so many crucial activities (relationship development, sustainable commitment, connecting with others through personal narrative, engaging in anti-oppression work, and more) underscores the fact that this type of organizing is not a wholly rational endeavor. The emotionality of transformative repertoires is in tension with the rationality of transactional repertoires, and professionalization is implicated in how that tension is managed. Considering the marginalization of emotions in professionalized structures, it may be the case that professionalization is *especially* problematic for certain types of organizations that rely heavily on emotion, including constituent-based activist organizing. Through this discussion, I have extended current theorizing on professionalization of constituent-based organizations to connect that trend with the tendency for professionalization to sideline emotionality.

Below, in the section on practical implications, I return to the idea of emotionality in a discussion about trauma in grassroots organizing spaces.

7. Resistance Within a Resistance Movement.

As discussed above, RU members drew on discourses of distributed leadership and empowerment even as organizational practices and discourses around legitimacy and professionalization undermined that core ethos. However, some members engaged in activities constituting resistance to professionalization and National control. This resistance helped maintain a greater degree of distributed leadership than would likely have been possible otherwise, preventing local leadership from being subsumed. Enacting a distributed leadership structure may be facilitated in important ways by the dialectic of control and resistance; specifically, resistance actually helps maintain the core values of the organization.

It may be the case that resistance within a resistance movement may be especially powerful due to members' skills and expertise. As discussed above, because members gain skills and experience holding public figures accountable, they also become adept at holding organizational leaders accountable. However, it is also important to note that resistance can be more difficult in organizations that employ concertive control systems as opposed to bureaucratic control, as is the case in RU's distributed network. Resistance thus may be enabled and constrained in various ways by the structures of an activist organization.

Resistance is complex and contradictory, and member resistance can actually function to reinforce or reproduce systems of control (Collinson, 1992, 1994). This might suggest that member resistance in RU—namely, attempts to exert increased power by the grassroots in structuring the organization—may ironically backfire and reify National control. Interestingly, however, some research suggests that managers can play a role in enabling

member resistance in concertive control organizations (Larson & Tompkins, 2005). Managers themselves may resist organizational changes, especially when those changes implicate competing organizational values. Managers' identities are fragmented and management must negotiate different pulls on their allegiances (Deetz & Mumby, 1990). For example, Larson and Tompkins (2005) found that managers at a satellite production firm negotiated competing discourses of enterprise and of past success. They showed that the fragmentation experienced by management can result in managers undermining their own efforts at organizational change and inadvertently bolstering employee resistance.

A similar dynamic is illustrated by several RU staff organizers, including Lindsey and Natalie. Those organizers felt competing pulls between wanting to defer to their grassroots group leaders and the competing need of conforming to the demands of their jobs with RU National. Both, in their own ways, subtly undermined National control and consequently supported group leaders' resistance efforts: Lindsey by helping to connect Annette with other group leaders who would then form the Meso Tier, and Natalie by helping her group leaders to hold events that did not "count" as real work by virtue of non-quantifiable outcomes.

Staff members in activist organizations may be especially prone to feeling competing pulls between centralized strategies and supporting leaders in the distributed networks. When those members respond in the ways Lindsey and Natalie did, they may strengthen the resistance in which volunteer group leaders are already engaged. Along with volunteer leaders' skills in the context of resistance, this subtle support by formal leadership may further strengthen the ability of members to engage in resistance within resistance organizations. As RU shows, this resistance is valuable for holding organizations accountable to their core values and maintaining the structures that facilitate grassroots involvement.

8. Interactions Between Flows.

The present study builds on emerging research on the interactions between McPhee and Zaug's (2000) four flows of communication that constitute organization. For example Layne and colleagues (2019) found in their study of an emergent healthcare organization that ambiguity shaped interactions between communicative flows by functioning as a catalyst for how the organization was communicatively constituted. In this study, I suggest that tensions may similarly function as a catalyst.

Negotiation of tensions shaped the interactions between flows in several ways. First, the tension between repertoires shaped membership as members constituted their roles in terms of both transactional and transformational functions, and leaders constituted their roles in terms of a both-and approach to the tension: their roles were substantively shaped by enacting both transactional and transformational repertoires, and enacting both types of repertoires constituted leadership. This gave rise to another tension, that between multiple leaderships, and the negotiation of that tension in the membership negotiations flow significantly impacted the reflexive self-structuring flow. Reflexive self-structuring was in turn shaped by the formal-informal tension and that tension, marked by the influence of professionalization, triggered renegotiations of membership. Additionally, reflexive self-structuring by one group of members (e.g. local groups) triggered reflexive self-structuring by another group (National), suggesting complexity within as well as between flows that emerges from the tension between the membership groups. Thus tensions, like ambiguity, may catalyze communicative streams flowing into, triggering, or exacerbating one another.

Though this study focused mainly on membership negotiations and reflexive self-structuring, data was rich with information about institutional positioning as well, and some

of that data bears mentioning. For example, institutional positioning may be a key factor influencing membership negotiations in a distributed membership base like RU's. Because there is no formal barrier to membership in RU, members negotiate the inside/outside delineation in other ways. Some RU groups were quite ideologically diverse, ranging from moderate to progressive Democrats and even including the occasional idiosyncratic communist or anarchist. The uniting principle for these members was not a set of clear ideological commitments *to* something, but rather ideological commitments *against* the Trump administration—meaning membership was negotiated significantly in terms of institutional positioning.

In distributed organizations like RU, institutional positioning may itself be a fraught process as members seek to position themselves in different ways relative to other organizations. The Antifa example is illustrative here: while Reilly viewed RU as entirely distinct from Antifa and saw Antifa's repertoire of tactics as inimical to RU's, other members disagreed. Amal, for example, saw Antifa as unworthy of much consideration. Following Reilly's expression of discontent about Antifa's attendance at one of her group's rallies, Amal said, "We just stick them [Antifa] in the corner with the Proud Boys while we're over here doing our thing. The cops are good at separating them because they don't want another Charlottesville. There will always be people who want to punch a Nazi. But those Proud Boys and Antifa fighting in the [town square]? They're nothing. Idiots will be idiots." A third perspective was also raised: when Amal commented that "there will always be people who want to punch a Nazi," Isabel, also at the table, symbolically knocked on the wooden surface. Her nonverbal gesture suggested that *she* saw Antifa as an important corollary to RU—while RU's repertoires focused on civic action and institutionalized forms of protest, it does not

necessarily hurt the cause to have other activists around who were more willing to engage in necessary direct action to protect the community.

Members expressed similarly complex views about the Democratic Party. Some RU members sought to work closely with the party; others believed it was key to maintain distance in order to pressure party leaders. Still others saw the Democrats as active participants in systematic oppression.

With so many separate views about how RU relates to other organizations in the field of the political Left, who among these RU members has the constitutive power to engage in institutional positioning? This study did not seek to answer that question, but findings suggest that the tensions between membership groups are likely to influence the institutional positioning flow, identifying another area in which the communicative flows interact.

### C. Practical Implications

In addition to the theoretical implications discussed above, I identify a number of practical implications that constituent-based organizations and their members may consider. These include barriers to producing structures that operate differently than their predecessors, the need for structural reflexivity to facilitate increasing member empowerment over time, several challenges relating to the particular structure of a distributed network, the importance of critical incidents at the system level as they filter into the organization, and the considerations involved in organizing strategies that tap into members' previous traumatic experiences.

1. The Challenge of Doing Things Differently.

First, it is interesting to note that the trend toward formalization and professionalization in RU occurred *in spite of* founding members' vision to build a structure

that would enable new and different strategies than those of other constituent-based organizations. In fact, early on, some founders claimed to not want to build an organization at all, let alone a formalized and professionalized one. As Liz, one of the uncredited authors of the *Guide,* told me, "Jacob said at the first meeting, 'we're not forming an organization,' and I was like, 'bullshit!'" Jacob, who later became a leader in the professionalized structure, shared the same narrative—initially, he insists, he and his *Guide* co-authors intended to simply provide tools to new activists so they could take action against the Trump administration.

As Jacob and other leaders in the professionalized structure tell it, the decision to form an organization emerged out of a pressing need from the grassroots to have increased direction and guidance. Following the formation of thousands of autonomous local groups, the authors said, they had to decide between providing the membership lists to an existing organization, or creating an organization of their own to support the local groups. They chose the latter out of a desire to do things differently. As Amy, another founder, shared with me:

> We had an entire period where we were trying to figure out whether we should sort of give this as a project to another organization and came to the conclusion that, you know, organizations have a certain DNA. They have a certain structure. Most non-profits have a fairly strongly established brand and a lot of well-reasoned needs around protecting that brand. And our comparative advantage in this moment was that, you know, we had this new brand that had happened with RU and we had told a large number of people to make it their own. And they were really enthusiastically doing that all over the country… And if there was gonna be an organization dedicated to supporting that, it would need to start from sort of

> that basic commitment to a genuinely independent local movement all over the country that really would be driven at that local level.

There is an irony in starting the organization with the goal of *not* being influenced by existing brands of other organizations, but then developing a unique brand that RU sought to protect—a brand that, in some ways, was quite similar to existing organizations. Even as RU grew into a large national organization, National leaders claimed that, "We're not some big national org with chapters that have to look and act just like us, we're a collection—a network—of independent groups that are developing on the ground." This discourse represented RU as a unique and multifaceted organization unlike earlier incarnations of progressive constituent-based organizations.

It is unclear whether RU's discourses of "doing things differently" represented genuine intentions or a form of public relations and marketing, but based on conversations with National staff early on, data suggests that there was genuine intent. Despite the intention, however, creating a unique organizing model was a major challenge. RU did do some things differently: for example, providing distributed access to the VAN, a resource historically held close by formal organizations and campaigns. Still, they drew on many existing models of organizing, including the model promulgated by Marshall Ganz from which most of RU's trainings derived, and became professionalized in a way that many other organizations similarly experience.

In their emergent stages, organizations have the potential to produce structures that look and function differently from previous models. However, accomplishing that potential proves to be profoundly difficult, especially due to the pressures of operating in a capitalist economic context in which competition and efficiency reign over the market, and as

members translate prevoius experiences in such contexts the new organization. I turn now to a discussion of structural (re)production in RU and the key considerations relating to one of RU's core goals: member empowerment.

2. Structural Reflexivity and Member Empowerment.

A major consideration for organizations is the need to take into account increasing member empowerment over time, and to develop structures that can reflexively adapt to those anticipated changes. In RU, empowering grassroots activists in the political sphere was a central goal, and similar goals are shared across civic and other constituent-based organizations.

As the case of RU shows, member empowerment in the *political* sphere can have the unanticipated outcome of creating a desire for increased empowerment in the *organizational* sphere. By routinely participating in civic activities, members grew accustomed to having their voices heard, and being heard in the organization came to be an expectation. This expectation was enhanced by RU's early practices of involving members in the process of visioning the organization as National emphasized the ability of grassroots members to voice their ideas and feedback, situating grassroots volunteers as "the leaders of this movement." Exemplary of this ethos was the Listening Tour in the summer of 2017, which was designed to solicit input from grassroots members as to what needs, wants, and ideas they had about how to structure the organization. The Listening Tour occurred early on in the organization's life, and findings did seem to substantively shape the structures RU (re)produced and the resources that were developed and made available to members. For example, members voiced the desire for anti-oppression training, for voter contact tools, and for guidance on

how to structure groups; all of these were areas on which National staff placed an emphasis in order to respond to members' needs.

The sense that grassroots voices were truly being heard, however, diminished over time and coincided with an increase in political empowerment. Incidents occurred during which grassroots feedback was not solicited prior to decisions being made, such as the Franken incident. On other occasions, feedback was solicited but local leaders felt their responses were not respected, such as in the case of presidential primary endorsements. When they began to feel their voices were *not* being heard by National leaders, grassroots members then adapted their tactics to hold RU accountable.

In response to these incidents, grassroots leaders tapped into the skills they had developed for participating in civic life and applied those skills to their involvement in the organization. They came to see themselves as not only an accountability structure for their government representatives, but for the formal organizational leadership as well. They used their skills to hold RU accountable by engaging in resistance. For example, some members built out the Meso Tier, a member-led coordinating structure. Others pressured RU to hold listening sessions with group leaders at a statewide meeting in early 2019. Through resistance, grassroots leaders attempted to hold National leaders accountable to the ethos of bottom-up leadership. Though some still questioned whether the organization was truly bottom-up (and data does not suggest that it truly was), the accountability function of leadership did matter and helped ensure a higher degree of grassroots voice and involvement than would likely have been possible without grassroots resistance, such as the formation of the Meso Tier. Though the Meso Tier was stunted by neglect and perhaps opposition from

National, the fact that the structure did emerge and become functional suggests some power held by the grassroots.

RU shows that organizations that are committed to member empowerment and distributed governance need to anticipate increased empowerment over time and develop structures that can accommodate those changes. My findings suggest that organizations should make sure not to put a ceiling on empowerment. That is, if the goal is to empower leaders, there should not come a time that their empowerment is unnecessarily capped or limited within the organization. Rather, increased empowerment can be seen by organizations as a way to continuously move toward more distributed structures and more meaningful decentralized decision making.

A challenge of member empowerment and distributed governance, however, emerges in the form of multiplicity of opinion. RU, as discussed above, is a large umbrella for relatively diverse perspectives running the gamut from the moderate to the progressive left, with a few outliers thrown into the mix as well. Within a single district, two RU groups may have dramatically different opinions, such as in one Congressional district where two groups sought endorsements of competing primary candidates. And even within groups, serious conflict can emerge: multiple accounts were relayed to me of individuals exiting groups following acute episodes of conflict with other members, and participants like Maureen recounted at length the challenges of establishing and enforcing codes of conduct relating to how members would reconcile different viewpoints regarding which issues should be prioritized.

Scaling up distributed decision making, then, poses significant challenges, but those challenges may be surmountable. Any distributed governance structure must balance member

empowerment with the challenges of multiplicity and there must be mechanisms in place for negotiating the myriad opinions held by group members.

The professional leadership of RU did, as individuals and a whole, truly seem to believe in the ethos of member empowerment. Nothing in my data suggests intentional duplicity or any attempts to manipulate or deceive the grassroots. Rather, RU, like other civic organizations, faced systematic challenges relating to formalization and professionalization. Considering the trend toward formalized, professionalized structures in civic, constituent-based, and social movement organizations, it is critical to explore the drawbacks to these trends and identify potential ways to mitigate those challenges.

Data from this project suggests some directions organizations might consider. One useful tactic RU employed was promoting volunteer leaders to staff. This effort uplifted the leadership of highly involved leaders and brought grassroots perspectives into the professionalized leadership body. However, these efforts were limited, likely due to the limited number of staff positions that could be funded. To supplement this approach, additional tactics could also be useful. For example, supporting structures like the Meso Tier could help harness the skills and knowledge situated in local groups and distribute those resources among the grassroots. Additionally, a number of participants mentioned to me the idea of providing stipends or grants to volunteer leaders. Those funding streams could be more bounded than full-time staff positions, and rather than devoting a large funding stream to a full-time salary over the course of several years, could be used to grant smaller amounts of funding to more local leaders in return for certain significant time-bounded activities. This type of funding allocation could, for example, have helped grassroots leaders more effectively build out the Meso Tier, which could then have functioned as the primary meso-

level in the organization (rather than building out the Nationally-controlled CNA as a parallel structure).

Organizations should also be cognizant of the fact that their lofty statements communicate into being real expectations from members. The claim that the grassroots members were "the leaders of the movement" exemplifies such a lofty statement. Members joined and committed to RU in part because of this ethos, and much of the dissatisfaction later on resulted from a sense that organizational practices did not line up with the member-led ideology. Organizational leadership must be careful to put forth ideas that they can stand behind, and to stand behind the ideas they have already put forth to the greatest degree possible. To do otherwise engenders discontent, which can fuel not only resistance (which has generative potential) but also attrition. Based on my findings, I believe that fostering and anticipating increased member empowerment—and (re)producing structures that enable members to exert progressively more power within the organization through distributed leadership/governance—will help organizations better live up to their ideals such as bottom-up decision making.

RU's member training efforts focused explicitly on constituent-based civic activism and holding government leaders accountable, which may have enhanced RU members' abilities to hold organizational leadership accountable. However, other types of organizations—that is, those less explicitly focused on civic activism—may also function to cultivate leaders whose skills translate across contexts, including into organizational involvement. Focusing on this potential for cultivating genuine leadership capabilities could help reignite the ethos of civic organizations as a breeding ground for democracy (Putnam, 1993).

One of the main goals RU members agreed upon, based on surveys about issue priorities sent out and shared by National, was protecting U.S. democracy. This included issues like voter access (including overturning and preventing voter ID laws, expanding mail-in voting, and expanding polling places) and redistricting (also known as gerrymandering). RU approached those goals mainly by supporting or opposing relevant legislation. However, it may be the case that a more important strategy is the strategy of cultivating community leaders and fostering deep relationships in interconnected community networks.

3. Challenges of a Distributed Network Structure.

The transactional-transformational tension gives rise to two parallel challenges when developing a guiding National structure in the context of a distributed network. First, the pace at which transactional structures are scaled up may outpace the degree of transformation occurring among members, creating issues for sustainability. Conversely, when structures do not adapt fast enough to match member empowerment resulting from transformation, or constrains the degree of empowerment experienced by members, members may become frustrated. Additional challenges include relatively homogeneous networks and the question of who leads the leaders.

The former challenge was especially evident in the unfolding of RU's endorsement process. The endorsement process, part of the transactional repertoire, may have resulted in such high conflict because it was scaled up too quickly. This is supported by the fact that local endorsements were far less contentious than the proposed National-level primary endorsement. The local endorsement process occurred at far smaller scales, and when conflict did emerge, data suggests local groups were able to negotiate those situations. As noted in the findings section, some groups simply chose not to participate in local

endorsements. The National-level endorsement, however, would have occurred at a far larger scale and involved collective decision making by thousands of members embedded in their own local groups; for the most part, deep relationships did not seem to exist between and across far-flung groups, with some exceptions (such as members who joined meso-level structures such as the Meso Tier, CNA, or statewide networks, or who developed friendships at the Regional Institutes). The lack of deep, resilient relationships would have made large-scale conflict difficult to manage.

Findings from RU suggest that organizations should be cautious about scaling up transactional repertoires too quickly; scaling up effectively requires transformational change as well, and transformational change takes time. By enabling transformation, organizations can foster the resiliency necessary to take on greater challenges, enabling members to negotiate tensions—including the tension between repertoires—at higher levels as the organization scales up. It may be difficult for organizations to take a slower pace when activism is burgeoning. It may seem like a trade-off: sacrificing some potential to scale up in critical moments for the sake of uncertain long-term potential. However, it does not need to be that way.

Parsing which types of activities *can* scale up without risking conflict and which types require a foundation of deeper trust can help leaders maximize potential in both the short and long term. The key here is to identify the degree of trust and solidarity required for a particular activity. Protests and rallies, for example, require little in terms of existing trust relationships between participants. Rather, they allow participants to discursively negotiate an array of potentially conflicting meanings through highly visible message framing; contention between meanings can be generative rather than detrimental (McClelland-Cohen

& Endacott, forthcoming). This may be because the stakes are relatively low—protest involvement does not meaningfully constitute identity (Kavada, 2015) and therefore identity is not deeply threatened by conflicting messages. Other activities have far higher stakes. For example, endorsing a candidate means that a member's identity in the group is also linked to the identity of the candidate the group endorsed. Compromising on one's preferred candidate may be perceived as compromising one's political identity, posing a significant threat. This threat might be exacerbated by the verbal brutality observed between supporters of opposing candidates, including Democratic primary opponents in 2016 and again in 2020. When the stakes are high and the threat to individual members' identities is heightened, greater trust among members is required in order to engage in that activity, meaning greater work is required to build those trust relationships among networked members before scaling up the activity.

i. *Homogeneous Networks, Diversity, and Privilege.*

Another challenge in distributed networked organizing arises from the way networks are constituted. In networked organizations like RU, groups often formed based on preexisting social relationships like friendship or workplace networks, reading groups, or dance collectives. They reflect the social relationships that exist outside of the organization. As a result, they can be quite homogenous—a problem RU grappled with. While there was relative ideological diversity representing a broadly constituted "progressive" identity that included various political identities on the left of the political spectrum, the majority of groups were overwhelmingly white, middle-class, educated, cis-gendered, heterosexual, abled women. This relatively homogeneity in identity was salient due to the organizational

goal of supporting diversity and anti-oppression. Members were aware of and reflexively negotiated this tension as they made efforts to engage in anti-oppressive work.

Still, fostering diversity in groups such as these requires intentional, reflexive work, and members may not always be prepared for that type of work. In homogeneous networks, members may also not be *aware* of their lack of preparedness. For example, during the first Regional Institute I observed an interaction between two group leaders of neighboring groups in a mid-sized metropolitan area. The two members were in a small group discussing strategies employed by their groups to be inclusive of diverse identities, and the conversation had turned toward a trend that some leaders had noticed involving higher attrition rates among people of color. Wendy, a white woman, commented that in her group she had not noticed such a trend. Angela, a Black woman, responded that "I had a few Black friends who went to your meeting in [your neighborhood] and had a bad experience." Wendy was surprised to hear this, and the two agreed to talk privately after the session. Moments later, Wendy commented that she felt uncomfortable using the term "people of color" because she "doesn't see color," to which Angela subtly rolled her eyes. Wendy did not notice the nonverbal gesture, and no one in the small group stopped to interject that the comment Wendy had just made constituted a microaggression.

This interaction is an interesting illustrator because it suggests that Wendy, for all her good intentions, was woefully unaware of the experiences of people of color in her group, nor was she aware of the impact that her claims of colorblindness could have. Though I was not present for the private conversation afterward, it is clear that there was a dynamic at play in Wendy's group that white leaders had not noticed or reflexively responded to. This may be due to the relative homogeneity of the group—many members with similar, privileged

experiences who had not yet undergone intensive political and anti-oppression education (this conversation occurred during the very first of RU's anti-oppression workshops) did not have the awareness or tools to respond.

Some members of RU sought to increase their own reflexivity and responsiveness by recruiting and "uplifting" leaders of color in their groups. However, leaders of color frequently noted the potential for this strategy to result in *tokenization*, or relying on particular members of an identity group to represent all members of that group, essentializing them based on that one element of identity. Leaders of color also expressed exhaustion resulting from groups constantly relying on them to serve in those roles.

RU thus faced a chicken-and-egg type dilemma: in order to become more inclusive, members needed to develop reflexivity; but in order to develop that reflexivity, members needed to break out of their homogenous networks.

One approach RU leaders suggested was to focus on allying with (or, as some suggested, being "accomplices" to) POC-led organizations, rather than attempting to force diversification. This strategy would balance the relative homogeneity of RU groups with the desire to support POC-led efforts without getting stuck in the dilemma of trying to diversify. Instead of spending energy trying to recruit a more diverse group of members who may then not have the support they needed to work within RU groups, groups could find out what resources and support POC-led organizations needed and do what they could to provide. This worked well for some RU groups. One group, for example, knew that a local chapter of Black Lives Matter needed white "accomplices" to participate in a civil disobedience action; the idea was that with more white bodies on the line, there would be greater accountability if police violence ensued. Several members of the RU chapter participated, and the group

leader reported to me that it helped build trust relationships between the two groups. Still, there were challenges: some RU leaders did not adequately consult with other organizations before jumping in to provide what they understood to be support, and tensions rose as a result.

A tactic that worked well in RU was that of political education and providing specific guidelines for appropriate ways to respond to the emotional challenges of confronting one's own privilege. After anti-oppression trainings at early RU Institutes, it was common for white members to approach people of color in order to express their newfound realizations about their privilege. This placed an unfair burden on the POC leaders who were expected to do additional emotional labor. To adapt, RU would have a white leader introduce the anti-oppression session and emphasize the norm that it was *not* appropriate to engage in this type of behavior; rather, white people should approach *other* white people if they wished to discuss the emotions that arose as a result of the training (typically, the leader presenting that introduction would volunteer and point out other leaders who were also willing to engage in that type of work). They would also review the idea of call-in culture and remind those who were most privileged that it was important to step up and do the work of calling in others with privileged identities who overstepped bounds. This helped relieve some of the burden typically placed on people of color *and* contributed to developing white members as anti-racist leaders.

There are two key points here that might be taken away from the present study and considered by other organizations with similar demographic makeup and anti-oppressive missions as RU. The first is to consider how the organic relationships that develop among members might problematically reflect and (re)produce the relative homogeneity of most

Americans' social networks. Considering this, the next step is to evaluate how such groups can best contribute to anti-oppressive organizing in ways that do not just make members feel good about their efforts, but genuinely contribute to dismantling oppressive structures. RU National, and many local groups, did actively consider this—and those that did seemed to engage in more constructive collaboration with other local organizations.

The second is to place the burden of anti-oppression education on the most privileged groups. Some contemporary organizations like Showing Up for Racial Justice (SURJ) are specifically oriented around such an approach. Others can follow that model as one of many strategies that contribute to undoing white supremacist structures.

4. Who Leads the Leaders?

A core theme of this project has been exploring the tension between grassroots and professional leaderships in the hybrid, distributed context of RU. In a *leader-ful* (as opposed to "leader-less") organization, who leads the leaders? I have discussed, at length, the tension and how members negotiated it, both in the findings and the earlier portion of this chapter. Still, it bears repeating that organizations involving multiple leaderships must parse this question from a practical perspective. If an organization intends to be member-led, the practices that constitute member leadership must be clearly delineated, communicated to, and negotiated among all membership groups.

Member-led structures can take an array of forms from true consensus to democratic decision-making to less potent forms like occasionally surveying a membership body about their priorities. Findings from RU suggest the most important consideration here is being clear about what that philosophy means and how it will be implemented, and holding all organizational leaders accountable to those practices.

There is another consideration—perhaps a caution—emerging from RU: any "member-led" organization that *also* includes formal staff whose membership is clearly delineated from other members is likely to encounter a tension. There are ways to negotiate this tension. For example, labor unions may maintain a skeleton staff such as an accountant or an office manager, but still be led in substantive ways by members chosen from the constituent body. Alternatively, some cooperative organizations may hire staff only from within the constituent body. However, professionalized models in which professional staff work alongside volunteer member-leaders may be inherently problematic. At the very least, those organizations will need to deliberately ask and answer the question of who leads the leaders.

5. Critical Incidents and Relationship Development.

While a number of critical incidents that emerged in RU relate to events within the organization, many others directly involved or were triggered by incidents at the system level that impacted members and spurred action. These incidents were all highly emotional, underscoring the importance of emotions in grassroots organizing as discussed above and giving rise to further considerations about how emotions are managed in these contexts.

Most prominently, the 2016 election set off widespread political action among novice activists who would become the member base of RU, and the 2017 Women's March provided a space in which those activists met, networked, and in many cases started their own RU groups. Subsequent incidents also proved to be formative, including the Congressional battle to protect the Affordable Care Act, the Franken incident, the 2018 midterm elections, and the Senate hearings on Brett Kavanaugh. Notably, some of these incidents were clear losses for RU and the progressive movement. Both the 2016 election and

the Kavanaugh hearings were especially brutal experiences for progressive activists as men who had credibly been accused of (or even bragged about) sexual assault were elevated to power in spite of widespread optimism, especially in the wake of the #MeToo movement, that their power would be curtailed.

These incidents suggest the importance of organizations recognizing the criticality of incidents at the system level—but not just for the purpose of recruiting members or to take advantage of political opportunities. In addition to those functions, critical incidents such as those described above may serve as catalysts for relationship development and community building among members.

There are reasons to believe that focusing on organic relationship development at key moments may be a necessary way to supplement other types of relational strategies. Relationship development was a focus of RU's trainings and members participated in learning and deploying tactics such as one-on-one conversations, celebrating successes, and others. Still, members often expressed discomfort with those strategies—especially the one-on-one conversations, a tried and true organizing tactic involving semi-structured conversations between a more experienced organizer and a more novice activist, during which the more experienced organizer seeks to learn about the new activist's motivations, surface shared values, and build rapport in order to help sustain the new activist's involvement over the longer term. In practice sessions, it was common to hear participants *not* actually practicing the one-on-one structure as they were supposed to, but rather talking with their practice partner about how awkward they found the exercise. The awkwardness of engaging in such conversations is part and parcel of organizing, and experienced organizers—including professionals—have typically learned to endure the discomfort or may

even have been attracted to that type of work because they enjoy it. For novice activists like RU members, however, these tactics may be especially difficult. The challenge may be exacerbated by the counter-pull toward focusing on existing relationships within their groups, which provided clear social benefits, drawing energy away from potentially uncomfortable exercises designed to draw in new members.

Furthermore, it was rare to hear reports of deep relationships that were cultivated through intentional relational strategies like one-on-one conversations. In fact, to the best of my knowledge, not a single RU member shared with me a story about a meaningful relationship that developed that way. Most enduring relationships were developed in one of two contexts: at the flashpoint of a critical incident (with the most common incident being the immediate aftermath of the 2016 election) or over time through the ongoing process of engaging in activism together. Thus, while tactics such as one-on-ones *can* be valuable for relational development, relying on these inorganic methods alone may be a detriment. Incorporating more organic strategies may be a beneficial or even necessary supplement.

Without suggesting that organizations abandon more standardized relationship development tactics like one-on-one conversations, it does seem logical to suggest that organizations be cognizant of the fact that critical incidents may be one of the most effective contexts for members to develop enduring relationships due to the emotions they elicit and the rich potential for relational development in such an emotional context. As Taylor, a staff organizer, said at one trainer-training session: "[The 2016 election] was a national trauma we all went through. It's powerful to remember the collective experience that brought us to the same place." As Taylor suggested, drawing on those shared experiences may help facilitate bonding by making it easier to identify commonalities and shared experiences. Leslie did

this, for example, in her activity asking members to recall their emotional state following the 2016 election and then envision what they hoped to feel after the next election. Tapping into the shared emotional experience can be valuable for relationship development.

I do *not* mean to suggest that organizations should simply chase headlines in order to take advantage of the media cycle, regardless of whether an issue is winnable. Rather, organizations should be mindful that positive outcomes do not necessarily mean "winning" on a particular issue—other benefits, like relationship development and building community resilience, can also emerge from campaigns or situations that are likely *un*winnable in terms of the primary goal. There can be value in taking on fights such as these—for example, the Kavanaugh confirmation. RU political staff who led the RU strategy around Kavanaugh knew from the beginning that, given the makeup of the Senate, it was highly likely that Kavanaugh would be confirmed regardless of what RU and other activist organizations did, even in the face of damning testimony by Christine Blasey Ford. They were clear about this likelihood with the RU membership and focused on a "two-pronged strategy" of first, trying to flip key Senate votes to defeat the confirmation, and second, looking toward the midterm elections to win back the Senate and prevent any future Trump nominees from being confirmed. By developing this strategy, RU was able to recognize the unlikelihood of winning the immediate battle while still deeming it worthy of fighting. Though RU deemed the battle a worthy one based on principle, I suggest there may be a secondary source of worth: the relational bonds developed in the process.

The political staff were entirely correct—Mr. Kavanaugh was confirmed to the Supreme Court in October 2018. However, members of RU would go on to discuss that process as one in which relationships became strengthened and groups demonstrated their

resiliency. Despite failing to accomplish the immediate goal of keeping Kavanaugh off the Court, taking on that fight helped RU accomplish the instrumental goal of relationship development and community building. This was an unanticipated benefit for RU, not directly named or stated by any members; recognizing the value can help organizations reflexively harness the power of similar critical incidents as they develop their strategies.

6. Trauma and Mental Health in Activist Spaces.

Following the previous discussion of the Kavanaugh hearings, it is worth noting the importance of mental health in grassroots organizing spaces and the ways that harnessing traumatic events may also have harmful consequences in order to mitigate those harms. The quote in the previous section names the 2016 election as a collective trauma, and that was a view shared by many RU members. RU members were also, in some cases, survivors of other traumas including child abuse, sexual assault, domestic violence, systemic racism, military combat, and more. Often, those traumas were activated during sessions like the anti-oppression training (which was especially difficult for organizers of color to participate in repeatedly) or during political work on issues relating to race, gender, and violence. Members sometimes shared those experiences in public narratives or in less public spaces like close conversations with fellow organizers, and in return received social support.

For some members, it was trauma that inspired political action to begin with, and political action could serve as a sensemaking mechanism for trauma. Taking pro-active steps to mitigate future harms could be helpful for members seeking to feel a sense of control and empowerment. However, the need for caution arises when dealing with such sensitive mental health issues to ensure that organizational activity does not exacerbate harm.

Though members did provide one another with social support, trauma responses may be considerably more difficult to deal with than more common organizing struggles like anxiety around public speaking. Organizers may not have the expertise necessary to truly deal with these issues. Consider the following exchange at the October 2017 trainer-training. This exchange occurred after the lead training team showed a video of a public narrative facilitation session in which one participant shared a deeply traumatic memory as part of their story of self. Facilitators were preparing for the next day, when they would be leading groups of RU members in crafting and sharing their own stories of self (one piece of the three-part public narrative). Participants reacted strongly to the emotional video, spurring the following exchange:

> Craig (lead trainer): We don't make people go somewhere they don't want to go. We have to distinguish narrative work from therapy work. How do we use the emotion bring to encourage them to step up and organize?
>
> Darin: In the video, he [the facilitator] said the story of self is to help people find a sense of agency, and he was trying to encourage her to do that. I have hard feelings when I tell my own story of self, and I can easily lose myself, so I appreciate that.
>
> Giselle: I want to push back on the idea that this can't be therapy—it isn't, but the facilitator could have asked something as simple as "are you okay? Do you want to keep going?" to really give her that choice of whether to continue.
>
> Tammy: I'm pretty new to facilitating, but I'd have been uncomfortable facilitating that.

Craig: Everyone has their own style. He did acknowledge that courage to be vulnerable. This woman went on to do a lot with RU, and I think this moment was important to her—like Darin said, using the story to help build agency.

Kayla: If we're asking people to be vulnerable, we need to be able to deal with it—get folks back to neutral. You can ask, "what's this color? What's that color?" Take some breaths.

This exchange starts out with the lead trainer distinguishing organizing from therapy, though one of the other organizers pushes back on that idea and suggests that organizing could be therapeutic, as I also suggest above. Another organizer voices that she would have been uncomfortable facilitating such an emotional session. Two of the organizers suggest concrete steps that facilitators can take in such a situation, but only one taps into the types of strategies used by therapists in trauma cases to reduce psychological activation in the moment (the strategy of identifying and naming colors). Following this exchange, the team shifted to hearing another example and practicing giving feedback about the story of self. They did not further discuss the steps that could be taken to reduce activation in someone who is re-experiencing trauma, likely because no one in the room was a trained mental health expert. Later, some facilitators would feel overwhelmed when facilitating that section, especially when severe traumatic experiences were raised in the context of participants' stories of self, including a story about violent crime victimization.

The key takeaway here is that some activists, like almost any population, will be survivors of trauma, but in activism, those experiences may be more relevant than in other organizational contexts, and when they become relevant, participants may be activated (or

what is colloquially referred to as "triggered"). Sometimes, organizing strategies or contexts will call on members to voluntarily re-experience their trauma (e.g. in the story of self). Even when facilitators emphasize drawing on less traumatic but still meaningful experiences, other activities may place members in a situation of having to relive their trauma (e.g. sexual assault survivors working to defeat the Kavanaugh nomination or people of color being asked to participate in the privilege walk). Inevitably, painful issues arise, and critically, facilitators are typically *not* trained mental health caregivers. They may share anecdotal examples of how to cope and help others cope with troubling situations, as in the above exchange, but they do not necessarily have the expertise to do so effectively—and, importantly, their job descriptions do not include therapy work. Taking on that type of work goes above and beyond their duties, and while many leaders may be willing or even happy to do so, they simply may not have the tools they need or may suffer their own emotional burdens as a result.

It may thus be beneficial for organizations like RU to consider consulting with mental health professionals about how to best approach certain situations, including public narrative and anti-oppression trainings. It could even be useful to allocate funding for a social worker to be present and participating in the trainings, or at least to participate in trainer-trainings and provide the facilitators with helpful tools. Drawing on professional mental health expertise could help organizations like RU take a constructive approach that both enables members to draw on their painful experiences *and* to remain healthy and safe while doing so. Sharing past trauma in the context of organizing can be beneficial, but organizations must take precautions to ensure they do not put members at risk.

Of course, there is an irony to suggesting increased professionalization by consulting with mental health professionals. However, this irony can be resolved. Some RU members were themselves mental health professionals, and it may be possible to harness that type of expertise within the organization, though they would need to navigate ethical guidelines for doing so. Bringing in experts need not (re)produce professionalization when negotiated intentionally in light of organizational values.

In addition to protecting grassroots members, consulting with mental health experts could help mitigate some of the challenges experienced by grassroots and staff leaders. As time marched on, RU focused increasingly heavily on sustaining grassroots membership. Though concrete empirical data on volunteer attrition rates was impossible for me to obtain (RU staff suggested such data was not even available to them, due to the informal nature of membership), attrition of staff organizers was much more apparent. By the conclusion of this study, the vast majority of organizing staff who had been at RU when I began my work with them in 2017 had left the organization. This notably high turnover rate may be in part due to the 2020 elections—many of the staff took jobs on various Democratic presidential primary campaigns—but multiple organizing staff also suggested to me that the burden of their jobs at RU was simply too great, and it was that burden that led them to return to electoral organizing. This may suggest that transformational repertoires were not employed among staff members to a great enough degree. Additional tools to help organizing staff manage the most challenging moments may help increase the sustainability of the organizing team itself.

### *D. Limitations*

Ethnographic methods provide a rich framework for examining human behavior in natural settings and developing deep, nuanced understandings of a particular case. To answer

the question of “what is going on here?” a researcher enters a world, explores it, and systematically works to untangle a coherent understanding or make sense of it (Agar, 1986). Participants are observed in their natural setting, and the researcher may adopt a partial participant role that lends itself to better understanding the lived experiences of those involved in the setting (Goffman, 1989). The researcher develops a deep familiarity with their participants and the setting and conveys those understandings through rich description to the reader. Observations and participation are combined with other methods of inquiry such as interviews, and these multi-method approaches can yield remarkably nuanced and valid data (Barley & Russell, 2016).

An ethnographic approach was especially useful for this project. Qualitative analysis—and ethnography specifically—has been lauded for contributing creative insights to the field of organizational studies (Fine et al., 2009). Ethnography is useful for studying not only small groups, but also larger social systems (Brown-Saracino et al., 2008). And, as Brannan and colleagues (2007) argue, ethnography is “especially relevant to current forms of post-bureaucratic and service-based organization” (p. 396).

Though ethnographic methods have been critiqued for their lack of traditional scientific grounding, they also provide a key benefit: the researcher’s sensemaking frameworks, methods of eliciting and organizing information, and individual positionalities are foregrounded and presented to the reader for scrutiny (Agar, 1986), as I have done above in the method section. In this way, ethnography makes transparent the epistemological and axiological commitments of the researcher.

Still, ethnography involves limits that must be acknowledged. This study was limited in the type of analysis, the participant sample, and access to certain sites from which data

could have been gathered. This study used an array of data including field notes taken during participant observation, in-depth and informal interviews, and supplemental documents, but did not include quantitative data analysis that could provide a useful supplement. Using a mixed methods approach to incorporate some quantitative data could provide some interesting findings, especially relating to the degree of empowerment and the strength of network relationships over time.

More importantly, the participant pool in this study was limited due to the types of events I attended as a participant observer, though rather than truly limit the study, the types of participants involved helped to shape, focus, and narrow my exploration. All six field visits occurred at either Regional Institutes or a State Summit, all of which were sites for RU leaders to meet, participate in trainings, and develop their repertoires of action. Virtually all participants, as a result, were leaders of some sort—either professional staff leaders or volunteer grassroots group leaders. Most interview participants were people I met at those trainings; a few were solicited using a snowball method by asking other participants if they would recommend people for me to talk to. Even those who I connected with during the snowball sampling still represented leaders in their RU groups. Thus, my perspective was limited to a particular type of member in RU. However, again, this was not so much a limitation as an opportunity to focus in on negotiations of leadership, which proved to be a fascinating area to explore tensions that influenced the structuration process in RU. Still, a more complete picture of RU could be developed through a broader, more representative sample of RU membership including less involved members.

A second limitation regarding the population of the study is also relevant: within the population of RU National staff participating in this study, most were members of the

Organizing Team. This was, again, due to the type of field work I did. The OT was responsible for organizing and running the Regional Institutes, and most OT staff attended one or more of those Institutes. Other National Staff attended as well, but in fewer numbers—only one or two members from each department participated in any given Institute, and some departments (Human Resources, for example) were scarcely represented. Thus, my perspective on the functioning of RU as a whole was limited. However, because this study focused on the interactions between National and local groups, that limitation was not prohibitive to the study—in fact, the population provided especially useful data given my focus.

Additionally, I was not able to gain access to certain sites that would have enriched my data, including the online Meso Tier platform. Due to the sensitive relationship between Meso Tier organizers and National staff, the Meso Tier organizers I interviewed did not feel comfortable giving access to *any* outsider. Though they did not provide me access to their platforms, they did discuss how those platforms operated and the types of information typically shared.

I was also unable to gain access to staff retreats or to the National Institute held in August of 2019, and due to time and funding constraints I only attended five out of eight total Regional Institutes. Though those sites would have provided additional data, I am confident that I achieved theoretical saturation with the data I did collect. By the fifth Regional Institute I attended, little new information emerged. To supplement the Regional Institutes, I *was* able to secure access to a 2018 State Summit, which provided rich data on National-local interactions since the State Summit was organized more heavily by volunteer leaders than were the Regional Institutes, which were spearheaded by National staff.

In short, additional quantitative data and data from sites like Meso Tier, as well as a broader participant pool including more non-leader members and non-OT National staff, would have provided greater insights and a more complete picture of RU. However, I believe the scope of the current study was sufficiently addressed by the data and participants I did have, and theoretical saturation regarding my five research questions was achieved. The contours of my research site and participant pool proved helpful in shaping and focusing the study, and limitations relating to access—such as lack of access to the online Meso Tier—were overcome using other methods like interviews. As a whole, the ethnographic method was a useful approach in this case and allowed me to explore and answer the question of *"what is going on here?"*

### *E. Directions for Future Research*

This study presents a number of interesting avenues for future research including concertive control in distributed networks, narrative as a strategy to manage strategic ambiguity, the impact of collective trauma in constituting an organizational identity in activist organizations responding to large-scale social unrest, and exploring the relationships between different types of collective structures including organizations and social movements.

1. Concertive Control in Distributed Networks.

To accomplish any shared goals, members of an organization must negotiate and implement some sort of control system that keeps the organization functioning and moving toward those outcomes (Coombs et al., 1992). In bureaucratic organizations, control derives from positions of power relative to members' positions in the hierarchy and is rooted in rational-legal logics or rules that reward compliance and punish noncompliance (Edwards,

1981). While bureaucratic control is intended to be fair and efficient, it is also highly rational and can create what Weber (1958) calls an *iron cage* as rationalized, bureaucratic relationships become immutable.

In theory, decentralized, participative organizational structures are less constraining than bureaucracy's iron cage. In these "flatter," less hierarchical organizations, a new type of control emerges: *concertive control*. Concertive control (Tompkins & Cheney, 1985) employs normative ideological rules rather than the formal hierarchical structures of bureaucracy. Contrary to what scholars initially imagined, however, concertive control in postbureaucratic organizations can me "more powerful, less apparent, and more difficult to resist than that of the former bureaucracy" (Barker, 1993, p. 408). Barker (1993) found that normative rules became increasingly rationalized and concertive control did not free members from the "iron cage" of bureaucracy—in fact, it drew the bars of that cage tighter, constraining members in powerful ways.

Since constituent-based organizations are likely to focus on member empowerment and some degree of distributed decision making, it is likely that much of the control influencing members of these organizations occurs beneath the surface and is channeled through normative ideological frameworks. This type of control may have both positive and negative consequences and merits further exploration.

A compelling avenue of research could be into the potential of concertive control as a mechanism for anti-oppressive practices. For example, concertive control may be employed by organizational members in the pursuit of a more just, anti-oppressive organization, as in the case of RU. For example, the bystander intervention strategies employed by RU are designed to train members on how to implement normative ideological practices. The

trainings themselves are explicit, meaning the system of control is visible; however, as those practices become ingrained, they may become hidden in ways that constitute a powerful system of concertive control. This may be beneficial for members seeking to combat ingrained white supremacist ideologies by instantiating anti-oppressive practices. There may be ironies emerging from this situation of employing concertive control in pursuit of liberatory practices.

Another area for exploration could be the use of strategic ambiguity and concertive control—for example, RU's guiding principle of "progressive values." RU members used the broad umbrella of "progressive" ambiguously to create a large umbrella ideology encompassing a diversity of Left-leaning political perspectives. However, the way the term is used in practice could represent a form of concertive control—members may imbue the term with meaning that, while hidden beneath the surface, still forms as a type of control over who belongs or does not belong under the organizational umbrella.

2. Narrative as a Strategy to Manage Strategic Ambiguity.

Strategic ambiguity in RU created a large umbrella covering a crowd of people with varying political identities. Negotiating that multiplicity requires communicative work by members. RU members suggest that one way to manage the multiplicity is by weaving together various threads in what Crystal called a "tapestry" using narrative. Previous research explores the notion that narrative can be used to weave together personal and collective identities in a social movement (Jacobs, 2002) and activist organizations (Brown, 2006). Brown (2006) argues that a narrative approach is especially helpful for countering the false notion that collective identities are relatively homogenous and helps capture the interplay among multiple strands of identity.

Building on existing work, an interesting area to explore would be the use of narrative as a tool for negotiating strategic ambiguity in a distributed organization like RU. Narrative may help to not only negotiate membership, but also the purpose and mission of an organization. For example, RU's broad missions of "promoting a progressive agenda" and "empowering grassroots leaders" may be contoured and negotiated through the sharing of narratives about various campaigns, victories, and impacts.

Theoretically, exploring areas of alignment or divergence in members' narratives could be useful for researchers seeking to understand how members negotiate strategic ambiguity. From a practical perspective, paying attention to narrative may help organizations who maintain strategically ambiguous missions like RU's to follow the lead of their members as members produce and share their own organizational narratives, and members may be able to make sense of a multiplicity of perspectives and aims through narrative frameworks.

3. The Power of Trauma in Constituting Organizational Identity.

As discussed above, RU emerged from a political context marked by collective trauma—a situation in which many people saw their rights and liberties threatened, either for the first time or in a fresh wave of an ongoing assault; the 2016 election also stirred up past traumas for many individuals, including traumas relating to race-based or gendered violence.

Kim (2012) illustrated the ways in which cultural trauma constitutes racialized identities, specifically examining the case of Korean-American Angelenos responding to the collective experience of the 1992 Rodney King riots. If trauma can constitute cultural identities, is it possible that there is also a constitutive effect on organizational identities?

While RU members represent an overwhelmingly privileged group of people, other organizations similarly emerge from traumatic events and may be even more deeply marked

by the impact of those traumas. Two recent examples come to mind: the Black Lives Matter movement responding to the brutalization of Black and brown bodies by the police state, and the Me Too movement responding to pervasive gendered and sexualized violence. Both of these movements have crystallized to include some organizational structure, including local activist groups and, in some cases, more formal structures (for example, the Times Up organization). In what ways are these organizational structures constituted through collective trauma?

And, if organizational identity can be constituted through trauma, what are the implications? Does the trauma push out other elements constituting identity? Does it—as in the case of individuals experiencing trauma—constitute identity in a way that can have profoundly negative implications? What happens when an organization constituted through trauma becomes professionalized—specifically, when professionalization begins to sideline the emotionality of the traumatic experience? Because past traumatic experiences can be highly relevant to activist organizing, these questions may be especially pressing in activist organizations.

4. Social Movements and Organizations.

The key feature that distinguishes social movements from other collectivities is their extra-institutional behavior (Snow & Soule, 2010). To varying degrees, social groups engage in some activity that is not sanctioned by formal authorities or conducted through formal organizational channels. Such activities include protests, rallies, and marches; sit-ins or takeovers of public or quasi-public spaces; boycotts; and encampments. Though social movements may sometimes operate within institutional bounds, their action repertoire generally focuses more heavily on such extra-institutional behavior. Social movements are

generally positioned outside of legitimate authority structures either because they lack access to or have chosen to operate outside of them.

To clarify these features, social movements may be contrasted with interest groups. Interest groups are generally regarded as legitimate actors embedded in the political system (Snow & Soule, 2010). They have access to legitimate systems of authority and work inside these systems. Though they may occasionally engage in extra-institutional activity such as protests, their action repertoire is generally focused on institutionally-sanctioned activity such as lobbying and soliciting contributions.

Though conceptually and practically distinct, social movements and interest groups may work alongside one another to accomplish shared goals. As the case of RU shows, a social entity may constitute both an interest group and a social movement simultaneously, exhibiting contradictory elements of each, as RU did in the early period of its existence. Though RU formalized and shifted away from extra-institutional activities, the early period of disruptive protest combined with institutional action provides a flashpoint begging for exploration.

Though their goals and repertoires of action may differ, the structures of social movements and hybrid organizations may share some key similarities. Organizations have traditionally been viewed as more bounded and formally structured than social movements. Social movements are more complex entities with somewhat more fluid structures, sometimes comprised in part by one or multiple formal organizations. Scholars have identified organizations as *components of* movements, or existing at a level below the movement level (Gamson, 1991). However, as scholars' understanding of organizations expands to incorporate newer informal, networked forms of organizing the distinction is

increasingly blurred. RU, for example, involved a large network of individuals, many of whom were situated in relatively autonomous groups; structurally, those groups are similar to tightly coupled movement organizations. Whereas once a structure involving formal organizations and networks of individuals might have constituted a movement, the same structure might now constitute an organization.

Other similarities also exist, such as the trend toward professionalization that has occurred in both social movements and in constituent-based organizations, and the related tendency for more professionalized movements and organizations to adopt more mainstream repertoires. Furthermore, both movements and organizations wrestle with the Goldilocks problem. Like constituent-based organizations (discussed in the literature review), social movements, too, must balance the need to incorporate some formal structure with the competing need to maintain some informality.

If hybrid organizations and social movements do share some similarities, then bridging organizational and social movement studies could greatly enrich our understanding of both. For example, the present work on professionalization and volunteerism in RU could contribute to understanding how SMO leaders interact with networked leaders in movements.

Taking a constitutive approach to movements, drawing on the communication constitutes organizations (CCO) approach, offers a distinctive avenue for understanding of the movement-organization relationship at the heart of the Goldilocks problem. In particular, the Four Flows model of the communicative constitution of organizations (McPhee & Zaug, 2000) provides a useful framework for tracing structuration processes in movements and organizations in order to examine how organization emerges from social movements and to challenge distinctions between the two. While constructed as an explanatory model to

describe the four general types of communication that constitute organizations, the four flows model can be used as a lens to examine social movements as well. Like organizations, social movements also involve negotiations of membership, though membership may be less clearly or formally delineated; coordination of activity; reflexive processes adjusting structures to better meet collective goals; and positioning relative to other institutions, including adversaries and allies.

Thus, the ways social movements and organizations are alike and different could be explored by using the four flows as an analytical framework to compare and contrast the two types of social entities. Distinctions may be found, for example, in the degree of formality identified in each of the flows.

Another avenue in this same vein would be a network study examining different tie characteristics between movements and organizations. Is it possible that networks display some of the same characteristics? Perhaps, even, social movements and hybrid organizations like RU exhibit similar characteristics, but with closer coupling in hybrid organizations between the central structure and the distributed network. If such similarities are found, there is a pressing need to build bridges between the disciplines of social movement and organizational studies.

### *F. Conclusion*

This project has examined the emergence of Resistance United, a large, hybrid constituent-based organization. RU was shaped significantly by a number of interrelated tensions, including tensions between formal and informal structures, transactional and transformational repertoires, and volunteer and professional leaderships. Those tensions influenced the roles that members enacted and the ways they used those roles to shape

organizational structures. Three and a half years after its inception, RU has developed from a distributed network to a professionalized hybrid organization embedded within a larger movement context. While RU organizers have logged a number of victories, they have also encountered challenges—and some of those challenges relate directly to the trajectory of professionalization. Though the case of RU is distinct in a number of ways, the findings presented in this dissertation may be used to inform other activist organizations facing similar goals, challenges, and patterns.

At the beginning of the first chapter, I posed questions to which we may now have tentative answers, though those answers only give rise to more questions. What is leading people to make more formal commitments to organizational involvement even in an age of networks, checkbook members, and fleeting protest identities? In RU, the source of that commitment seems to have been concrete tools and strategies, beginning with the user-friendly *Guide* laying out reasonable and meaningful tactics and also including face-to-face trainings like the Regional Institutes. What kept those members around after the initial shock of the 2016 election wore off? In RU, the answer to that question seems to be empowerment and relationships with other members.

In RU, empowerment occurred through the *doing* of civic leadership. This was not surprising, but interesting in light of the less organic transformational strategies RU also employed, such as one-on-one conversations and political education sessions. Though those transformational strategies are one way to standardize some best practices, I argue that they may be more transformative to those leading the conversations than for those they are working to engage. The transformative impact occurred not only through leading transformative practices, but also through leading transactional practices. Even when leading

transactional activities like organizing rallies, it appears that those who became involved in leadership roles went through a process of transforming from novice activists to civic leaders. For some first-time leaders, this process was incredibly swift: one day, they were attending the Women's March, perhaps never before having attended a large protest event; the next day, they were starting a Facebook group for a new community activist chapter; just months later, they were leading groups of five or ten or a hundred members.

1. In What Ways Do Formal Organizations Still Matter?

RU shows that one way formal organizations still matter is by getting new activists in the door. They build on the work of networks, which contribute to getting people *to* the door: networks help foment and surface social unrest, enabling mass protests that mobilize hundreds or thousands of potential members. The chaotic site of a rally or protest is the threshold of activism for a first-time attendee; it is the first step, for many, toward deeper involvement. And while deeper involvement *can* be cultivated through networks alone, such as bringing people into mutual aid networks, that work can be resource intensive. Formal organizations can help people cross the threshold and embed themselves in activist communities more efficiently than networks because formal structures have resources that networks do not, giving them the capacity to separate the wheat—the potential leaders—from the chaff.

So, *how* do formal organizations usher new activists across the threshold to leadership? They can provide those novices with tools and resources and give them opportunities to try (and support to potentially fail) in leadership roles. Those novices become leaders while doing, and their leadership is cultivated in part through calling them leaders—there is power in the communicative act of taking up that mantle. Some of those

leaders develop strong community-based groups; some go on to become leaders within a network of community groups; others may outgrow the organization and move on to serve as leaders in the broader civic environment, either by leading extra-institutional activities in a movement context or seeking civic leadership roles by running for office. It may be the case that leaders who developed in more chaotic environments, like the earliest stages of RU, are more flexible and capable of leading outside of the particular organization in which they incubated. Strategic ambiguity, for those leaders, may serve a particularly empowering purpose.

Additionally, organizations may provide resources that enable distributed members—like the RU leaders who were embedded in their home communities across every Congressional district in the U.S.—to come together in face-to-face contexts, strengthening the bonds between members and enabling them to engage in more cohesive distributed work. In RU, the Regional Institutes seemed to serve as key sites for bonding between members by bringing together people who had worked together in distributed contexts (such as over the phone or web) and allowing them to celebrate, plan, and socialize together in person. The emotional, sometimes intimate conversations may have helped foster connections that strengthened members' bonds to one another and facilitated closer distributed organizing once they went home to their local groups.

The emotional weight of face-to-face contact should not be disregarded even with the potential power of distributed organizing. As members arrived at the Regional Institutes, I frequently observed two or more people "meeting" in person for the first time, uttering exclamations such as "it's incredible to finally see you in person!" and immediately embracing, their nonverbals belying the fact that they had never previously met. Upon

departure, members closed out together in sessions that were frequently tearful, heartfelt, and laden with relational meaning. These interactions signify bonds that may not have manifested in the same way without the face-to-face interaction, and face-to-face interaction can be resource intensive. Many RU activists would not have been able to pay their own way for the Institutes, let alone organize the Institutes without National support. National provided resources for any member who needed funding support in order to attend and footed the bill for the conference centers, most meals, and basic materials like notepads, pens, and poster boards. Providing the resources that enable members to cultivate relationships among themselves may be another critical function of formal organizational structures in the networked organizing world.

Even today, then, employing structures that differ significantly from traditional federated organizations, formal hybrid organizations may function as sites—potentially large-scale sites, like RU—in which to cultivate civic leaders. Questions remain, such as: Could organizations like RU thus help rebuild institutions? Or might they create new, networked forms of solidarity? If they cultivate new networked forms, will those become institutionalized through the (re)production of increasingly formal structures and in the face of economic pressures?

If a key benefit of formal organizations is incubating civic leaders who will lead not only within the organization but also in their communities, it is possible for organizational commitments to overburden participants. Activist labor may become too focused on organizational survival; repertoires may be employed in the pursuit of organizational goals at the expense of movement goals. A focus on short-term goals like elections is necessary to demonstrate the quantifiable success necessary to garner philanthropic support; yet such

short-term focus points instantiate and (re)produce repertoires that then constrain members' abilities to take on larger goals. They may also increase the potential for disenchantment if the short-term goals go unmet (e.g. a lost election) and long-term goals are not foregrounded.

Furthermore, becoming committed to an organization may paradoxically stunt a leader's growth in alternative repertoires. In RU, members quickly became accustomed to the transactional repertoire, and those patterns contributed to (re)producing structures that facilitated transactional activities; the transformational repertoire was, as a result, stunted. How can that paradox be overcome?

One way to overcome these challenges might be to de-couple organizational activities from funding structures in order to maintain focus on big-picture, movement-level goals. De-coupling organizational activity from funding structures would, for example, have freed RU staff to encourage broader autonomy among group leaders rather than encouraging group leaders to engage in quantifiable activities that could be used to garner additional funding. How, though, can organizations de-couple their activities from their funding?

Another idea is to de-couple leadership potential from empowerment caps imposed by organizational structure. That is to say, it may be beneficial to allow—or even enable—leaders to outgrow the organization. Formal structures may be highly effective for ushering participants across the threshold from civic observer to community leader, but, once a community leader is born, the rigidity of formal structures—including ingrained repertoires—may stunt their long-term leadership potential. Encouraging leaders to outgrow the organizational context goes against organizational interests: it requires prioritizing movement goals over organizational goals. It requires recognizing formal organizations as truly a breeding ground for, rather than culmination of, activist training and leadership. It is

almost certainly an impossible goal when organizational survival hinges on the quantifiable activities of members; the capitalist funding structure is simply not conducive to prioritizing movement-level goals over organizational ones. So again, how can organizations de-couple their activities from the funding ecosystem? Is there potential in networks to create new funding structures, or will networked funding structures like crowd-sourcing adhere to the same market-based logics as formal organizational funding structures?

2. Hybridity and the Post-COVID-19 World.

The devastation wrought by the novel coronavirus (COVID-19) provides a bleak but interesting context in which to study emergent hybrid organizing and, potentially, alternative organizing structures. As I finish this dissertation, global society teeters at the height of the coronavirus pandemic (or at least, at the height of the first wave) and the future remains highly uncertain. What does seem likely, though, is that we will be entering an era of increasingly distributed organizing. During the pandemic, more people have begun to work from home; distributed structures have been put in place that may scaffold ongoing work-from-home and distributed organizing practices even when face-to-face contact is once again safe, meaning more people growing accustomed to technologies such as video conferencing that enable a wider swath of the population to engage in distributed work. These basic skills can be applied to constituent-based organizing as well as formal work. Furthermore, grassroots organizing has not stopped in light of the physical distancing requirements—instead, organizers are drawing on the distributed, networked side of hybrid organizing practices, discovering new and innovative ways to harness energy in pursuit of shared goals (Chenoweth et al., 2020).

If anything, the COVID-19 pandemic may usher in a new era of activism, as the virus has shed harsh light on the inequities inherent to current systems and that light may breed increased political engagement. Millions have been thrown into unemployment (Kucik & Leister, 2020, April 22); students and low-paid workers have been hit far harder than higher earners, especially in the service sector (Burch, 2020; Morath & Geintzeig, 2020); young adults are especially burdened due to existing debt (Popper, 2020); tensions have increased between landlords and tenants ("Landlord-Tenant Disputes in LA Triple Amid Coronavirus Pandemic," 2020) and serious efforts are being undertaken in the U.S. to organize rent strikes; workers in traditionally under-appreciated jobs such as grocery clerks and truck drivers have been lauded as "heroes" (Capatides, 2020) even as they have faced mistreatment at work and found crucial opportunities to demand protection of their rights (Covert, 2020); large-scale, catastrophic mismanagement of the crisis by the federal government (Rushe & Aratani, 2020) has reverberated through society, impacting people who might previously have felt that politics had nothing to do with their lives; and unprecedented authoritarian threats by the president have raised concern even among the political mainstream (Packer, 2020).

In response to these rising tensions and heightened salience of long-worsening social problems, people have turned to innovative forms of protest. Some have, for example, staged protests at which all participants stand on marks placed six feet apart in observance of social distancing guidelines (Trew, 2020). Others have staged "drive by" protests at which all participants remain in their vehicles (Hardison, 2020). Many others, including RU, have taken to the internet, shifting more of their organizing to online platforms.

Taking a different perspective on the crisis, other Americans—mainly Trump supporters—have staged protests *against* public health and safety measures such as mandatory social distancing in states across the country ("What and who is behind the US anti-lockdown protests?" 2020). This may suggest a deepening of stark social divides that are not only political, but also epistemological and axiological, centering on the question of whether policies should be guided by science or by faith.

Furthermore, business managers and corporations have responded to increased workplace organization through such tactics as heat mapping, which Whole Foods has used to track which stores may be most likely to attempt unionization (Peterson, 2020), disseminating anti-union messages to employees, as in the case of Trader Joe's (Sainato, 2020), and using police to engage in military surveillance of employees engaging in unauthorized strike activity (Gurley, 2020). What these emerging stories suggest is an era of increasing unrest and contestation, marked by environmental and social factors that call for innovative new protest strategies.

With the likelihood of ongoing challenges resulting from the pandemic, including the potential for rolling lockdowns to deal with future resurgences of the virus (Sridhar, 2020), organizations will need to be more flexible in their approaches to collective action; members will need to be able to shift between traditional face-to-face repertoires and the types of repertoires that adhere to social distancing guidelines, such as online or other creative possibilities. They will also, perhaps more challengingly, need to find new ways to engage in deep transformational organizing from a distance: face-to-face organizing conversations, storytelling circles, and community-building social events may need to occur over video chat

or other modes that account for physical distancing guidelines. How will transformational repertoires manifest online, and with what success relative to face-to-face versions?

Some commentators argue that activities like the formation of mutual aid pods, mass donations and distribution of PPE by informal groups, and other networked activities "are likely to strengthen civil society and highlight political and economic issues in urgent need of change" (Chenoweth et al., 2020, np). As government institutions become increasingly unreliable, it is possible that, as these commentators suggest, communities will turn to themselves for economic and other forms of support. As they do, organizing structures like mutual aid pods and neighborhood networks will continue to emerge. My findings suggest that these structures may provide opportunities for community members to take up the mantle of leadership and, in doing so, learn to lead by doing. In mutual aid pods and networked structures, will leaders develop in similar ways at those in RU who were scaffolded by formal structures? What role, if any, will formal organizing structures play?

The pandemic may represent a system-level critical incident giving rise to the conditions from which a new cohort of leaders may emerge, and formal organizations may be able to contribute to this process. People spurred to activism for the first time as a result of the pandemic may struggle to find an outlet for their activism without adequate tools and resources; organizations can help provide them the tools and resources they need to become leaders. Furthermore, the pandemic may be an opportunity for leaders who have matured during the first term of the Trump administration to take the next step in their leadership development process.

Finally, though mutual aid and community-based structures may begin as informal, it is possible they may become formalized. Should this happen, organizers would do well to

consider the tensions discussed in this dissertation, including the tensions between formal and informal structures, transactional and transformational repertoires, and professional and volunteer leaders. To build enduring, effective organizing structures, civic activists will need to negotiate those tensions even as they do the work of activist organizing—or, in the words of an RU member, they will be "building the plane while flying it."

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Appendix A. Interview schedule for members of the Organizing Team.

**Interview Schedule: Organizing Team**

Tell me how you came to work with Indivisible, up to the point that you were hired.

What has your experience been like since you started working with Indivisible?

What similarities does this work have to other organizing work you've done? Differences?

What is your daily work experience like?

Tell me a little bit about the work you do with local groups and group leaders. What does that work look like?

What are Indivisible's goals now, and how have those changed?

In my research, I've identified multiple leaderships within Indivisible, including local group leaders and National staff. Thinking about what it takes to accomplish Indivisible's goals,

- What role does the organizing team play?
- What role do the group leaders and members play?
- What role do other national staff play?
- How do those leaderships interact?

What sorts of tensions do you face as you work to accomplish those goals? (By tensions, I mean push-pull forces that might arise during organizing.)

In your words, tell me why the work that Indivisible does is important.

What do you see as the long-term impact of Indivisible's work?

Is there anything else that I've left out or missed, or anything else you'd like to add?

Appendix B. Interview schedule for local group leaders.

**Interview Schedule: Local Leaders**

Tell me how you came to be involved with Indivisible.

[If they have done organizing work before:] What similarities does this work have to other organizing work you've done? Differences?

Tell me about the structure of your local group.
(Probe question: Are there leaders, and if so who? What are their roles? What other roles do people have?)
(May be helpful to ask them to draw the structure)

How did this structure develop?
(Probe questions: Thinking back to when the group started, what roles did people play and how did those change or become formalized? How were decisions made about group structure and processes?)

What goals does your Indivisible group have?

What sorts of tensions do you face as you work to accomplish those goals? (By tensions, I mean push-pull forces that might arise during organizing.)

In my research, I've identified multiple leaderships within Indivisible, including local group leaders and National staff. Thinking about what it takes to accomplish Indivisible's goals,

- What role do the group leaders and members play?
- What role do national staff play? (Probe: organizing team? Other National staff?)
- How do those leaderships interact?

Thinking about Indivisible's development over time, what have been some key moments or choice points?

Is there anything else that I've left out or missed, or anything else you'd like to add?

Appendix C. Interview schedule for National staff (non-organizing team).

**Interview Schedule: Non-OT National Staff**

What is your title/position in the organization? Can you describe that position for me?

Tell me how you came to work with Indivisible, up to the point that you were hired.

What has your experience been like since you were hired to work with Indivisible?

What similarities does this work have to other work you've done? Differences?

What are Indivisible's goals now, and how have those changed?

Tell me a little bit about the work you do, if any, with local groups and group leaders. What does that work look like?

In my research, I've identified multiple leaderships within Indivisible, including local group leaders and National staff. Thinking about what it takes to accomplish Indivisible's goals,

- What role do the group leaders and members play?
- What role do national staff play? (Probe: organizing team? Other National staff?)
- How do those leaderships interact?

What do you see as the long-term impact of Indivisible's work?

In your words, tell me why the work that Indivisible does is important.

Is there anything else that I've left out or missed, or anything else you'd like to add?