

**The Duality of Niche and Form:
The Differentiation of Institutional Space in
New York City, 1888-1917**

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Arthur Stinchcombe's classic essay "Social Structure and Organizations" (1965) set the agenda for much that has happened in organizational theory over the last forty years. Stinchcombe wanted to understand "the effect of society on organizations," and "the effects of organizational variables on the surrounding social environment" (1965, p. 142). His essay pointed the field away from the study of organizations toward the study of organizational forms, arguing that there is an essential duality between the kinds of organizations that exist and the institutional space that they occupy. Simply put, social structures produce organizational forms but, at the same time, organizational forms create social structures. By the early 1980's two new research programs had coalesced in organizational studies, each taking up one side of Stinchcombe's commission. Ecologists initially focused their attention on how organizational forms affect the institutional environment while the new institutionalists were mostly concerned with how the institutional environment affected the character of organizational forms. As is generally true with new intellectual endeavors, scholars from these two camps initially narrowed their focus as they sought to clear the underbrush from around their turf, ecologists by emphasizing empirical models of organizational demographic change, the institutionalists by operationalizing new measures of cultural dynamics within an institutional space. Within a short period of time each group could point to solid successes — clear methodological projects, meaningful theoretical advances, classic essays and well established professional communities that have continued to generate innovative research findings over this last quarter of a century. The full realization of Stinchcombe's vision awaits the development of yet another project, however, one that would incorporate the insights of both ecologists and institutionalists and tie together the systematic study of organizational forms with a nuanced empirical analysis of institutional environments. The possibility of such a rapprochement has long been in the wind and productive cross-fertilization has been an ongoing ambition of scholars from both research communities but a number of fundamental research dilemmas remain.

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Our chapter is concerned with one such dilemma initially highlighted by Hannan and Freeman some twenty years ago in a paper entitled, “Where do organizational forms come from?”¹ In that essay Hannan and Freeman proposed to answer the question suggested in their title through the development of a new research program that would analyze how organizational forms are arrayed within institutional space. In the nearly two decades that have passed since that paper first appeared, the project has yet to be realized, in spite of some promising recent contributions. In this chapter we offer a new approach to the problem, one that is shaped by our own background in the formal study of culture.

We begin from the assumption that institutions are fundamentally meaningful constructs and that organizational scholars cannot advance an effective explanatory science if they fail to give meaning its due. As formalists we also believe that meanings themselves (and not simply their effects, their residues or their second order associations) are accessible through quantitative analysis. We take this perspective and we put it to work in this chapter, showing how institutional space can be modeled in such a way that the meaningfulness of organizational activities becomes the starting point (not the after thought) for an empirical investigation of ecological dynamics. Our main substantive contribution is to demonstrate a procedure for locating organizations within a semiotically defined relational space. Having defined the space, various measurement strategies become available to us. In this paper we borrow the analytic logic of Miller McPherson (1983) to construct a metric for assessing the location of niche boundaries within the discursive field. We apply these procedures to map the institutional ecology of social welfare organizations in New York City between 1888 and 1917. The results help explain the outcome of a historiographic conundrum, how it is that scientific charity organizations came to dominate and displace settlement houses in the battle for control over the American social welfare sector during the Progressive Era. Ultimately our goal is to contribute to the development of a research strategy that more adequately captures the mutually constitutive relationship that links social structure with organizations, what Hannan and Freeman describe as the duality of niche and form. Our paper proceeds in four stages. First, we discuss the duality problem as it has been handled in ecological and institutional studies.

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Then, we identify key tools and arguments. We report on the empirical case of the charity organization sector. And, finally, we discuss the implications of our findings and identify potential contributions of the approach.

The Duality of Niche and Form

Hannan and Freeman begin their (1986) essay by acknowledging a critical limitation of their original research program — organizational forms, a key concept for ecologists, were not subject to direct empirical analysis. What ecologists studied were temporal variations in the foundings and failings of organizations that had been pre-designated as instantiations of a given form. This leads to two problems. First, because their specification is not formally derived, the identification of organizational forms remains an imprecise analytic maneuver beholden to the careful application of folk taxonomies of various sorts. Since any misspecification would lead to less efficient explanatory models (through the inclusion of organizations that were not in fact of a common unitary form), ecologists face the possibility that their empirical findings can be compromised by the lack of formal procedures for identifying forms. The second problem is that because niche boundaries are not directly measurable there are a host of theoretical issues (questions of competition and niche overlap, for example) that have only been accessible to formal investigation through the use of elaborately ingenious inferential analyses. Hannan and Freeman's proposed remedy was thus radical precisely because it marked a departure from their own original ecological program.

In the 1986 essay, Hannan and Freeman distinguish between two approaches to defining organizational forms. "One ... proposes an analogue to the genetic structure that reproduces biotic forms ... organizational forms (can) be defined ... as instructions for building organizations and for conducting collective action" (p. 56). Hannan and Freeman identify their own early work (1977) with this perspective and also include McKelvey and Aldrich (McKelvey 1982; McKelvey and Aldrich, 1983) as exemplars of this type of thinking. In contrast to this genetic conception, Hannan and Freeman embrace an alternative approach in the 1986 essay that they label a duality

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perspective. This “approach tries to identify forms in terms of the niche structure of populations” (p. 57).² Unlike the genetic approach that sees organizational forms as defined by intrinsic attributes of the organizations themselves, the duality approach views forms as defined by features of the environment. They offer two examples of scholars who have pursued such a vision, Miller McPherson and Paul DiMaggio.

McPherson is a leader (indeed a founder) of modern community ecology studies. He looks at voluntary associations within a single community that are dependent upon membership recruitment (fraternal organizations, youth service organizations, professional associations and the like) and seeks to understand how these organizations compete over a finite number of potential members (McPherson, 1983). The distinctive feature of McPherson’s work is that he conceives of the organizational environment as a multi-dimensional space defined by the relevant attributes that differentiate members from one another (their age, income, occupation, gender, etc.). He locates each organization in that environmental space by measuring the average values of its membership (including 1.5 standard deviations on either side of the mean) on each of these demographic dimensions. McPherson demonstrates that the resulting hyper-volume is a useful approximation to the realized niche for a particular organization. From Hannan and Freeman’s perspective, this is an approach that directly responds to their concerns. Not only does this procedure enable one to empirically map out an organization’s niche boundaries in organizational space, it has the added advantage of facilitating the empirical assessment of interorganizational competition through the direct computation of niche overlaps. McPherson’s project is an exemplar of a duality approach because he begins from the assumption that an organizational form is analytically defined by its niche footprint in a resource environment. Niches define forms.

DiMaggio is a leader (and one of the founders) of modern institutional analysis whose work was also identified by Hannan and Freeman as an exemplar of a duality approach. The reference here is to an argument made by DiMaggio in “Structural Analysis of Organizational Fields,” his (1986) essay about the potential uses of blockmodels in organizational science. A blockmodel is a method of data analysis that derives from the social network tradition. The goal of

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a blockmodel is to cluster individuals that are “structurally equivalent” together into groups (blocks) and then to identify the structural arrangements that define the blocks. Members of the same block are thought of as occupying a common role position within the social network. Role is defined in structural terms, as a common type of location within the network space. A key analytic concept is structural equivalence which is operationalized as the sharing of common patterns of relations with other individuals vis-à-vis the broader network. DiMaggio applies this thinking to the questions raised by ecologists. He argues, “(t)he population-ecology definition of form as ‘common fate with respect to environmental variations’ (Hannan and Freeman, 1977, p. 929) is based firmly in the logic of structural equivalence: Organizations that share a common fate are those that depend on the same external actors. A niche is any set of resources that supports a population. A form is any set of organizations that occupy the same niche” (DiMaggio, 1986, p. 360). DiMaggio then shows how a blockmodel analysis could be used to empirically identify organizational forms in a market by analyzing the pattern of which organizations sell products to which other organizations. This work also exemplifies a duality approach in the sense that information about an organizational niche (defined here as the set of organizations that purchase goods from the same sellers) is used to empirically identify those organizations that should be classified as sharing a common organizational form (e.g., those sellers that service the same niche).³ Again, this is a duality strategy to understanding organizational forms because the niche defines the form.

Both of these exemplar projects embody particular attributes. First, data collected from the organizations is used to define the character of the organizational space. This is most evident in DiMaggio, for whom the environment is literally defined by the organizations contained within it. But it is also true of McPherson for whom the environment is defined by the attributes of members of the organizations in the field. Second, the organizations’ location within the environment is relationally defined such that each organization’s place can be identified relative to every other organization in some meaningful way.⁴ Third, a dual ordering is implied in each case according to which the organizational form is defined by the niche while the niche is itself defined by the

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organizations contained within it. This last point is particularly reminiscent of a formal conception of duality that was originally articulated by Breiger.

Drawing on Simmel's discussion of the relationship that inheres between individuals (who make up groups) and groups (which are made up of individuals), Breiger (1974) developed a formal theory and a set of methods for analyzing duality relationships as a particular type of structural phenomena. The key was his demonstration that there were two distinct but mutually constitutive social orders involved, a structure of individuals (the interpersonal network) and a structure of groups (the intergroup network). These two structural systems were distinct in that they represented different orders of social phenomena (individuals vs. groups), they were of different dimensions (the number of individuals was different than the number of groups) and their internal structures differed (the pattern of internal connections varied). At the same time, the two structures were completely derivable from one another because the linkages of the one constituted the elements of the other. They were, in effect, mutually constituted.

While neither McPherson nor DiMaggio employ Breiger's precise formulation in their approach to the duality of niche and form, their projects are quite reminiscent and indeed, clear lines of influence can be identified in both cases. McPherson's hypernetwork sampling paper (1982), where he first laid out his idea for a study of the duality of individuals (members of the voluntary associations) and groups (the organizations themselves), builds on Breiger's work explicitly and that work is carried over as the conceptual (and methodological) pre-condition for McPherson's essay (1983) on niche overlap. DiMaggio's approach to the duality of niche and form also shows traces of Breiger's influence. Though blockmodels make use of a different analytic, both methods emphasize strategies for mapping out structural continuities between individual and aggregate level data and, indeed, Breiger was a co-author on one of the original blockmodel essays (White, Boorman and Breiger, 1976).⁵

Does this mean that Hannan and Freeman (1986) intended to invoke a similar construct when they spoke of the duality of niche and form? Although their choice of intellectual allies and their assertion that "(t)here is a fundamental duality here: niches define forms and forms define

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niches” (Hannan and Freeman 1986, p. 57) would seem to imply something of the sort, in fact they turn in an all together different direction. Drawing inspiration from the work of Fredrik Barth, a demographer who “turned the problem (of studying ethnic differences) on its head, treating the boundaries as the primary social phenomena and cultural content as a by-product of boundaries” (1986, p. 60), Hannan and Freeman propose “... a parallel shift toward boundary-based reasoning in identifying and classifying organizational forms” (Hannan and Freeman 1986, p. 60). They thus renounce both attribute based and relational approaches in favor of a focus on boundary processes. In particular they suggest a program of study concerning processes that lead to the blending or segregating of boundaries between organizational forms. The remainder of their paper contains an astute taxonomy of these processes that draws liberally from a range of organizational theories and perspectives. Thus technological factors, transaction costs, the closure of social networks, successful collective action and various types of institutionalization are all cited as examples of segregating processes. While entrepreneurial activities, copying mistakes, random drift, mimetic isomorphism and deinstitutionalization are all given as examples of processes that serve to blur the boundaries separating particular organizational forms.

This shift toward the study of boundary processes is both engaging and curious at the same time. It is engaging in the way that Hannan’s work often engages, as a clear-headed and analytically elegant statement of phenomena to investigate with methods that are compelling and an explanatory narrative that is reasonable and important. But it is also curious because Hannan and Freeman appear in this maneuver to turn their backs on the issue they raise at the beginning of their essay. For although the conceptualization and cataloguing of boundary processes is smart and useful, it is not a recipe for fulfilling Hannan and Freeman’s professed ambition to reconstitute the empirical analysis of organizational forms on a firmer, more dualistic foundation. There is no new proposal here for linking the study of boundary processes to a concrete analysis of how “boundaries should be drawn in organizational space” (Hannan and Freeman, 1986, p. 59). No new methodological adjustments are made to the basic research program, instead there is a call for increased attention to historical research on blending and segregating processes. “Histories of

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industries, social movements, government bureaus ... are a prime source of information about the boundary processes” (p.68) as are the existence of professional associations, professional journals and the publication of institutional rules such as those that are embedded in federal legislation.

Once this newly motivated historical research has been conducted, once blending and or segregating processes have been identified, then this information is to be brought back to a conventional ecological analysis and tested to see whether “the boundaries coincide with sparse regions in the distributions” or whether the identified “distinctions are reflected in estimates of the underlying dynamics” (p. 68).

Said differently, the promise of a shift towards a duality centered approach is not fulfilled. Instead a strategy is articulated that encourages ecologists to broaden and re-theorize their historical investigations, and thus to add ever more nuanced institutional factors into event history models as control variables used to assess key events in the dynamics of population demographics. In many ways this is precisely what ecologists have done in the intervening years, and their work has clearly advanced as a consequence but the basic dilemma of how to formally analyze the duality of forms and niches remains unresolved. ⁶

Why this shift in ambitions? Hannan and Freeman explain their rejection of DiMaggio’s project by complaining that his procedure (e.g., building a relational matrix of resource ties linking organizations) “may be sensitive to relatively small perturbations in the observable data” and thus “will have difficulty in identifying enduring bases of unit character of populations” (p. 59). They say nothing further about McPherson. But it is not hard to imagine that in both cases Hannan and Freeman are concerned with how to integrate the exacting data demands of these projects into their ongoing research agenda. While valuing what a duality perspective might be able to achieve, we suspect that they could not identify a way to embrace such a project without fundamentally disrupting their ongoing, highly successful program of investigation into the population ecology of organizations.

Several different trajectories have emerged within the ecological tradition since this essay was published and each has pushed these concerns forward in distinctive ways. The study of

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resource partitioning, originally initiated by Carroll (1985), has found increasingly more effective means of measuring and analyzing the differentiation of forms in niche space (e.g., Carroll and Hannan, 1995; Péli and Nooteboom, 1999; Dobrev, Kim and Hannan, 2001). There have also been refinements to the community ecology tradition, both those reflected in McPherson's own research program (McPherson and Ranger-Moore, 1991; Popielarz, and McPherson, 1995), as well as the contributions of others such as Baum and colleagues' (Baum and Oliver, 1992; Baum and Singh, 1994) analysis of how children's daycare centers are distributed across the different age ranges of their clientele. Whole new projects have emerged such as Podolny's work on status competition (1993) that led to the identification of what Park and Podolny (2000) describe as studies of "resource-status space" (looking at hierarchy and product differentiation measures among investment banks). Nonetheless, at least until quite recently, there has not been much substantive progress in resolving the core dilemma of formalizing a duality perspective. Nearly twenty years later Hannan himself continues to complain that "there is little agreement on how to define (organizational) forms" (Hsu and Hannan, 2004, p. 4). Indeed, in their recent essay Hsu and Hannan worry that "...the basic concept of form lacks a clear specification. Current work continues to refer to initial formulations that spelled out only partial definitions (e.g., Hannan and Freeman 1977; 1984). As a result, guidelines for a crucial step in empirical research—the specification of meaningful population boundaries—are less than clear...(this) has become increasingly problematic" (2004, p.1).

Measuring Institutional Space

The fault does not lie with the ecologists alone. Indeed, one could say the real problem is with the institutionalists. From the beginning, institutional theorists understood organizational environments as cultural systems that consisted of taken-for-granted sets of understandings about what kinds of things exist, what kinds of practices might be deployed and what kinds of rationales could be offered to legitimate actions taken (Meyer and Rowan, 1977; DiMaggio and Powell, 1983). In 1986, as Hannan and Freeman sought to ground their studies of forms in measures of

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organizational space, they obviously sought to incorporate institutional thinking and did what they could to integrate those insights into their taxonomy of blending and segregating processes. What they could not do, however, was borrow a set of methods for analyzing institutional space in a systematic way. The problem was that, just as ecologists had built their project around a set of unmeasured core concepts, so too had the institutionalists constructed a research program that measured various things (most notably manifestations of institutional isomorphism), but not their core construct itself, not the cultural contents of an institutional environment (Mohr, forthcoming-a).

In this respect, institutional theory paralleled the rise of cultural sociology itself. Beginning with Peterson's (1979) manifesto, the sociology of culture once again began to emerge as a central concern of American sociologists but the measurement strategies advocated by most first generation new cultural empiricists were focused on demonstrating the effects of cultural phenomena rather than on directly measuring cultural meaning systems themselves (Friedland and Mohr, 2004). It wasn't until the early 1990's that American sociologists began to apply formal methods to problems of cultural interpretation in a sustained or systematic way (Mohr, 1998). The same was true in organizational science. Abrahamson published an early paper (1991) that analyzed the content of journal articles in order to track the diffusion of ideas about management practices. Other papers by Barley and Kunda (1992) and Shenhav (1994, 1995) used formal methods of content analysis to study historical cycles in management ideology. Porac and colleagues (Porac et al, 1995, 2000) devised a set of formal methods for measuring shared meaning systems at the industry level. Mohr (1994) used blockmodels to study field level discourse systems. Orlikowski and Yates (1994) analyzed email messages to analyze communication genres. By the mid 1990's the systematic use of formal methods to analyze cultural content had become an acceptable strategy for organizational analysis (see Ventresca and Mohr, 2002, for a review of these developments).

The emergence of a set of measurement strategies for analyzing cultural content set the stage for a more effective approach to the duality of niche and form. Martin Ruef's work provides an example. Ruef (1999, 2000) draws upon these developments in cultural sociology to devise a project that systematically interrogates a database of professional literature in the health care sector

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so as to be able to empirically track the emergence and shifting character of institutionally recognized organizational forms. Other work by Zuckerman and colleagues on the securities (1999, 2000) and film industries (Zuckerman, Kim, Ukanwa and von Rittman, 2003) and by Rao and colleagues (Rao, Monin and Durand, 2003) on French chefs has focused attention on formal measures for analyzing the cultural logics that underlie organizational environments. And a series of new papers by leading ecologists (Pólos, Hannan and Carroll 2002; Hannan, Carroll and Pólos, 2003; Hsu and Hannan, 2004) lay out an ambitious agenda that includes a number of intriguing propositions about the systematic study of organizational identities which they define as “social codes, or sets of rules, specifying the features that an organization is expected to possess. Those codes represent the default expectations held by audiences about organizational properties and constraints over properties” (Hsu and Hannan, 2004, p. 4).

While these are encouraging developments, none of these projects fully conform to the conceptual demands proposed earlier for a formal theory of the duality of niche and form. If our earlier assessment is correct then we should be in pursuit of an analytic project that: (1) uses data from organizations to concretely define the organizational space, (2) enables organizations to be defined relationally vis-à-vis one another and, (3) is dually ordered. Though Ruef (2000) comes the closest (and by our assessment, is the most sophisticated), there is a loose coupling between the data he employs for measuring institutional space and his measures of the organizational populations under consideration.

We see our own project in this quite specific sense as being a step closer to a formal analysis of the duality of niche and form. In what follows we make use of information on a particular set of organizations and, like DiMaggio, we construct relational measures on the basis of concrete ties linking these organizations to one another. Unlike DiMaggio, however, we do not use information on inter-organizational exchanges but rather focus on how organizations locate themselves vis-à-vis one another within a set of interlocking discursive fields. Like Hannan and Freeman, we focus on “claims used to mobilize resources” (1986, p. 57) but unlike them we believe that the meaning of those claims has to be empirically assessed by attending to how they are

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embedded within broader institutional systems of meaning. Like DiMaggio we construct an inter-organizational matrix but instead of generating aggregate clusterings (blocks), like McPherson, we construct a dimensional space within which the niche footprints of particular organizational forms can be identified.

Our approach is conditioned upon two basic insights borrowed from cultural sociology. First, by our reckoning, it is essential that any formal approach to the study of institutional space embrace a relational perspective. This is because the cultural foundations of an organizational field are built upon semiotic systems. Semiotic meanings are not inherent or naturally given, they are constructed out of patterns of similarities and differences (Saussure, 1959). To understand the meaning of any construct embedded within a semiotic discourse, it is necessary to see how that construct is defined by the relations of similarity and difference to other elements within the same semiotic system. Second, just as there is a duality that inheres between a niche and a form, so too are there dualities that operate within systems of discourse. Of these, the most critical is the duality of culture and practice (Bourdieu, 1977, 1990). Breiger's conception of duality applies here as well. Practices are meaningfully differentiated from one another by their connections to relevant cultural categories just as, dually, the cultural categories themselves are linked by relations of similarity and difference defined by their articulation within systems of practice (Mohr and Duquette, 1997; Breiger and Mohr, 2004). Thus as Freidland and Alford (1991) have argued, the key to analyzing the logics that underlie institutional fields is to understand the duality that links categories of cultural forms to repertoires of organizational practice. To measure institutional space, we bring these principals to bear on data that illuminates how specific organizations have meaningfully located themselves within a set of shared and contested practical understandings.

Poverty Relief and the Progressive Era

The field of social welfare in New York City at the turn of the last century is an especially rich site to investigate the relationship between organizational forms and institutional environments. In the several decades bracketing the end of the nineteenth century, older, more traditional

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organizations were rapidly being displaced by newer more “scientific” bureaucracies. An intense period of competition ensued during which a wide variety of organizations were invented, transformed or abandoned, and heated disputes surged back and forth over precisely how community social welfare issues ought to be addressed. Two tightly inter-connected systems of cultural discourse were particularly salient. One distinguished among the types of people who were being served by relief organizations and another differentiated among the types of needs that brought these people into the social welfare system.

The discourse concerning people presumed a complex taxonomy of social statuses. The young were distinct, the old were distinct, men were differentiated from women, mothers were distinguished from fathers. Race, class, ethnicity, religious and occupational statuses, all of these distinctions and more were highlighted in the debates over how to understand the essential character of this institutional space. Embedded within these classificatory logics were implicit assumptions about which statuses were similar or different from one another, what ways they were similar or different, and what sort of merit should be accorded to each (Mohr, forthcoming-b). This is the type of classification system that Theda Skocpol (1992) described when she argued that two statuses — soldiers and mothers — were conceived to be especially meritorious and worthy of relatively generous public relief around the turn of the last century.

The other fundamental discourse system concerned the types of needs and social problems that were presumed to exist. During this era American reformers were concerned with a wide variety of community social welfare issues: the needs of immigrants (Boyer, 1978; Lissak, 1989; McBride, 1975), the unemployed (Keyssar, 1986), the intemperate (Gusfield, 1963), the homeless (Ringebach, 1973), adolescent boys (Macleod, 1983), juvenile delinquents (Platt, 1969), and unmarried mothers (Kunzel, 1993) were just a few of the concerns that preoccupied welfare activists during these years. As Nancy Fraser (1989) argues, discourses about the nature of social needs are fundamental components of social welfare systems because the interpretation of needs and of how people of various status identities are linked into needs discourses (men vs. women, for example) has a profound impact on the ways in which individuals are treated by organizations in this field.

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Just as there are complex discourses on people and their needs, so too are there nuanced understandings about the wide range of things that might be done to people. Thus the repertoire of organizational activities that are conceivable, the range of possible treatments that individuals might be subjected to, makes up a second (and dually ordered) dimension of this institutional space. Organizations can provide advice, training, moral scrutiny or incarceration. Individuals can be given material aid (food, clothing, medicine) or they can be given money. Assistance can be granted freely or it can be based on a requirement that work be performed. Aid can be offered on a temporary or on a sustaining basis, provided in a respectful or demeaning fashion. These qualities do not exist abstractly, however; they are encoded within the particular set of practices that exist within an institutional field at a given moment of time. In New York City at the turn of the last century, able-bodied homeless men could earn one night's stay and a meal from the Charity Organization Society Woodyard by sawing and splitting a quantity of wood; aged homeless men, on the other hand, were incarcerated in the city poorhouse (Katz, 1983, 1986).

As these examples begin to suggest, relief practices are invariably linked to specific categories of persons. The opposite is also true. Differences among person categories are reflected in the variety of relief activities that are recognized as legitimate. Moreover, these linkages are themselves critical aspects of the institutional meanings that come to define the field. Relief practices take on a moral significance once they are associated with a particular category of persons just as the meaning of those person categories is delimited by the kinds of treatments that they are subjected to. Indeed, it is the essential duality of these categories and practices that both defines the institutional logic of a field and creates the tension through which the meaningful character of organizational activity comes to be constituted (Mohr and Duquenne, 1997; Mohr, forthcoming-b).

Data and Method

Our contention is that an analysis of the way in which social welfare organizations identify themselves with respect to these three discourse vectors will provide us with a useful way of measuring how these organizations are embedded within their institutional environment. For data,

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we make use of descriptions that were published in the 1888, 1897, 1907 and 1917 editions of the New York City Charity Directories.⁷ The listing for each organization included information regarding the services provided and the kinds of people who were the intended recipients of those services.⁸ We have collapsed the semantic distinctions into a set of binary variables that indicate whether an organization employed any of 22 service (or technology) categories, 16 status distinctions, or 15 social problems. To simplify our discussion we will refer to these as technologies (T), statuses (S) and problems (P). The appendix lists these variables and examples of the text strings that were used to code them.⁹

These binary variables provide us with a simple means of comparing organizations with one another on the basis of the claims that they make about their relationship to the institutional space.¹⁰ To do this we translate the Directory self-descriptions into an array of TSP combinations. For example, the Midnight Mission (founded in 1867 and operated by the Protestant Episcopal Sisters of St. John the Baptist) published the following description of its activities in the 1888 Directory: “For the reclamation of fallen women; rooms open at all times for conversation and advice; after several months of probation, should a girl remain, a place is found for her in some country town” (Rowell, 1888, p. 371). Here the status, women (S15), and the problem, fallen (P10) are coupled with three different technologies, temporary shelter (T3), character reclamation (T8) and relocation to a place in the country (T15). (See the appendix for the key to variable designations). We code this organization as having three TSP combinations: (S15*P10*T3), (S15*P10*T8) and (S15*P10*T15). Because our goal is to measure the degrees of similarity and difference between organizations we want to compare the Midnight Mission to those organizations that sought to define fallen women according to alternate institutional logics. To do this we need to preserve all of the partial claims that are nested inside an organization's TSP profile. In other words, even if two organizations do not employ exactly the same TSP combinations, we want to know whether they make use of the same elements and thus we include all combinations as well as all component parts in an organization's TSP profile. The full coding of the Midnight Mission is: (S15*P10*T3),

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(S15*P10*T8), (S15*P10*T15), (S15*P10), (S15*T3), (S15*T8), (S15*T15), (P10*T3), (P10*T8), (P10*T15), (S15), (P10), (T3), (T8), (T15).

Note that specific claims about an organization's activities are being measured, not simply the array of Ts, Ss, and Ps that appear in a given description. Accordingly, organizational profiles are constructed to reflect the actual TSP linkages that occur in the narrative. Consider, for example, the 1888 Directory listing for the "Association for Befriending Children and Young Girls" (a Roman Catholic organization, founded in 1870). The text reads: "It gives temporary help by meals, clothing and lodging to out-door poor. A systematic visitation of hospitals and prisons is carried on by ladies connected by the Association . . . Maintains (a) Day School . . . for Italian children (and an) Employment Society (which) helps respectable women in their own homes" (Rowell, 1888, p. 23).¹¹ Here it is the "out-door poor" (P12) who are the recipients of "meals, clothing and lodging" (T10, T11, and T3). Prisoners (P2) and the ill (P13) who are visited (T14), Italian children (S4, S5) who are provided with schooling (T5) and "women in their own homes" (S15) who are given the benefit of the Employment Society (T12). The complete coding for this organization would thus be: (P12*T10), (P12*T11), (P12*T3), (P2*T14), (P13*T14), (S4*T5), (S5*T5), (S15*T12), (S4), (S5), (S15), (P2), (P12), (P13), (T3), (T5), (T10), (T11), (T12), (T14).¹²

We use these profiles as a means of making comparisons between the organizations in the field. There are 283 organizations in the 1888 dataset, so we construct a 283 x 283 square matrix in which each cell measures the pairwise similarity between row organization and column organization. Similarity is calculated as the of number of T, S, P, TS, TP, SP and TSP combinations which the organizations have in common, divided by the total number of T, S, P, TS, TP, SP and TSP combinations in the row organization's profile. Thus the matrix is asymmetric because it allows two organizations to have different levels of similarity with one another depending on the percentage of overlap in their profiles.¹³ To facilitate the interpretation of this matrix we process it with a multidimensional scaling analysis that translates measures of pairwise similarities into Euclidean distances in n-dimensions.

—Figure 1 About Here—

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Figure 1 plots the results of a two-dimensional MDS solution for the 1888 data. The input matrix is too complex to be adequately represented in two dimensions so we employ a five dimensional solution for all subsequent analyses.¹⁴ The two-dimensional solution does have the virtue, however, of providing us with a convenient visual representation of the arrangement of organizations in institutional space and it is therefore worth examining. There are 283 circles in this plot. Each circle represents the location of a single organization within the institutional space. Whenever two circles are near one another it is because the TSP profiles of the two organizations are similar.¹⁵

Because we seek to understand the duality of niche and form, we have identified each organization according to its organizational form and designated it as such in figure 1 by shading each circle according to its form. To make the figure easier to read we have also shaded the region of institutional space occupied by seven of these forms. Like the ecologists, we have relied upon a careful attention to available folk taxonomies in order to make these assignments. We distinguish between 15 organizational forms (two of these, settlement houses and milk stations are not plotted in figure 1 because they arrived on the scene later). For the most part these forms were readily available in the professional (and popular) discourse of the time as indicated by their association with specific linguistic designations (as dispensaries or mission houses, for example), their incorporation into organizational names (Belgian Benevolent Society or St. Agnes Day Nursery) and their use within Charity Directories internal taxonomy.¹⁶ Our category of “Social Work Bureaucracies” is an exception. We use this form to designate the class of organizations that were created by (or were directly affiliated with) the New York City Charity Organization Society. These organizations embraced a particular technology and embodied a distinctive ideology that sought to impose what was then called “scientific social work” on a broad array of impoverished individuals and problems.¹⁷ We will say more about this organizational form shortly.

Jurisdictional Competition and Institutional Space

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Our contention is that the distribution of organizations (and organizational forms) in this plot provides a useful visual (and analytic) representation of how these organizations were arrayed across institutional space. The model meets the requirements we had proposed earlier. We have (1) used information taken from the organizations themselves as a way to concretely define the organizational space, (2) located the organizations relationally vis-à-vis one another and (3) constituted the measure analytically such that a transpose of the original matrix could be used to understand how elements within the discourse system are structured through their articulation within particular organizations (see Mohr, 1994 for an example of such an endeavor).

The plot enables us to see a variety of things. We can assess the degree of institutional specialization of a particular organizational form by measuring the overall size of its niche. For example, the churches are rather densely packed together (at the center of the figure) in contrast to the mission houses, which are scattered more widely across the plot. We can also compare the locations of niches to one another. The fact that dispensaries and mutual relief associations are located far from one another indicates that they operate in rather different regions of institutional life. But before we advance any further it is important to stop and reflect on what is substantively implied by these procedures.

Our argument emphasizes that organizational forms are both embedded within and constitutive of their institutional environment. To say that dispensaries occupy a particular region of institutional space is to suggest that, under stable and well institutionalized conditions, these are areas of social life that are administered to by those organizational forms that have staked out legitimate jurisdictional claims upon the social resources which correspond to those institutional tasks. In this respect, the location of organizational forms in institutional space is substantively similar to the ways in which professional groups compete for the right to claim jurisdiction over a specified region of institutional life (Abbott, 1988). One can think of organizational forms as the containers into which the multiple dimensions of institutional existence are poured. In this context, organizational forms combine types of persons, kinds of problems and styles of treatment in an ongoing and materially recognizable way. Thus it is through the establishment and

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institutionalization of organizational forms that institutional logics come to be anchored in place. At the same time, it is the conventionally recognized meaningfulness of institutional space that provides the terrain upon which organizational resources are coaxed into existence, contested, and secured. In other words, there is a fundamental duality that links niche and form together.

Advocates for new organizational forms must engage with and persuasively challenge the existing combinatorial logic of persons, problems, and practices in order to be able to carve out a distinct resource niche. If the key to procuring resources for a new organizational form lies in being able to make a successful and distinctive claim about the nature of institutional space then two general types of strategies can be identified. One requires the invention of new categories (of people, problems or practices) within the discourse system. For example, the “discovery” of the juvenile delinquent by Progressive Era reformers created a newly recognizable category of person that helped unleash a stream of resources that led to the establishment of a new set of niches in institutional space thus facilitating the founding of child guidance clinics, junior republics, the juvenile court and various other new organizational forms (Lathrop, 1925; Platt, 1969; Holl, 1971; Sutton, 1990; Colomy and Kretzmann, 1995). In this case, a jurisdictional dispute would only occur when advocates of existing organizational forms refused to acknowledge the classificatory distinction of juvenile delinquency or moved to claim the new category as more properly contained within their own region of institutional space.

The second strategy is perhaps more inherently contentious. A new organizational form may also emerge as a result of challenges to existing understandings of how institutional space should be ordered. In practice this implies that new rationales emerge to promote alternative combinatorial logics. For example, in New York State, children were incarcerated in city poorhouses along with their destitute parents until the mid 1870's. In the early years of that decade a group of reformers launched a campaign, culminating in the passage of the 1875 Children's Act, which mandated the removal of children from poorhouses. Proponents argued that children's needs were not being properly served in poorhouses and that they should be transferred to other congregate institutions that would be governed by persons of the same religious faith as the

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children's parents and designed to specifically address the problems of childhood. This move prompted the establishment of a large number of private, religiously oriented organizations, funded at public expense, which were dedicated to raising destitute (non-orphaned) children (Folks, 1902; Ross, 1977; Katz, 1986).

The end result of this challenge to the existing order was a sea change in the character of the organizational forms that operated in this region of the institutional field. But the result was also something more. As Viviana Zelizer (1985) has demonstrated, this period of organizational redesign coincided with the beginning of a radical transformation in the social meaning of childhood itself. Between the 1870's and the 1930's, children went from being conceived of as small adults, valued primarily for their economic contributions to the family, to being seen as the occupants of a distinctive and vulnerable stage of life which made them economically worthless but emotionally “priceless.” The demarcation that separated young paupers from their destitute parents both anticipated and probably contributed to the broader cultural differentiation that occurred between children and adults. The duality of organizational forms and institutional niches implies that these processes occur simultaneously. Thus, contestations over the institutional categorization of children by various classes of organizations — from the factories that hired them as laborers, to the insurance companies that wrote policies for them, to the community welfare organizations that built playgrounds for them — are enactments of a broader cultural change as well as the material embodiments of these shifting cultural logics. In short, competition among organizational forms involves more than a contest to determine which class of organizations displays greater efficiency or tenacity. Much more critical are the coincident struggles that erupt over the very meaning of institutional space itself. These struggles enable resources to be secured, organizations to be established, and social structures to be transformed.

The implications of alternative combinatorial logics can also be seen in the ways in which a social category such as “fallen women” was managed. In the 1888 Directory other organizations, beside the Midnight Mission discussed earlier, claimed to have the jurisdictional authority to treat this class of individuals. One of the clearest markers of how people within a social category are

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regarded is the type of treatment that is prescribed for that class of person. In several cases these women were admitted into long-term, semi-custodial facilities. In other organizations they were trained for employment and assisted in finding respectable jobs. These variations in treatment obviously had an impact on the lives of the women who were subjected to one or another of these organizational technologies but they also, at least potentially, influenced the way that the broader cultural identity of fallen women would be regarded. Organizations also impose meaning through the simple act of combining categories of people together. When two classes of persons are mixed inside the same organization, the identities of the two social categories tend to bleed into one another. While the Midnight Mission tended only to “fallen women,” other organizations in the 1888 Directory described themselves as providing services to “inebriates and fallen women,” “destitute and fallen women,” “friendless and fallen girls,” or “fallen and degraded men and women.” This broad variety of identity combinations and treatment regimes suggests that, in 1888, fallen women occupied a contested region of institutional space.

Implicit in our discussion of jurisdictional conflict is a proprietary conception of the institutional environment. We have assumed that a given organizational form will tend to occupy a definable sub-region of the institutional field and that conflicts will erupt whenever that space is encroached upon by organizations of a different form. This assumption closely parallels what organizational ecologists refer to as the competitive exclusion principle.¹⁸ Ecologists argue that every organizational population occupies a specific environmental niche. In their theory, an environment can be thought of as “an N-dimensional space with each dimension telling the level of some relevant environmental condition. A population's niche is then defined as “the hypervolume formed by the set of points for which the population's growth rate (fitness) is non-negative” (Hannan and Freeman, 1989, p. 96).¹⁹ Competition occurs among organizational populations to the extent that their fundamental niches intersect. Although our project differs from conventional ecological models, we have nonetheless embraced their sense of how to analyze the competitive relationship that inheres between organizational forms. Put differently, like Hannan and Freeman,

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we too are interested in how blending and segregating processes affect the ways in which organizational forms are arrayed within institutional space.

If we return to figure 1, it should now be clear that one of the things that proximity within this plot can signify is that two different organizational forms are making contrasting claims about the nature of a region of institutional space that they co-occupy. But the problem is more complex. Locational similarity can also indicate agreement. A number of these organizations are stacked in the same institutional location because their TSP profiles were identical to one another. In other cases the circles are very near to one another or actually overlapping because they are in substantive agreement about the proper solution to a type of problem, but they focus on a slightly different population of people. For example, the Riverside Day Nursery provides care for “children of working women” (S4, S16), while the Bethlehem Day Nursery tends to the “children of protestant women going out to work” (S4, S11, S16). These two organizations are quite close to one another in figure 1, yet their adjacency does not reflect a core disagreement so much as a variance in market segmentation with one organization including a religious qualification to describe its client population. Ecologists would describe this as a resource partitioning problem (Carroll, 1985).²⁰

On the other hand, the West Side Day Nursery and Industrial School is also located very close by in this space. It too provides care for “children during day while the mothers are at work.” This is an industrial school which indicates that it is a different type of organization all together. Industrial schools were a prevalent organizational form during these years. Originally begun by the Children's Aid Society, these schools provided food, clothing, and training in household crafts and employable skills to poor children, especially “street boys” and “girl vagrants.” They were intended to use “the refinement, education, and Christian enthusiasm of the better classes” to help nurture the children away from the bad influences of their parents (Brace, 1872, p. 135). The fact that both industrial schools and day nurseries were seeking to work with the same class of children indicates that these two organizational forms in fact were engaged in precisely the sort of jurisdictional dispute that we have been describing.²¹

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We are thus left with something of a dilemma. Spatial adjacency in these plots may indicate both agreement and disagreement. The adjacency of organizations of the same form reflects a fundamental consensus over institutional principles. Adjacency of organizations of different forms suggests the existence of jurisdictional competition. To distinguish among these two competing social processes we need to shift the focus of our analysis to the question of how different organizational forms stand in relation to one another within the institutional field. To do this effectively it will be helpful to formalize the analysis of organizational forms' relative location within institutional space. McPherson's (1983) analytic strategies can help facilitate this task.

Niche Measurement in Institutional Space

It is a simple matter at this point to borrow McPherson's strategies for analyzing niche overlaps and to apply these techniques to our own metric of institutional space. Recall that McPherson's solution to the problem of how to measure a niche is to take an average measure (1.5 standard deviations on either side of the mean) of all organizations of a given form for each of n environmental dimensions. In McPherson's work, the relevant dimensions are demographic characteristics of potential members (their age, income, occupation, gender, etc.). For us, the dimensions are unspecified — they are implicit reflections of discursive difference operationalized by the multidimensional scaling analysis. Figure 2 illustrates the application of McPherson's procedure to the 2-dimensional plot we've been discussing. To simplify the illustration we have suppressed the printing of all but four organizational forms — mutual relief associations, mission houses, churches and benevolent societies.

As an example, the niche space of the mutual relief associations (MRA) is calculated in the following manner. There are a total of 32 MRAs in the plot (indicated by the black circles). The mean value of the x coordinate for these 32 organizations is 1.44. The standard deviation is .36. We calculate the lower bound of the x -coordinate for the MRA niche base as $1.44 - 1.5(.35) = .90$. The upper bound is $1.44 + 1.5(.35) = 1.98$. The y coordinate mean was .03 and standard deviation

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was .56, which sets the upper bound of the y dimension to be .87 and the lower bound as -.81. The area inside this box is the size of the niche base. It can be derived by multiplying the length of the box on the x dimension by the length along the y dimension $(1.98-.90) * (.87+.81) = 1.81$.²²

Niche overlaps occur whenever the niches of two forms intersect. The lower left portion of the MRA niche base intersects with the upper right corner of the mission house niche. The size of the overlap can be calculated in the same fashion and compared to the overall size of each niche base to determine the proportion of each niche that lies within the intersection. Notice that the niche base of the churches is entirely contained inside the mission niche, suggesting that the competition between churches and missions might be considerably more significant for the former than it is for the latter.

—TABLES 1 & 2 & 3 ABOUT HERE—

Table 1 contains the results of applying McPherson's niche calculation procedure to the 5 dimensional MDS solutions for each of the four years in our analysis. Table 2 lists the size of the niche overlaps for the forms in the 1888 dataset (the overall niche base for each organizational form is printed on the diagonal). Notice that social work bureaucracies had the largest niche base (62.606) while the largest niche overlap (20.472) occurred between shelters and lodging houses. Following McPherson, we calculate “competition coefficients” in table 3 by dividing niche overlaps by niche bases. This gives us the percentage of each (row) organizational form's niche base that overlaps with each (column) organizational form's niche. This measure is asymmetric — 14% of the (larger) social work bureaucracy niche base overlaps with the (smaller) dispensary niche, while a full third (.339) of the dispensary niche overlaps with the social work bureaucracy niche. These tools can help us model jurisdictional conflicts over institutional space. We turn now to a fuller discussion of what those conflicts looked like in this time and place.

Rationalizing Poverty Relief in New York City

Public organizations were the backbone of the social welfare system during the nineteenth century, but public assistance was often provided in custodial institutions such as the community

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poorhouse (Katz, 1986). Private organizations were more active in developing a variety of what we would now recognize as community social welfare programs. The organizations that provided these services were of two general sorts — membership-based and evangelical. The former (including community churches, fraternal organizations, benevolent societies, mutual relief associations, and the like) provided assistance to individuals who were identifiable as members of a particular group. Generally, these were small, relatively informal organizations that united members of local status communities in various types of agreements to assist one another in times of need.

In contrast, evangelical organizations cut across community and class boundaries. Mostly staffed by middle class volunteers, these organizations (mission houses, Sunday schools, missionary, temperance, and tract societies) sought to spread religious values and to inculcate habits of thrift as they delivered the gospel to the poor. One of the most famous of these was Jerry McAuley's Water Street Mission (established in 1872). As Boyer (1978, p. 135) explains, “McAuley conducted his mission along time-tested lines: lively preaching, lots of singing, spontaneous testimonies by reformed drunkards and tramps, and no-nonsense charity: soup, baths, and beds.” Not all of these organizations provided relief services to the poor, but, especially toward the end of the nineteenth century, many of Manhattan's mission houses and missionary societies had become primary providers of free meals, cast-off clothing, temporary shelter, employment assistance, and job training to the residents of poorer neighborhoods.

Many of the missionary societies eventually developed into large, formal organizations, but it was the New York City Charity Organization Society (COS) that most directly and self-consciously promoted the bureaucratization and rationalization of community social welfare services. The COS movement was founded upon the idea that poverty relief should be designed in accordance with scientific principles of rational administration (Watson, 1922; Katz, 1986). This entailed several things. In particular, it meant that social relief should not be given away too easily. Not unlike many contemporary welfare reformers, Charity Organization advocates were convinced that an over-abundance of charitable giving had corrupted the poor and robbed them of the incentive to support themselves through labor. Their solution was to rationalize social relief by: (1) dividing

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the city into discrete districts, (2) assigning “friendly visitors” to each district who were charged with the task of visiting the poor in their homes, (3) investigating relief applicants to ensure that they were truly and genuinely needy, (4) coordinating relief services so that organizations had clear and precise mandates and, (5) registering relief applicants in a central file system to prevent them from getting aid from multiple sources (Lowell, 1884; Watson, 1922; Brandt, 1942). All of these maneuvers were geared toward paring back relief expenditures through the organization and control of the broader community of charitable organizations.²³

But there was more to scientific charity than the goal of preventing “indiscriminate” giving. There was also excitement that society had advanced to a stage where it was possible to transform the pauper class in a way that had never been attempted. The ultimate goal of the New York COS was to create new types of organizational technologies that were expected to be vastly more effective than traditional relief practices. These ambitions were clearly expressed in this excerpt from their 1888 policy statement:

The New Charity differs from the old in its METHODS. The Old Charity finds a man hungry and cold, and it feeds him and gives him an order for a ton of coal. But the cold and the hunger are symptoms. The New Charity seeks for the causes. It finds that the causes lie far within. The causes are moral. The poor who seek relief are often bankrupt, not alone in pocket, but in hope, in courage, in resolution, in self-control. And it is these which the New Charity sets itself to supply. The task is gigantic. It takes but a moment to fill the hand with money, to fill the mouth with bread. But to re-create the soul, to build up again the ruined temple, is a work demanding patience, wisdom, courage, love (Rowell, 1888, p. 443).

This proclamation captures the naive but ambitious optimism of the COS movement. The task they had set for themselves was to “re-create” the souls of the impoverished and the downtrodden masses — to re-make them in their own likeness. Unlike the evangelical organizations that had preceded them, however, it was not religion that the COS reformers counted upon to effect this transformation but rather the efficacy of enlightened, scientific relief.

The friendly visitors were a key to this process. Their insights, scientific scrutiny, and availability as role models were counted upon by the COS to achieve the characterological transformation of the poor. It did not take very long, however, to discover that, for various reasons, friendly visitors were not all together successful at re-creating souls.²⁴ But that which individual

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efforts couldn't accomplish, rational organization surely could. The knowledge about the poor and their habits that was rapidly accumulating as a result of the scientific investigations could be applied to the creation of new organizations, which could operate on a scale that would include whole districts if not whole cities, rather than just individual families.

Beginning in the mid-1880's, leaders of the New York COS began to turn their attention to the creation of a series of new kinds of organizations. Some were patterned after organizational forms that had been tested in Europe or in other American cities and described in the professional literature, others were “scientifically-enhanced” versions of existing organizations. Some were opened as subsidiaries of the COS, while others were established in conjunction with leading private relief agencies in the city (such as the New York Association for Improving the Condition of the Poor). The goals of these organizations varied. The Penny Provident Fund, among other organizations was intended to mold the habits of the working classes, in this case by establishing hundreds of “savings stations” across the city where depositors could learn the virtues of thrift by trading small sums of money (as little as 1¢) for “brightly colored” stamps which could later be redeemed. Others (such as the COS Woodyard or the Workrooms for Unskilled Women) were intended to modify the character of the unemployed by teaching them the inherent satisfactions of physical labor.

These organizations were clearly in the COS mold — they were bureaucratically structured, governed by boards, staffed by COS-associated personnel, and designed in accordance with scientific theories about the causes of and remedies for particular aspects of poverty. They made use of insights gleaned from the COS investigations and sought to supplement the perceived failings of existing organizations. They were based upon the principles of scientific charity; they discouraged simple handouts and sought to transform the character of the relief applicants through rational, scientific practices. In short, they represented a whole new class of social welfare organizations — early precursors to the rationalized and bureaucratic social work agency of today. They were also spread widely across the institutional space. Because the COS reformers sought to transform the entire field of poverty relief, their organizational experiments targeted a broad array of

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people, problems and relief technologies. As a consequence, nearly every organization that they sponsored began from the assumption that existing organizational practices and conceptions of poverty were flawed. Thus, COS reformers instigated jurisdictional conflicts at every turn.

But these battles were not just between the old and the new. Other groups with very different agendas were also seeking to transform the field of community social welfare during these years. The COS advocates' most important competitors were settlement house workers. Settlement houses were first established in England by a fervent group of Christian socialists who thought they had devised a plan for transforming the class structure of industrial society by going and living among the working classes. By sharing the benefits of culture and education with the poor, they hoped to empower them to take active control over their neighborhoods and establish the basis for a truly egalitarian reform movement. In 1884 they opened Toynbee Hall in the heart of the London slums, and settled in to live amongst the workers in an attempt to “bridge the gulf that industrialism had created between rich and poor, to reduce the mutual suspicion and ignorance of one class for the other, and to do something more than give charity...” (Davis, 1984, p. 6). Toynbee Hall was intended to be a place where college students and recent graduates would come to share their knowledge and, at the same time, to learn from the working class residents of the neighborhood.

Like many men of his generation, Stanton Coit left the United States in order to pursue graduate work in Europe (he earned a doctorate from the University of Berlin). In 1886 he traveled to London and took up residence at Toynbee Hall. When he returned to the states he immediately set to work on the task of adapting the settlement plan to the needs of American cities. He moved to New York and began “searching out that particular part of the East Side where family life most obviously lacked the moral initiative a group of young resident educators and reformers might bring” (Woods and Kennedy, 1922, p. 42). Shortly thereafter (in 1887) he opened the first American settlement house on Forsyth Street. His hope was that this organization would provide a forum in which the resources of the local community could be encouraged and nurtured. The key to his plan was the creation of a series of “neighborhood guilds ... each would contain about one hundred families and would depend largely on the natural leadership in the neighborhood to

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promote 'all the reforms, domestic, provident or recreative which the social ideal demands'" (Davis, 1984, p. 9). Coit had ambitious plans for these guilds, hoping they would prosper and multiply "and that within ten years they would provide the foundation for a civic renaissance in America" (Davis, 1984, p. 9).

Other settlements followed soon after. In 1887, a group of women alumnae of Smith College formed the College Settlements Association. They organized chapters on the campuses of Smith, Wellesley, Vassar, Bryn Mawr and Radcliffe. In 1889 they opened their first settlement house, also on the lower east side of Manhattan, naming it the "College Settlement." At about the same time, Jane Addams, who had visited Toynbee Hall in 1888, was making arrangements in Chicago to establish "Hull House," which would go on to become the most famous settlement in America. "East Side House," the fourth American settlement, was founded in New York in 1891. By 1897, seventy-four settlements had been established nationwide, and the number continued to grow steadily — over a hundred in 1900, 200 in 1905, more than 400 by 1910 (Woods and Kennedy, 1922).

While Coit's vision for a "civic renaissance" never came to pass, most settlement house activists did share in his belief that the revitalization of America's cities would be brought about through an empowering of local communities. Every settlement carried on the tradition of sponsoring local clubs and guilds as a way to reach out to the neighborhood and draw the local population into the settlement house's sphere of influence. Many also followed in the tradition of Toynbee Hall by offering university extension classes to neighborhood residents, and almost every settlement house had a program of lectures and community meeting forums. As the settlements proliferated, they began to innovate by emphasizing the virtues of culture, sponsoring art shows, poetry readings, classical theater presentations and art appreciation classes, and providing support for working mothers by offering day care or kindergarten classes for children as well as classes in "homemaking, cooking, sewing, and shopping" (Davis, 1984, p. 46). Others, like New York's Henry Street Settlement (founded in 1893), focused on public health care and visiting nurse programs.

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In these efforts, settlement house workers sought to chart a new and different course for reform. They quite self consciously distinguished themselves from the COS workers whom they viewed as condescending and repressive (Carson, 1990). In contrast to scientific charity which understood poverty to be the result of the moral laxity and depravity of the poor, settlement workers focused on social and economic conditions. Whereas friendly visitors descended into the slums to teach the poor how to improve themselves, settlement workers believed that there was a special nobility to the working classes that made life in the settlements as much a learning experience as it was an opportunity to teach. Once again, distinctions were made between 'old' and 'new' forms of charity. In Jacob Riis's words, “(w)e have substituted for the old charity coal chute, that bred resentment ... the passenger bridge which we call settlements, upon which men go over not down to their duty” (cited in Davis, 1984, p. 20). The disdain which settlement workers felt for the COS movement did not go unreciprocated. COS leaders were equally dismissive of the settlement houses which they characterized as “sentimental and unscientific and too vague to be useful” (Davis, 1984, p. 20). Davis quotes one Charity Organization official who “compared the settlement worker to a man who found a drunkard lying in the gutter and said to him, 'I can't help you my friend, but I will sit down in the gutter beside you’” (1984, p. 20).²⁵

Though they embraced different visions and employed different methods, advocates for these two organizational forms were nonetheless aiming at the same target. Both groups sought to insert themselves into the center of the organizational field and to transform the character of the work that was being done there. In both cases, these ambitions were inscribed in the very design of their organizations. Their ideas about the proper nature of social life were embodied in the types of relief practices and discursive frameworks that provided the foundation for the work that they chose to engage in. Once again, we can best understand the relation between these two groups as a dispute over who had the right to know, to name, and to act upon a specific (and, in this case, a rather expansive) region of social life. This means that the advocates for these classes of organizations were seeking to engage the same region of institutional life and to do so in somewhat different ways.

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—Table 4 about here—

Mapping Jurisdictional Conflicts

Ideally, our method for measuring how organizational forms are arrayed in institutional space ought to help us better understand the ways in which these kinds of organizational conflicts came to be played out in New York City's social welfare sector during this period. To help interpret our findings we dichotomize the measures of niche competition reported in table 3 by assigning a value of 1 to all competition coefficients that are greater than the overall mean (.044) (see table 4). We then represent this dichotomous matrix as a digraph in Figure 3a. Arrows are indicators of niche overlap. Two headed arrows indicate that the competitive relationship is symmetric. Single headed arrows indicate an asymmetric relation. The degree of symmetry in the relationship reflects both the degree of overlap and the relative size of the two niche bases. With these analytic tools at our disposal, we turn now to a more detailed examination of the history of organizational forms in the New York City social welfare sector between 1888 and 1917.

— Figure 3A about here—

Figure 3a shows that some of these organizational forms occupied relatively uncontested niches in the sense that there were very few other organizational forms seeking to operate within the same region of institutional space: day nurseries, benevolent societies, lodging houses, and mutual relief associations all occupy well buffered niches.²⁶ Other organizational forms appear to be enmeshed in a wide variety of niche overlaps. Notice for example where the COS affiliated social work bureaucracies are located in the graph (with 7 substantive niche overlaps). To the extent that dense niche overlaps reflect high levels of jurisdictional conflict, then the area that is jointly occupied by mission houses, churches, missionary societies, and social work bureaucracies would appear to be the mostly hotly contested region of institutional space. This is also the core of the organizational field. It is here where the most fundamental principles of poverty relief practices are debated and where the greatest professional and ideological controversies were likely to be

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negotiated. Recall that in the years immediately preceding the founding of the COS it was the missionary societies and the mission houses that dominated this region of community social welfare concerns. Advocates for both of these classes of organizations had ambitious and impassioned organizational visions. In addition to saving souls, they sought to change the habits and the moral character of the poor and they pursued their goals through a wide-ranging set of programs. These were exactly the types of organizations that the COS reformers attacked as being unscientific, unsystematic, and ultimately destructive in their casual attempts to reform the poor. To find a high level of niche overlap between mission houses, missionary societies and the COS bureaucracies is thus not surprising.

Why were churches located in this same core region? Recall that we have only included “institutional churches” in these analyses (see note 7). Spurred on by the growth of Manhattan's mass transit systems, the middle classes had begun withdrawing to the suburbs, leaving many inner-city churches surrounded by poor, largely immigrant neighborhoods. The institutional church movement was one response. “The best known of the institutional churches was Saint George's Episcopal Church in New York, a once flourishing parish on the Lower East Side that by the 1880's found itself with a dwindling membership, a \$35,000 debt, and immigrants on all sides” (Boyer, 1978, p. 138). In 1882 the church hired William Rainsford, an Irish minister who had made a name for himself through his vigorous urban ministries and “tent crusades.” Rainsford was a fierce critic of the mission houses which he saw as “a feeble rearguard action by a dispirited and retreating Protestantism.” As Boyer relates, “Rainsford's conclusion was harsh: 'The small mission church, struggling to live, equipped with second-rate machinery, human and material, can never succeed and is a waste of energy’” (p. 137). Rainsford sought to develop an alternative to the mission houses by transforming Saint George's Church into a more secularly oriented, wide-ranging, multi-purposed, social relief agency. He believed that the church had to respond to “the social needs and aspirations of the masses of the people” and he sought to do this by “introducing a boy's club, recreational facilities, and an industrial training program and spicing up the church's religious ministry with a Sunday school, congregational singing, and his own vigorous

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preaching...” (p. 138). Boyer estimates that about 15% of the churches in New York City had embraced this strategy by the turn of the century. He also shows that there were many within the church community who were profoundly disturbed by these developments and that the movement was relatively short lived. In other words, in 1888, the institutional church was an organizational form that was also contending for a central place within New York City’s social welfare sector and that fact is also represented in figure 3a.

The other most highly contested niche space (with 4 substantive niche overlaps) was occupied by medical dispensaries. Here again, a reading of the historical literature corroborates this structural finding. As Michael Katz explains, the “dispensary 'was an autonomous, free-standing institution' created to provide an alternative to the hospital for the 'urban poor.' Usually, dispensaries had their own building and at least one full-time house physician. Most also hired young physicians to visit patients too sick to leave home. Almost all the dispensaries operated on very low budgets and depended on 'private contributions and the often voluntary services of local physicians’” (1986, p. 138). While it might well seem as though this organizational form would occupy a relatively well buffered niche, in fact, the missionary societies were encroaching on this space through their own attempts to expand their ministries by providing health care to the poor. At the same time, the COS reformers were also attacking the dispensaries (and seeking to replace those functions with organizations of their own design) because they perceived them to be yet another “form of indiscriminate outdoor relief that bred dependence” (Katz, 1986, p. 139).

In short, our graph of niche overlaps corresponds rather well with what historians have told us about the organizational field. The most highly contested niche spaces were occupied by those organizational forms whose advocates were most actively engaged in the debate over how to transform the field of community social welfare. Of course, it was precisely these organizations that were also configured as institutional generalists, spreading themselves widely across the organizational space. As we have seen in the case of the COS, the ambitious and transformative vision of the scientific charity movement was directly correlated with the expansiveness of the institutional mandate that the COS reformers embraced. Moreover, mission houses and missionary

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societies, both of which were as institutionally hegemonic in their own fashion as were the COS bureaucracies, occupy the next most contested and as well as the next largest, niche bases. But the contest was complex and multi-layered. Churches, for example, are institutional specialists. They occupy one of the smallest niches in the field and yet their space is also in great demand. On the other end, lodging houses, shelters and industrial schools all have larger (more generalized) institutional niches than the dispensaries, yet their spaces are also considerably less contested. This suggests that we need to look at both the degree of specialization as well as the degree of contestation if we are to fully understand the structure of jurisdictional conflict and institutional competition.

Form Dominance, Niche Competition and Institutional Imprinting

The thirtyyear period after 1888 was a critical phase in the history of the American social welfare sector (Katz, 1986; Hamilton and Sutton, 1989; Skocpol, 1992). During these years, the institutional logic of the field went through a measurable de-structuration, followed by a subsequent re-structuration .²⁷ This means that a long period of organizational stability in which a single organizational form (the poorhouse) dominated the field of poverty relief was rapidly transformed. A variety of different professional and organizational experiments were launched and a host of competing visions were advanced. By the end of the Progressive Era (around the time of the first World War) the sector had once again settled down into a period of relative stability and again a dominant organizational form, the scientific social welfare agency, had emerged to anchor and define the institutional logic of the field. It was during this time of change that the cold-spirited scientism of the COS movement was challenged by the far more progressive orientation of settlement house workers. It was also during these years that the last vestiges of the traditional system of social welfare — the membership based and evangelical organizational forms — were pushed out of the center of the organizational field, toward the more marginal institutional roles that they continue to perform today.

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To capture these events and their manifestations in the ongoing contestation over niche boundaries, we extend our analyses up through the end of the Progressive Era by sampling the directories at ten year intervals (1897, 1907 and 1917). Figures 3b, 3c and 3d summarize the results of these analyses.

—Figure 3b about here—

The most obvious modification in the 1897 diagram is the emergence of the settlement house niche. By 1897 settlement houses were an important part of the landscape of New York City's social welfare sector. In figure 3b, they are also the occupants of the niche location with the highest number of significant niche overlaps. When the settlements arrive on the scene, they drive a wedge between the COS bureaucracies and the evangelical sector of the field (the mission houses and missionary societies). In a sense, the settlement houses take up residence in that region of institutional space where the modern concerns of the emergent social work profession intersect with the more traditional and community oriented relief endeavors that had characterized the visiting missionaries and mission houses. These three organizational forms, along with the institutional churches, are co-located in a densely disputed sub-sector of the field. The most highly contested region (as measured by density of niche overlaps) is the space that is co-occupied by social work bureaucracies, churches, settlements and shelters. Here the contest between churches and the COS agencies continues unabated. The intrusion of the settlements into this space reflects the efforts of settlement workers to displace what they regarded as the "old methods" of scientific charity. The presence of shelters in this same region indicates the changing character of these organizations. Shelters had become increasingly important organizational forms throughout the 1880's when they were initially established to provide temporary residences and social relief to diverse categories of distressed women. In the 1890's new shelters began to appear on the scene, such as the Industrial Christian Alliance, founded in 1891, which served unemployed men and provided them with industrial and religious training, social relief, and temporary shelter. This development brought shelters into direct competition with the other general service agencies.

—Figure 3C about here—

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The 1907 graph indicates that the field was still unstable. A notable development here is the emergence of youth service organizations. As Macleod (1983) emphasizes, the 1890's and 1900's witnessed a huge flourishing of youth organizations, from mass boy clubs (directed toward working class youth) to the more elite organizations such as the Boy Scouts (which envisioned their task to be the teaching of principles of chivalry to middle class boys). The expansive growth in the niche base of this organizational form during this period captures the explosion of innovation that characterized the proliferation of these new organizations. Even more interesting is the beginning of a clear differentiation between two relatively separate sub-domains of the institutional field.

Toward the upper right segment of the graph, a contested region of space is shared by social work bureaucracies, dispensaries, diet kitchens and industrial schools. At the lower left region of the graph, a different sub-domain is emergent in the space shared by settlements, mission houses, institutional churches, and youth service organizations. The fact that settlements and social work bureaucracies are no longer in direct competition indicates that a division of labor has begun to take hold. Settlement workers had begun to forsake their broader ambitions of transforming society in order to focus more narrowly on the practical needs of the local community. In the process they surrendered the more systematic work of organizing charities and coordinating the flow of relief among specialized sub-sectors to the more bureaucratically inclined COS affiliated social workers. More or less simultaneously, the social work bureaucrats had come to acknowledge the special skills of the settlement workers in managing the quality of community life and ceded control of that activity to their professional colleagues in the settlements. This bifurcation of the field appears to have come to near full fruition by 1917 with the settlements anchoring the left side of institutional field, while the social work bureaucracies dominate the right.

—Figure 3D about here—

The splitting of the institutional space along these lines suggests that a kind of truce had been reached. The overall structure of institutional competition has settled into an orderly pattern with more localized jurisdictional contestations replacing the free-for-all conflicts that had characterized the earlier years. The more religiously-oriented organizations have withdrawn to the

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upper left quadrant, while the youth service agencies and lodging houses (largely catering to the needs of young working men and women) have settled into the lower left region. The upper right corner contains the more highly professionalized agencies, especially those that have public health care issues as part of their mandate. The central part of the field mostly holds those anachronistic (and soon to be extinct) organizational forms, industrial schools and mutual relief associations, both of which seem to be unable to find their place in this newly rationalized and systematically differentiated institutional regime.

By 1917, New York City's community social welfare sector had become (essentially) modern. Evangelical and membership-based organizational forms continued to operate, but they no longer occupied the core region (or defined the logic) of the field. Indeed, the rationalized division of labor that had been called for by the COS workers some thirty years earlier had taken hold to such an extent that there was no longer a clearly identifiable center to the institutional space so much as a series of adjacent and complementary sub-domains. While this result might appear to be explained by a meta-narrative about social progress, according to which the increasing specialization of society led to a necessary and functionally appropriate differentiation of the social welfare sector (Wilensky and Lebeaux, 1958), in fact, our story is quite different. We have argued that there was no inevitability to these developments. Rather there were a series of jurisdictional conflicts in which the advocates of various organizational forms, each of whom possessed a distinctive vision about the appropriate interpretation of the nature of social welfare, competed with one another in order to win the right to be able to know, name, and act upon the arena over which they claimed sovereignty. The rationalization of the field, then, should not be seen as an inevitable result of modernizing pressures, but as the triumph and subsequent institutionalization of one particular vision in lieu of others.

The perspective that prevailed was one that had been initiated by and embodied within the various organizations cast in the mold of the COS. This scientific charity vision was grounded in a belief that the problems of community social welfare were largely the result of individual pathologies and personal moral failings. The COS reformers believed that the poor had come to

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their fate because of their profligate and irresponsible ways. While it is true that the spirit of progressivism tempered the harsh and punitive demands of the early COS advocates, it is nonetheless the case that the legacy of that orientation continued to live on in the individualized and fragmented lens through which bureaucratic social workers interpreted the world.²⁸ Thus, Mary Richmond (1917), the intellectual leader for this branch of social work theory, portrays the relationship between social workers and their clients as paralleling the relation of a doctor to her patient; the client is to be investigated, prodded, and poked until a proper diagnosis can be rendered and a cure prescribed.

COS type organizations directly embodied this vision in their conceptualizations of individuals, social problems, and social treatments. The social investigation, including the adoption of a clinical stance and the careful collection of objective data regarding individuals' lives and habits, was a fundamental part of the daily practice of social workers inside these organizations. Clients were classified according to their supposed pathologies and routed to specialized organizations, charged with the task of utilizing a precise set of technologies. The institutionalization of this vision of community social welfare promoted the proliferation of specialized organizations (e.g., child guidance clinics, habit clinics, posture clinics, etc.) and directly contributed to the emergence of the problem of service coordination and integration, an enduring dilemma of the American social welfare sector.

In contrast, settlement workers were far more likely to interpret poverty-related social problems as stemming from social and environmental conditions. This perspective permeated the thinking of the early founders of settlement houses, and was reinforced on a daily basis by the way in which these organizational forms operated. Because they themselves lived in the neighborhood, settlement residents were subjected to some of the same deprivations as their clients and were thus more inclined to see the world from the point of view of those who they sought to assist. Because their practices emphasized community events, they were far less likely to view the poor as atomized, pathological individuals.²⁹ And because they sought to promote collective orientations, they were far more likely to prescribe and facilitate political mobilization as a cure. Hence, many settlement

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workers became active supporters of the labor movement and fought to increase collective bargaining rights. Others pushed to implement policy reforms at the local, state and eventually, federal level. Davis (1984) recounts dozens of ways in which settlement workers became involved in Progressive Era political struggles—from child labor legislation to tenement house reform—culminating in the campaign to elect Theodore Roosevelt on the Progressive Party ticket in 1912.³⁰

The victory of the COS over the settlements was not immediately apparent. Settlement houses continued to exist, but as time passed they became increasingly marginal to the organizational field. Carson suggests, by the 1920's “the settlement workers had become amateurs in some of the very fields they had opened up: public health, labor organization, immigration policy” (1990, p. 194). This was a difficult period and the leaders of the settlement movement entered into a protracted “local” struggle over the direction of their organizations (Carson, 1990).³¹ Meanwhile, the core of the social work profession shifted away from a more radicalizing stance toward the increasingly scientific orientation of people like Mary Richmond (Lubove, 1965).³² Thus when Franklin D. Roosevelt assembled around him a team of professional social workers in 1932 to help construct the foundations of a national social welfare system, it was mostly the intellectual and organizational descendants of the COS who got the call.³³ In short, the social structure of the modern American social welfare system was imprinted in an enduring way by the kinds of organizations that dominated the field at its moment of origin.³⁴

Conclusion

In this chapter we have presented a method for analyzing how organizations and organizational forms are arrayed across institutional space. In our approach we focused on a specific set of agencies occupying a common organizational field. We looked to see how the organizations were connected relationally and concretely, one to the other, on the basis of claims that proponents made about what they sought to accomplish. We focused on three discourse

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vectors, two that defined sets of cultural identities and a third that specified repertoires of organizational practice and then coded each organization's claims in such a way that their natural narrative complexity was preserved. We analyzed these data in a manner that emphasized their embeddedness within a broader semiotic discourse system, thus interpreting the meaning of any particular organizational identity as being defined by its location vis-à-vis the entirety of organizational identities within the same institutional space. We applied these techniques to our study of social welfare organizations operating in New York City. We suggested that niche competition be understood as jurisdictional conflicts through which the proponents of alternative organizational forms compete for the right to know, to name and to act within a given region of institutional life. By this logic organizations do not simply compete for (pre-existing) resource niches, rather they produce those niches in the very act of competing for them. Borrowing McPherson's techniques we then traced these shifting niche boundaries across time so as to track the struggle that occurred between settlement houses and scientific charity organizations during the Progressive Era. We end by arguing that the modern American welfare state was imprinted at its moment of origin by the results of this niche competition between alternative organizational forms.

Historians have tended to overlook these issues, including the conflict between the COS and the settlement houses, because they have generally not appreciated the significance of the organizational form as a unit of historical analysis. Other theoretical frameworks have thus taken precedence. In his classic history of the professionalization of social work, Roy Lubove (1965) hardly seems to notice the difference between the settlement houses and COS agencies, instead he focuses on the conflict between professionals and non-professionals. Paul Boyer treats both settlements and COS agencies as exemplars of middle class moral reform efforts, describing the conflicts between the two as a mere "family spat" (1978, p. 156).³⁵ In contrast, we argue that it was the differences between these organizational forms and the ultimate triumph of the COS organizations that fundamentally shaped the character of the modern American welfare state.

This is a conclusion that resonates with the ecologists' ongoing concern to show how it is that organizational forms affect social structures. The commitment that ecologists have evinced to

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this notion has always impressed us and their efforts to illuminate these effects strike us as constituting their most powerful substantive contribution to the field. But as we suggested earlier, our own concern has been to bring the duality of this phenomena into full focus. For even as we have sought to demonstrate the power that organizational forms have in shaping the character of a field, we have done so by attending to the ways in which these forms are themselves defined by their embeddedness within institutional space. We have suggested that organizational agents must compete for the right to lay jurisdictional claim upon a region of social life and that this is a competition over who shall be recognized as competent to know, to name, and to act within designated institutional spheres. But to gain access empirically to this process we have had to understand how these kinds of institutional claims are located within a broader discursive terrain. The analytic meaning of an organizational form, in this sense of the term, depends entirely upon where it lies within a broader field of shared and contested meanings. It is because forms are the embodiments of divergent visions of how institutional life can and should be organized that the differences between organizational forms matter.

It is the institutionalists who first taught us to think about these kinds of broader cultural questions when we seek to understand organizational environments. At the same time that Hannan and Freeman were puzzling through the problem of how organizational forms were arrayed within institutional space, institutionalists were engaged with questions such as how the meaning of educational graduates were defined by the organizations that graduated them (Meyer, 1977), how the sense of selfhood (Meyer, 1985) or childhood (Boli and Meyer, 1987) were defined by organizationally enacted institutional rules. While these kinds of insights were stunning and foundational they were limited in two ways. First they highlighted broad institutional rules rather than specific organizational forms. One consequence was that conflict and competition among alternative institutional visions was not foregrounded. Second, although these studies made use of quantitative tools, they did not employ relational techniques that were geared toward the identification of semiotic meaning systems. Thus the specific content of cultural meanings were not subjected to formal investigation so much as the broad contours of organizational conformities.

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After the first decade of institutional scholarship this began to change. Particular organizational forms began to be highlighted. Research on art museums (DiMaggio, 1991), community colleges (Brint and Karabel, 1991), railroads (Dobbin, 1994), on-line information services (Ventresca, 1997), savings and loan associations (Haveman and Rao, this volume), and accounting firms (Greenwood, Hinings, and Cooper, this volume) demonstrated that the success of particular organizational forms leads to the differential allocation of social resources and the institutionalization of broad ways of thinking, knowing, and acting. At about the same time, many institutionalists also changed the way that they used data. Borrowing tools from formalist studies of culture, they increasingly began to employ relationally based formal methodologies as a way to more aggressively bring the interpretation of meanings into the core of their analyses (Ventresca and Mohr, 2002). What we have tried to do in this chapter is to link these trends in institutional analysis together with parallel trends in ecological research. We are not the first to pursue such a goal, indeed, as we suggested earlier many ecologists and institutionalists have been moving in this direction. But this work tends to be constrained by the intellectual imprinting of its origin.³⁶ Our argument is that it is not sufficient to borrow ideas from one perspective in order to graft them onto one's own alternative intellectual formulations. Something more fundamental is called for, some third way that takes duality seriously, not as a metaphor but rather, as Breiger (1974) originally suggested, as a concept that implies specific procedural commitments and an appreciation of the mutually constituted character of dual orders of social phenomena (Friedland and Mohr, 2004).

What we have presented here is not, by any means, a complete solution to this problem. Even with respect to our own project it seems clear that what we have achieved is but one rough slice into the data. Other cut points could be made into the three discourse vectors analyzed here. Other interpretations of the textual material could be offered. Moreover our style at this stage has focused more on exploratory data analysis than on hypothesis testing, we have been more inductive than deductive. We welcome alternative analyses of these data and explorations of these concepts. As the ecologists have demonstrated so effectively, social scientific progress is only enhanced by the systematic and collective consideration of well specified research problems.

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Our focus here has been on one organizational field, poverty relief and social welfare services in New York City but we believe that these procedures are fully generalizable. What we have sought to accomplish is to bring a well honed interpretative sensibility to a body of organizational discourse that contains within it markers for the kinds of (dually ordered) discursive distinctions that are recognized by organizational practitioners within a given field. We think any organizational field would be analyzable by a similar kind of investigative endeavor. The key, once again, is to bring meaning back in, and to do so not as a supplementary feature of the analysis, not as a control variable or an empirical discovery defined by some other logic of inquiry that is to then be brought back for testing against an autonomously defined measure of organizational events. Rather, our contention is that measures of meaning must be fully integrated into the very core of the research design. Forms and niches are dually ordered and mutually constituted and research regarding one or the other must respect the integrity of that duality.

A primary goal of this chapter is to contribute to the discussion of how institutional and ecological research might be usefully combined. The work presented here was originally inspired by Hannan and Freeman's (1986) evocative imagery of how blending and segregating processes operate in institutional space. We see our paper as an attempt to work out the implications of that imagery, an endeavor that by our estimation requires a more genuine commitment to the duality perspective which Hannan and Freeman gesture towards in that paper but which they do not ultimately pursue. Such a pursuit will allow us to more fully understand how it is that, as Stinchcombe argued, there is an essential duality between the kinds of organizations that exist and the institutional space that they occupy. Social structures produce organizational forms but, at the same time, organizational forms create social structures.

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End Notes:

¹ Originally published by Hannan and Freeman in the inaugural issue of *Sociological Forum*, the journal of the Eastern Sociological Association. The paper was later revised and published as chapter 3 of their co-authored book, *Organizational Ecology* (1989).

² Hannan and Freeman identify their (1984) essay as the turning point on this matter.

³ Breiger and Mohr (2004) develop DiMaggio's insights about the utility of using blockmodels to analyze organizational field and extends the analogy to other forms of duality analysis.

⁴ Note that the relational space itself differs. DiMaggio's organizational space is topological while McPherson's space is dimensional. See Mohr (forthcoming-a) for a sustained discussion of this difference and its implications.

⁵ The intellectual genealogy here is complex. Harrison White was the locus of the team (which also included Phipps Arabie and Scott Boorman) at Harvard who developed blockmodel techniques (DiMaggio was also a graduate student at Harvard during this time). White's earlier work (White, 1963; Lorraine and White, 1971) was clearly an inspiration for Breiger. And the elegant sense of structural logic in Breiger's essay was part of the spirit that the blockmodel team sought to advance. See Breiger (1974) and Breiger and Pattison (1986) for a fuller discussion of the connections.

⁶ The basic solution proposed in this paper comes to be enacted in much of the ecological work that follows through the addition of ever more nuanced institutional factors as control variables in event history models used to assess key events in the dynamics of population demographics.

⁷ As part of their attempt to rationalize the field, the COS published these Directories (beginning in 1883) and distributed them to social welfare practitioners and potential donors throughout the city. With the exception of a few "deviant" organizations that were purposely excluded from the listings, the editors' goal was to provide as comprehensive a listing as possible of all the public and private organizations that provided any type of social welfare services in the city. The first edition (covering just Manhattan) included nearly 500 organizations. By 1907 the Directory had expanded to include all five Boroughs and provided information on over 3000 organizations (including churches). In this chapter we only make use of the subset of organizations that emphasized community social welfare services. This means that we have excluded all residential, custodial, and other sorts of in-patient

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facilities including hospitals, orphanages, old-age homes, poorhouses, and all other types of asylums. We also excluded organizations that were primarily policy (rather than direct service) oriented, organizations that catered to war relief or other non-local causes, and organizations that primarily provided vacation services (outside of the city). We excluded churches from these analyses unless they provided at least 4 types of community social services. Since religious services, Sunday schools, religious clubs and community activities such as musical groups were all coded as community services, this criteria served to exclude churches from the analysis unless the organization was actively involved in the business of providing community social welfare services. As we explain below, churches of this sort, known as “institutional churches,” played a very special role in the field of community social welfare during these years. To preserve the comparability across the four time intervals, we include only those organizations that were located in the Borough of Manhattan.

⁸ Listings also included information such as the date of founding, the size of the organization, and whether it was affiliated with the state or a religious denomination.

⁹ A SAS program was used to translate the text strings into binary variables. Mohr (1994) provides a description of these procedures.

¹⁰ In this respect we are of course quite close to Hannan and Freeman’s suggestion that forms be defined in terms of “four properties — stated goals, forms of authority, core technology, and marketing strategy” (Hannan and Freeman, 1986, p. 57). We have resisted using “forms of authority” as a means of differentiating forms because one of the interesting questions for us has to do with how public vs. private organizations compete over institutional space.

¹¹ Note that there is a third sub-organization, the “House of the Holy Family,” which is also listed as being maintained by the “Association for Befriending Children and Young Girls.” We treat this as a separate (affiliated) organization because it has a proper name, a distinct mission statement and a separately listed administrative structure.

¹² Across the four years of the analysis, a total of 1,091 T, S, P, TS, TP, SP and TSP combinations were found to actually occur in one or another organizational form. This represents about 17% of the number of combinations that might possibly have occurred in the data.

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¹³ Hence, if two organizations (i,j) share 6 TSP combinations, and organization i makes use of a total of 12 TSP combinations in its description while organization j only uses a total of 6 TSP combinations, than organization i has a similarity of .5 with organization j, while organization j has a similarity of 1.0 with organization i.

¹⁴ We used the MDS procedure in version 6.11 of SAS running in Unix. We employed Kruskal's Stress Formula 1 as the badness-of-fit criteria. After running a series of solutions from 2 to 10 dimensions, we settled on a 5 dimensional solution as the place where the bend in the "elbow" was at its greatest (Kruskal and Wish, 1978). This yielded stress levels in the .15 range for all 4 models (1888, 1897, 1907 and 1917). Though these stress levels are moderately high, the solutions appear to be quite robust and acceptable given the large size (N= 283, 471, 569 and 584) and relative sparseness of the input matrices. In order to facilitate a manageable visible display of these procedures, we also ran a 2-dimensional model on the 1888 dataset. Here the stress values are quite high (.31) suggesting that the model is not a very reliable representation of the similarities in the input matrix. However, because we use the output for illustrative purposes only, we have included it as Figure 1. It should be noted, however, that in these data a higher dimensional solution is preferable.

¹⁵ More precisely, two organization's adjacency in the plot indicates that the vector of similarities of their TSP profiles to all other organizations are similar to one another. Note that there is no inherent or substantive interpretation attached to the coordinate axes. The plot should be read as a relational system in which the relative proximity of one organization to the others is the focus of interest.

¹⁶ Our coding procedure involved the following steps. First, we used computer selection procedures that took into account any self-designations (in the organizational name) as well as category designations within the Charity Directories themselves and a profile of characteristic service patterns such as those just described to designate social work bureaucracies. Included in this algorithm was a hierarchical assignment structure so that, for example, a social settlement that provided day nursery services to the community would be classified as a settlement (not as a day nursery). Any organizations that could not be unambiguously coded by these procedures were assigned to a value of "other." The Association for Befriending Children and Young Girls (described earlier) is a good example of an organization that does not fit neatly into any category and has been assigned to the category "other." After running

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the computer program, both of us, independently, inspected the resulting categorization and discussed any disagreements. We then refined our coding algorithm and repeated the process. We cycled through this set of procedures a half dozen times. In the end, we hand-coded all designations that we agreed were being misclassified and assigned all organizations that we could not unequivocally agree upon to the category of “other.”

¹⁷ Across the four time periods this includes: the various District offices, the Penny Provident Fund, the COS Woodyard, the Wayfarer's Lodge, Work Rooms for Unskilled Women, Park Avenue Laundry, the Joint Application Bureau, the COS Investigation Bureau, the COS Registration Bureau, the COS Special Employment Bureau, the COS Department For the Improvement of Social Conditions, the COS Committee on the Prevention of Tuberculosis, the New York School of Philanthropy, the COS Reception Bureau, the COS Bureau of Advice and Information, the Social Service Exchange, and the Red Cross Emergency Relief Committee of the COS. This form also included the branch offices of three other prominent organizations that embraced the principles of scientific charity (the New York Association for Improving the Condition of the Poor, the United Hebrew Charities of the City of New York, and the Association of Catholic Charities). Also included were any organizations (excluding settlement houses) that employed investigative social work technologies, including psychotherapeutic social work, or professionalized family counseling that reflected an embrace of scientific social work techniques. This then included a few other organizations such as the New York Society for the Prevention of Cruelty to Children that employed professional social workers to investigate allegations of child abuse.

¹⁸ The concept was introduced into the organizational literature by Hannan and Freeman (1977). Simply stated, Gause's competitive exclusion principle states “no two populations can continuously occupy the same niche to the extent that they depend on identical environmental resources” (Hannan and Freeman, 1977, p. 943).

¹⁹ This is actually the definition of a “fundamental niche.” It differs from a “realized niche” which represents the actual region of ecological space that a population occupies. A realized niche may well be narrower than a fundamental niche because inter-population competition may have driven a population out of regions of ecological space that would be otherwise inhabitable. At least for the moment, we see no reason to try and differentiate between a fundamental and a realized institutional niche in our own analyses.

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²⁰ As ecologists have pointed out, there are actually a wide variety of possible relationships between organizational forms that are operating within the same region of institutional life. For example, Brittain and Wholey (1988, p. 200) distinguish among the following sorts of relationships: full competition, partial competition, predatory competition, neutrality, commensalism, and symbiosis.

²¹ Actually, this is an oversimplification. Because two organizational forms are near one another in institutional space does not necessarily indicate that they are engaged in a jurisdictional dispute. As ecologists have pointed out, there are a wide variety of possible relationships between organizational forms that are operating within the same region of institutional life. For example, Brittain and Wholey (1988, p. 200) distinguish among the following sorts of relationships: full competition, partial competition, predatory competition, neutrality, commensalism, and symbiosis.

²² We follow McPherson with respect to the question of unit comparability. His analysis relies on widely divergent unit scales (education in years vs. occupational prestige in SEI scores, for example) but because he ultimately employs these numbers (as will we) as competition coefficients that are essentially ratios of volumes compared to one another (“pure numbers, devoid of unit”, 1983, p. 521) then the measurement units are not a concern. The matter is even less of a concern in our analyses since they begin as common Euclidean distance measures, a product of the MDS procedures.

²³ Initially, COS organizations refrained from dispensing any form of relief themselves. They concentrated on organizing charities and investigating the poor. In some cities during the 1880's, the COS campaigned against all forms of “out-door” public assistance, leading to its outright abolition in 10 of the country's 40 largest cities (including Brooklyn) (Katz, 1983, p. 191).

²⁴ One obvious concern was the sheer scale of the problem. While quantitative estimates are hard to come by, it is clear that in a city such as New York (which in 1880 had a population of 1.2 million people), the Charity Organization visitors only had direct contact with a small proportion of the tens of thousands of impoverished people who received some form of relief. Noting that “Friendly visiting...held a more important place in COS theory than in the accomplishments of most [Charity Organization] societies,” Lewis (1977, p. 99) estimates that “somewhat less than one out of every seven families assisted by COS received service from a friendly visitor.”

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²⁵ Carson (1990, chapter 3) has a useful discussion of the tension between the two groups.

²⁶ Note that we are focusing here on the total number of other organizational forms that have overlapping niche bases. Lodging houses and shelters share more than 50% of one another's niche spaces, but their intersections with other organizational forms are minimal.

²⁷ Mohr and Duquenne (1997) demonstrate this transition empirically by tracking the increasing level of complexity (and subsequent reduction in complexity) of the institutional logic of the field as measured with lattice structures that assess the fit between practices and cultural constructs of identity.

²⁸ The various ways in which COS and settlement house workers were influenced by one another is a long and complicated story that we cannot do justice to in this paper. In brief, the COS and settlement workers began to move towards something of a rapprochement after the turn of the century (especially in New York after Edward Devine takes over as General Secretary of the COS in 1896 and begins pushing a more progressive agenda). For example, in 1905 the primary publication of the COS movement, the Charities Review (published by the New York COS) merged with the primary periodical of the settlement house movement, The Commons (published by Hull House), to form Charity and the Commons (Katz, 1986, p. 160). Nonetheless, we see the distinction between the two organizational forms as persisting in a variety of important ways.

²⁹ In contrast to the COS focus on social investigations, settlement workers were reluctant to objectify their relationship with the poor. As Woods and Kennedy put the matter, “one does not document one's friends, and large numbers of people who come to the settlement would forbear if they suspected that anything in the nature of a journal of personal conduct was being kept” (1922, p. 422).

³⁰ Davis notes that when Jane Addams seconded Roosevelt's nomination at the convention she received as rousing a reception as Roosevelt himself (1984, p. 198). He also points out that a committee of settlement house workers drafted a “Social Standards for Industry” platform advocating an eight hour day, six day week, the prohibition of child labor, and a federal program for accident, old age, and unemployment insurance that was adopted nearly word for word into the Progressive Party Presidential platform (1984, p.196).

³¹ One group, allied behind Albert Kennedy, argued that the settlement should become “an experimental, educational institution with a special emphasis on arts and craft.” A second group, led by Charles Cooper, hoped to

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see a return to “the old concept of the settlement 'as a liberalizing influence in all phases of life.” Cooper thought that the organizations should “address large questions such as 'Peace, Industrial Adjustment, Government, International Relations, Free Speech, Fundamentalism“ (Carson, 1990, p. 185).

³² Michael Katz notes that “by the end of the 1920s, about half of the country's social workers considered themselves caseworkers, and many worked in specialized settings as medical social workers, visiting teachers, vocational guidance specialists, probation officers, psychiatric social workers, and personnel officials in private industry” (1986, p. 209).

³³ Roosevelt's chief architect for social policy, Harry Hopkins, had actually begun his career in social work as a college intern at a settlement house in New York City. But after college he took a position with the New York Association for Improving the Condition of the Poor and continued through the rest of his professional career to move rapidly through the ranks of the more bureaucratic side of the community social welfare field. See the introduction to Hopkins (1936).

³⁴ Note that our assertion is close to the argument that Theda Skocpol (1992) has made regarding the origins of social policy regimes. Skocpol, however, focuses on the politics of social welfare and her focus is largely restricted to the enabling effects of pre-existing state capacities and to the existing configurations of organizations that are able to influence the formation of social policy legislation at critical historical junctures. Our suggestion is that it is also necessary to study the ways in which the character of organizational forms that deliver and administer relief services, (many of which were private), had a significant imprinting effect on subsequent policy developments.

³⁵ There is a long intellectual history of seeing settlement houses as agents of social control and, as such, being essentially indistinguishable from COS agencies. There are, after all, several important commonalities. Both movements entertained idealistic fantasies about eradicating urban poverty through the reformation of local conditions. In both cases, middle class volunteers, traveling into working class neighborhoods, were seen to be the principle agents of change. And like the COS movement, the founders of settlement houses did not intend to improve urban conditions by giving financial assistance to the poor. This led many to criticize the settlement houses as being mere panaceas for much deeper and more profound structural problems. Thorstein Veblen suggested that the settlement houses largely existed to “enhance the industrial efficiency of the poor and to teach them the more

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adequate utilization of the means at hand,” and Sinclair Lewis, in one of his novels referred to them as “cultural comfort stations” (Cited in Davis, 1984, p. 17). More recently, Herbert Gans (1968) argued that settlement workers were mostly instruments of social control and Lissak (1989) emphasized that statusdistinctions and expectations of deference were a fundamental component of the relationship between settlement workers and the immigrant communities they worked with. But, as we have made clear, we think there are nonetheless many important distinctions between the two groups.

³⁶ Thanks to Marc Ventresca who proposed this formulation.

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