Social Movements and Organizational Change

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Abstract and Keywords

Organizations are increasingly subject to political demands from outside actors and their own members. Information and communication technologies (ICTs) are enabling a flourishing of grassroots social innovations and demands for justice that challenge traditional top-down theories of change. Over the past twenty years, scholars have found that social movement theory provides a useful approach to understanding movements within organizations, movements that target organizations, and movements that create organizations and industries. We review this recent work and propose an account that can help guide future research on the increasingly prevalent tide of politicallyoriented movements within organizations. We conclude that this is an especially promising domain for future research aimed at informing practice.

Keywords: social movement, organizational change, employee activism, opportunity structure, framing, social networks, mobilizing structures

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Corporations are increasingly experiencing change driven by activists inside and outside the organization. In November 2018, twenty thousand Google employees around the world walked out to protest the company's perceived history of protecting sexual harrassers. At Amazon, thousand of employee activists sought firm commitments from management to reduce the company's carbon footprint. Microsoft workers urged the company to annul an army contract for battlefield augmented reality headsets. And Salesforce workers pushed their company to cut ties to Customs and Border Protection over separating children from families on the US/Mexico border. Outside activists also used new tools to target corporations. After the Parkland school shooting in February 2018, a political website publicized a list of over thirty corporations offering discounted pricing to members of the National Rifle Association (NRA) and suggested a mass boycott of these firms. Within forty-eight hours, two dozen of these businesses had dropped their ties to the NRA, including well-known consumer brands such as Delta Airlines, Hertz, North American Van Lines, and MetLife.

In the world beyond corporations, social movements have become pervasive features of contemporary society, from the Arab Spring to the #MeToo movement against sexual harassment. These broad movements increasingly shape what happens within organizations, as internal activists take their cues from external efforts at social change.

Although social activism within organizations is not without precedent, what is new is its scale, pervasiveness, and success. Few organizations today are immune to politicized campaigns for change, from Applebee's restaurant to

the Komen Foundation (Davis and White, 2015). But why now?

Advances in information and communication technologies (ICTs), coupled with generational shifts in values, have changed the landscape for social movements and (p. 210) organizations, and increasingly erase the boundaries between them. ICTs have created a situation in which nearly everyone in the industrialized world is accessible to everyone else, at least in principle, and information flows almost without cost. The result is that the transaction costs for collective action—say, the effort required to organize a large-scale protest—can now be trivially small. One Facebook post can be the spark that brings hundreds of thousands of people to a march on the capital the day after a presidential inauguration, something that would have taken large-scale formal organization just a generation ago. Anyone with a smartphone can be a change agent now.

The same shift in transaction costs has radically re-shaped organizations as well. It is increasingly feasible to "rent" rather than "buy" the inputs to an organization and coordinate them online, allowing tiny enterprises to scale up and down rapidly without the need to invest in fixed assets or permanent employees (Davis 2016). The global media brand Netflix had only seven thousand employees as of 2019 and rented server space from Amazon. Disruptive taxi firm Lyft had fewer than five thousand employees; Pinterest, Slack, and Zoom each had fewer than two thousand. And the maker of Instant Pot, the ubiquitous kitchen appliance that created a $300 million product category, had only fifty employees, relying entirely on outside contractors for production and distribution. Anyone with a credit card and a Web connection can be an entrepreur now.

These new forms of organizing create new challenges for theories of organizational change, new domains for activism, and new opportunities for research. This chapter reviews the nascent work on social movements and organizational change. The two scholarly domains, once strictly separate, are now increasingly joined by common interests. Moreover, social movement theory provides a robust and actionable account of organizational innovation and change that has gathered a large body of research evidence since the first edition of this handbook. Here, we review recent work and outline a framework for organizational change from a social movement perspective. We believe this framework can inform both research and practice.

We note at the outset that this domain is not entirely new. Donald Schon's (1971) classic book *Beyond the Stable State* lays out a life cycle analysis of social change that describes how ideas that emerge from the periphery can come to prominence in times of social change, and the model described here contains echos of Schon's work. But perhaps the pace of change today, enabled by ICTs, is new. And we believe that some of the most exciting work on change in the next decade will be research on grassroots social innovation and political action within organizations. As we write, major disruptions are washing over corporations and other organizations. If we are to take on the challenges that our species faces today, existing institutions will need to be substantially re-tooled, along the lines of the political revolutions of generations past. It is a fruitful time for research and theory on ICT-enabled change, and a critical time for research that can inform practice.

(p. 211) Organizations and Movements Converging

Research on organizations and social movements has traditionally been taken on by separate communities of researchers with very little overlap. Organizational scholars focused on formal, bounded organizations such as corporations, and examined questions of organization design, the boundaries of the firm, the sources of organizational diversity or homogeneity, and the factors associated with superior organizational performance (Scott and Davis

2007). Since the 1980s, organizational scholars have primarily been based in business schools. Social movement scholars, mostly in sociology, examined sources of social change, particularly those that took place outside the formal polity. Like organizations, movements entailed collective action among groups of people with more or less shared aims. But the action was more likely to take place on the streets than in the suites, and the changes they sought were more momentous than the addition of ranch flavoring to a snack food brand. And social movement scholars tended to be in departments of sociology and political science.

In an immensely perceptive 1978 article, Mayer Zald—who operated in both scholarly camps—recognized the commonalities between these two domains (Zald and Berger 1978). The article was entitled "Social movements in organizations: Coup d'etat, bureaucratic insurgency, and mass movement," and made the case that there was a strong analogy between states and organizations, and that this analogy extended to the forms of activism used by organizational members to create unsanctioned change. There were coups, in which CEOs are defenestrated by others high up in the hierarchy; insurgencies, in which middle managers conspired to change organizational products or processes outside the formal approval process; and mass insurrections among the rank and file workers. In each case there were strong parallels between processes at the national and the organizational level. Although the argument is widely hailed today, its reception at the time was quite muted: as Zald (2005: 162) put it, "It seemed to have sunk in the scholarly ocean of unread papers," and garnered few citations in its first twenty years. The two fields were like twins separated at birth, largely unaware of the other's existence.

In recent times, however, both domains have been unsettled by common underlying forces that make it clear that, in many ways, organizations and movements are more alike than different. Advances in ICTs have shifted the transaction cost profiles of coordinated action within and beyond organizations. This has dramatically shifted the landscape for both movements and organizations. Governments and organizations are increasingly transparent, subject to having their secrets going viral, from Edward Snowden's exposure of internal government surveillance programs to the Sony hack that made public the divergent salaries of male and female actors and the unflattering (p. 212) emails of executives. Social media enable nearly instantaneous marches and boycotts, as well as entirely new forms of coordination and activism. Informal movements can be crystallized into formal organizations; firms can be increasingly impromptu assemblies, like pop-up restaurants.

As a result, scholars over the past two decades have worked to build on commonalities and shared concerns across these two areas (Davis and McAdam 2000). Movements can target organizations and industries, or can create climates in which new kinds of organizations thrive (Rao et al. 2000). For instance, the alcohol prohibition movement was often fatal for breweries, but transformative for soft drink producers (Hiatt et al. 2009). Movements can also "infiltrate" organizations, changing their internal practices (Zald et al. 2005). For example, corporations with gay affinity groups were quickest to create programs offering benefits to the families of LGBT employees equivalent to those of straight employees (Briscoe and Safford 2008). And organizations can be components of movements themselves, taking on activist political stances. When Arkansas's legislature passed a bill enabling businesses to discriminate against LGBT customers on the basis of "religious freedom," Walmart successfully lobbied the state's governor to veto the bill, arguing for the benefits of diversity. Thus, the intersection of movements and organizations has become an increasingly fruitful scholarly domain, yielding dozens of articles and several collections (Davis, McAdam, Scott, and Zald 2005; Davis et al. 2008).

In this chapter, we review the recent outpouring of literature, but much of our focus is on a specific emerging domain: the rise of social movements within organizations as a significant new form of organizational change that connects societal concerns with dynamics within the organization itself.

Recent Research on Movements in and around Organizations

Since 2005 there has been a blossoming of research on movements *within* organizations, movements *targeting* organizations, and movements *creating or facilitating* organizations. We provide a brief review of research published over the past fifteen years, organized by theme, and provide some provisional conclusions. Our review provides a compact but fairly comprehensive update of what has been published in this domain since its foundational statements (Davis et al. 2005). After reviewing this work, we provide a synthetic account intended to spark further work on internal social movements.

Movements *within* Organizations

The literature on social movements within organizations highlights the fact that challengers face a high level of personal risk: their efforts often target incumbents in the (p. 213) same organization who hold higher power and can retaliate against them. In these circumstances, several factors enable activists to self-organize.

First, a physical "safe space" enables challengers to interact and discuss their ideas prior to going public. Kellogg (2009) defines *relational spaces* as areas of isolation, interaction, and inclusion where reformers can develop a unified collective for change. For healthcare professionals, afternoon rounds meetings in hospitals served as relational spaces: they were staffed with only reformers, and thus enabled reformers to build a new relational efficacy, identity, and frames without the fear of retaliation from defenders. Second, an *opportunity structure* inside an organization increases the chance of movement's success, thereby helping challengers take personal risks to mobilize themselves in the early phase of the movement. Briscoe et al. (2014) found that a CEO's political liberalism provided a cue that facilitated the formation of LGBT employee groups. Over time, however, as the movement developed and gained widespread acceptance, CEO ideology became less critical.

The existence of an *opportunity structure* also facilitates movement success. Kim et al. (2007) show that the weakened power of the government agents during the political democratization of the mid-1980s in South Korea enabled faculty in public universities to force their universities to abandon a conventional appointment system and adopt a direct voting system for the university presidential election. Kellogg (2011a) highlights the importance of political opportunities and the toolkits available to challengers. For activists seeking to reduce work hours for residents in their hospital, toolkits included facilitative staffing systems, openly supportive allies and non-repressive evaluation systems. It is important to note that organization-level political toolkits were partially available due to institution-level political opportunities. Institution-level political opportunities included the introduction of a new regulation supporting challengers' agenda, an increase in the size of the female workforce, and an undersupply of general surgery applicants. The level of challenger organization and cohesion also increased the odds of success.

Organized challengers have higher bargaining power than individuals, and they are under less threat of personal penalty that can be posed by incumbents. For example, Kim et al. (2007) find that universities with a faculty council were more likely to adopt new practices than those without. Thus, defenders may try to divide challenger coalitions. Kellogg (2012) finds that defenders rely on status distinctions as a tool to divide reformers, associating the proposed reforms with low-status markers and seeking to re-integrate higher-status reformers into the defender group.

Last, more recent work documents how organizations are not simply bounded entities that neatly contain movements, but are part of an overlapping field in which organizational and personal relationships provide conduits for

tactics and ideas to spread (DeJordy et al. 2020). In the campaign to get equal rights for LGBT employees and their families in Minneapolis/St. Paul, activists were enmeshed in an "inhabited ecosystem" that cut across organizations. And as this article showed, progress is not inevitable.

(p. 214) Movements *Targeting* Organizations

How do social movements targeting organizations emerge and develop? There are several potential sparks for movement emergence. One category is cultural artifacts such as books, movies, and news stories. Vasi et al. (2015) report that activism against hydraulic fracturing (fracking)—an unconventional method of extracting natural gas—used the documentary "Gasland" as a mobilizing tool. Just as Rachel Carson's 1962 book *Silent Spring* raised public awareness of the danger of DDT, "Gasland" raised public consciousness about the dangers of fracking for drinking water and health. The documentary's nationwide release on HBO and nomination for an Oscar award increased online discussion about fracking on Twitter. Increased online discussion led to a higher number of organized events, and local screenings increased local mobilizations within the following two months, which in turn led to local bans on fracking.

News about other stakeholders' actions and reactions to target organizations affect the strength and nature of future reactions by focal stakeholders. This echoes the model of Schon (1971) described previously. Dorobantu et al. (2017) highlight the role of critical events for the emergence of a critical mass of social and political stakeholders targeting or defending an organization. Critical events are irregular, stakeholder-initiated actions and reactions targeting an organization such as court decisions that are unfavorable to the target organization. More specifically, the study highlights the roles of stakeholders' prior beliefs about a target organization, the nature of the reaction of peer stakeholders, and the status or visibility of reacting stakeholders on the development of social movement. Following a critical event, stakeholders who had positive prior beliefs about the organization mobilize to defend it, while stakeholders who had negative prior beliefs reinforce their opposition. Also, immediate positive reactions of peer stakeholders following a critical event lead to subsequent positive reactions, while immediate negative reactions of peer stakeholders lead to subsequent negative reactions. Finally, the study shows that the higher the status or visibility of the stakeholders that reacted after the critical event, the more pronounced the reaction by other stakeholders and shareholders.

We note that these critical events need not be construed as the *cause* of social movement activity. Grievances or innovations may be lying dormant, waiting for the right movement to gain tractions. This is one of the insights of the *political opportunity structure* view of social movements (esp. McAdam 1998). Key events, such as the Supreme Court's Brown v. Board of Education decision, did not conjure the civil rights movement out of thin air, but served as focalizing points for activism.

Several factors are associated with movement success in influencing target organizations. First, shareholders are typically more effective than other outsiders at bringing about change at the top management level. Vasi and King (2012) compare the effects of environmental activism by shareholders vs. non-shareholder outsiders in shaping perceived environmental risk, finding that shareholder resolutions are more influential than protests, demonstrations, boycotts, or lawsuits initiated by non-shareholder (p. 215) outsiders. Shareholder grievance are perhaps more legitimate in the eyes of risk managers than that of non-shareholder outsiders, as their economic interests are more closely aligned with those of the firms.

Second, directly influencing firms' political and regulatory environment is more effective than engaging in protests or boycotts. For example, Hiatt et al. (2015) compared the effectiveness of public political tactics (i.e., activists'

testimony at congressional hearings) and private political tactics (i.e., protests) on firms' likelihood of adopting a new practice that addressed climate change, but at a cost to the firm. The public tactic increased practice adoption by increasing regulatory risk, while the private tactic led to more symbolic responses decoupled from actual change in practice. McDonnell and King (2013) similarly find that when firms are targeted by boycotts, they try to neutralize the reputational threats by making prosocial claims (e.g., issuing a press release associating themselves with pro-social activities) without directly addressing boycotters' concerns or changing their internal practices.

Boycotts or other campaigns by outsiders can still be effective when target firms are particularly vulnerable. King (2008) finds that companies were more likely to concede to boycotters' demands in the wake of declines in sales or reputations. Target firms were also more likely to concede to boycotts that receive high levels of media attention because they can disrupt organizational routine, impose costs, and shape negative public perception about the target firms. Zhang and Luo (2013) also highlight that a sense of organizational vulnerability spurs firms to respond to campaign demands more quickly. Firms were quicker to donate to disaster relief when they were targeted by online campains, when corporate donations were subject to greater online publicity, and when firms had higher reputations.

Fourth, social movements that affect firms' internal polity and perceived investment risk can lead to movement success. Weber et al. (2009) show that the anti-biotech movement in Germany influenced pharmaceutical firms' commercialization of biotechnology by threatening the status of internal elites inside organizations, undermining elite unity and increasing the perceived uncertainty of investment in biotechnology. Interestingly, movement activism was a source of imprinting. Firms that located their biotechnology operations abroad in response to the domestic opposition suffered from fragmented structure and increased coordination cost. These challenges continued to have an impact on firms by impeding development and commercialization of the new biotechnology. However, the movement's imprint was weak for new pharmaceutical firms that out-waited the peak of the social movements.

Fifth, social movements targeting firms in an industry can have a successful outcome when actors along the commodity chain in the industry share a low level of understanding about the nature and attributes of their products. Schurman and Munro (2009) explain that a critical factor that can create opportunities for activist challengers is incumbents' low cultural-economic cohesion—the degree to which actors along the chain share an understanding of their business worlds and of a product's attributes. The anti-biotech movement in Britain was largely successful because actors along the genetically modified food chain such as retailers, consumers, biotech companies, and farmers (p. 216) had low cultural–economic cohesion. In the US, in contrast, the movement had negligible impact because actors along the commodity chain had a high cultural–economic cohesion.

Practices that were initially adopted due to activism can also spread beyond targeted firms by standard diffusion processes. Briscoe and Safford (2008) find that the adoption of domestic partner benefits for LGBT employees was especially likely to influence later adopters when the earlier adopters were "activism resistant" firms, which they label the "Nixon in China" effect. In addition, different activist tactics have different effectiveness in inducing practice adoption among non-targeted organizations. Briscoe et al. (2015) find that the contagious effect of independent and evidence-based adoptions by targeted organization is greater than that of disruption-linked adoptions by targeted organization. The study examined a voluntary adoption of a practice by non-targeted universities and colleges during the Rein-in-Russell campaign organized by United Students Against Sweatshops (USAS). When USAS used disruption-linked tactics such as sit-ins against target organizations, non-targeted organizations make poor inferences about the merits of the new practice. On the other hand, when USAS used independent and evidence-based tactics such as organization of victim testimonial events against target organizations, non-targeted or-

ganizations have informed evidence about the merits of the new practice. During the victim testimonial events, university administrators at target organizations learned about the poor working conditions at their licensed suppliers, and this information was transmitted through their university networks, increasing voluntary adoptions of the practice among non-targeted organizations.

Who gets targeted? Bartley and Child (2014) find that the companies most likely to be targeted are larger companies, branded marketers (manufactures without factories), companies engaging in major advertising or brand activities, and firms with a positive reputation in the business communitiy. What are the effects of being targeted? McDonnell and Werner (2016) highlight a disruptive effect of activism on corporate political activity. The study finds that social activists' challenges decreased politicians' willingness to associate with the targeted firms. More specifically, boycotts led to a significant increase in the proportion of political contributions that were refunded to the donor, as well as a decrease in invited congressional appearances and awarded government contracts. Also, King and Soule (2007) found that a targeted firm's stock price was negatively affected when protests targeted issues dealing with critical stakeholder groups such as labor or consumers, and when protests generated greater media coverage.

Firms respond to being targeted by activists in diverse ways that vary in their effectiveness. McDonnell et al. (2015) find that when firms face more activist challenges such as boycotts, they are more likely to adopt social management devices such as instituting a formal CSR board committee and disseminating a CSR report. They also find that shareholder proposals, and not boycotts, lead firms to disseminate CSR reports because firms seek to counter the perceptions of risk among industry analysts and investors that are prompted by the proxy proposals. Once firms adopt social management devices, they become more receptive to future activist challenges. The study sheds light on the (p. 217) dynamic process through which corporate opportunity structures evolve over time in response to activist challenges. Other strategies that firms use to prevent future protests include participation in corporate-sponsored activisms (McDonnell 2015) and withdrawing a plan to open a new store if they face protests when released new store proposals in the region (Ingram et al. 2010).

Movements *Creating or Facilitating* Organizations and Industries

How do social movements enable the emergence of new industries? Weber et al. (2008) describe how social movements created a market for grass-fed beef and dairy products in the US. The study highlights that social activists used cultural codes to shape a new market and direct entrepreneurial activities. A coalition of activists employed cultural codes of authenticity, sustainability, and naturalness to motivate entrepreneurial production and shape the direction of innovation. Activists also utilized the cultural codes of manipulation, exploitation, and artificiality to establish external boundaries and foster internal cohesion, which helped create a positive collective identity for the new producer community. Furthermore, members of the coalition of activists helped create the nascent market by bridging the social distance between producers and consumers, creating an alternative infrastructure for distribution, and helping market participants agree on the quality dimension of the new product for valuation.

Similarly, Sine and Lee (2009) focused on the role of social movement organizations in promoting entrepreneurial activity to develop a wind energy sector. Environmental social movement organizations articulated problems associated with traditional technologies and inputs while promoting wind power as an environmentally benign alternative. In addition to constructing transformative framing that shifted values and norms surrounding electricity generation, environmental social movement organizations also staged lobbying campaigns directed towards regulators, which led to increased entrepreneurial activity in the wind power sector. Environmental social movement organiza-

tions also offered pre-existing social structures—a network of supporters of renewable energy—that are valuable to entrepreneurs. Greve et al. (2006) also highlight social movement's effort to attract entrepreneurs to create a new market. The study examines how microradio activists facilitated establishment of low-power FM (LPFM) radio stations in order to challenge the domination of radio by corporate chains. By putting diverse voices onto the airwaves, microradio activists sought to attract audiences for these new voices, and ultimately reduce the influence of corporate chain-owned stations. Microradio activists formed Micro-radio Empowerment Coalition, and elicited applications from entrepreneurs to found LPFM stations in local communities.

Second, groups of incumbent firms can initiate social movements to differentiate their products from those of peer firms. Bartley (2007) describes the process through which the market for certified wood was created through a political contestation among (p. 218) a wide array of actors that consist of firms, NGOs, SMOs, and governments. In response to tropical timber boycotts, environmentally conscious small specialty firms called for forest certification system that could differentiate their products from those produced by peer firms in the forest product industry. Discussions about the certification system continued and led to the formation of the Forest Stewardship Council (FSC) driven by environmental NGOs with support from governments and foundations. After the formation of the FSC, industry associations were able to develop forest certification programs, creating the market for certified wood.

Last, a new industry can be created as an unintended consequence of social movements that targeted other industry. Hiatt et al. (2009) describes how the Woman's Christian Temperance Union (WCTU) contributed to the decline of the brewery industry, which resulted in the unintended emergence and growth of the soft drink industry. The WCTU attacked the normative, regulative, and cognitive basis of the brewery industry by promoting temperance norms, supporting anti-alcohol laws, and campaigning for pro-temperance education. The movement not only resulted in the failure of the brewery industry, but also unintentionally created new entrepreneurial opportunities in the soft drink industry. The movement facilitated the founding of soft drink firms by inspiring entrepreneurs to produce alternative drinks, creating financial opportunities in the alternative market, and freeing up needed resources for the entrepreneurs to start their new businesses.

There are other ways that movements can enable the emergence of new types of organizations. Schneiberg et al. (2008) explain that the Grange—an anti-corporate movement in the US—fostered cooperatives and mutuals that were membership-based, mutual benefit associations which differed from for-profit corporations. In the face of blocked political access, the Grange shifted from politics to private strategies of economic self-organization, promoting alternative organizational forms. The authors describe the social movements as "organization-generating organizations." The authors argue that the Grange fueled cooperative forms as an alternative to politics or in response to blocked political access. This explanation is based on the finding that the positive effect of Grange membership on mutual self-organization was weaker in states where Grangers won political victories.

In addition, when challengers and incumbents can discover their convergent interests, they can collectively found a new type of organization that serves their collaborative goals. For example, O'Mahony and Bechky (2008) show that community projects in the open-source software movement and incumbent corporations in the proprietary software industry discovered convergent interests, and created nonprofit foundations to serve their mutual benefit. More specifically, members of the community projects were interested in enhancing the technical quality and expanding the user base of their code, which incumbent corporations could help. Incumbent corporations were interested in solving difficult technical problems and recruiting skilled programmers, and collaboration with the community projects allowed them access to talented programmers. The two parties created nonprofit foundations to

serve as boundary organizations which help reinforce their convergent interests while allowing their divergent interests to coexist.

(p. 219) Social Movements within Organizations: A Model of Change and Innovation

Social movements have become increasingly pervasive in and around organizations. Social issues that used to be consigned to the environment outside organizations now penetrate everyday life within their walls. In this section, we provide a framework from the study of social movements to systematize the study of member-led movements within organizations as a form of organizational change and innovation, drawing on Davis and White (2015). We note at the outset that there has been relatively little research on the process of social movement activism within organizations, in part because the phenomenon has only recently emerged in force in the real world. Thus, we consider this framework to be a prospective guide to future work more than a well-validated theory.

The textbook synthesis model of social movements contains four core elements that give rise to movements aimed at social change and that shape their effectiveness (McAdam 1982; McCarthy and Zald 1977; Tilly 1978). These four elements in effect translate into four questions about movements: When? Why? Who? and How? Notably, social movement scholars in the "dynamics of contention" school see movements as inherently processual: movements should be examined, not in terms of covering laws (if X then Y), but in terms of the recurring mechanisms that underlie contentious politics (McAdam et al. 2001), and we take our cue from this turn. Thus, it is rarely the case that "whenever you see a grievance, you will see a successful movement mobilize." Instead, what we can hope for are regularities in *mechanisms*—that it often happens that A triggers B, and B may lead to C or D.

When: Opportunity Structure

The *political opportunity structure* describes the broad contours of the social context in which change occurs, and recent events that have made purposeful change more or less feasible (McAdam 1982). Why is now the right time for change? Why not last year, or next year? Consider the African-American civil rights movement. Why did it flourish and achieve its greatest successes in the late 1950s and 1960s and not earlier? If the timing of movements was driven entirely by the level of grievance experienced, then we might have expected the movement to crest after the end of Reconstruction led to a resurgence of white supremacist policies in the South, or after the Plessy v. Ferguson decision legalized segregation in public accommodations, or after President Wilson segregated the civil service, or after any number of large-scale injustices. Arguably, it was Truman's desegregation of the army and the Brown v. Board of Education decision that (p. 220) signaled that the political system was open to large-scale change that was impossible before—in short, that the opportunity structure had shifted (McAdam 1998).

Examining the political opportunity structure provides insights into the dynamics and timing of social movements and can be extended to explain the timing of successful innovations. It highlights the inherently processual nature of social movements: their emergence and success depend crucially on their timing.

In the context of organizations, the opportunity structure for employee activism includes an organization's strategy, structure, culture, and executive changes that make a change more or less timely. For instance, when William Clay Ford Jr. took over as chairman of Ford Motor Company in 1999, his environmental commitments signaled that em-

ployee-led green initiatives would face a more welcoming climate—as, indeed, they did (Davis and White 2015). Broader social trends, including external social movements, can also signal opportunity for internal activism. The #MeToo movement set the stage for the Google walkout in November 2018, and protests against the treatment of immigrants gave momentum to efforts by employees at tech firms to cut ties to the Customs and Border Protection agency.

This suggests two observations. First, member-led movements can be seen as a mechanism for connecting the social and political environment of the organization to change in its internal operations (cf. Zald et al. 2005). Organizational boundaries are permeable; politics flows in both directions. Second, researchers can use external movements as a cue to potential upcoming changes. One of the great extant research questions is what distinguishes those movements that make the transition from external social movement to internal practice (e.g., #MeToo) from those that do not.

Why: Framing

Framing describes how potential changes or innovations are conveyed to constituencies in ways that fit (or not) with broader cultural themes. It is the language and stories that are more or less compelling at persuading potential allies and decision-makers that a change is right. Frames suggest a diagnosis of a problem, a preferred set of solutions, and a motivation to pursue them (Snow and Benford 1988).

In the context of organizations, activists are more likely to be effective to the extent that the words, metaphors, and forms of evidence they use to make their case are aligned with the organization's culture (Weber 2005). Scholars have created increasingly sophisticated methods of analyzing corporate cultures to uncover the core underlying assumptions that shape what a compelling case is (Weber et al. 2013). What makes for a persuasive framing in a high-tech business may be very different than in a traditional manufacturer, or a family-owned business. The researchable implication is that the more closely a frame for change aligns with an organization's culture, the more effective it is at recruiting followers and the more likely it is to be successful. That is, rather than seeking the universal ingredients for a successful "pitch," it makes more sense to examine the fit between the organization's context and the character of the proposed frame.

(p. 221) We note here that there is a parallel stream of work on issue selling in organizations (Dutton and Ashford 1993; Dutton et al. 2001), which is reviewed elsewhere in this handbook.

Who: Social Networks

Change takes place through interactions among people and organizations, and understanding the *social networks* that connect potential allies and decision-makers can greatly speed the process of change by making ideas and innovations contagious. While "network" was once a relatively fuzzy metaphor for the social connections among people, it has evolved into an increasingly sophisticated toolkit for the social sciences and for activists. And with the advent of online social platforms such as Facebook, mapping and activating networks is now a nearly indispensable part of conscious efforts at social change. Moreover, the tools of network analysis are increasingly accessible to non-specialists, who throw around terms like "geodesic" (the shortest network path between two nodes) and "eigenvector centrality" (being well connected to the well-connected). With an Excel add-in and metadata from an organization's email server, almost anyone can draw a network map.

Network analysis suggests the conditions for success at efforts for change. Chuck Tilly (2004) argued that protests are more influential to the extent that participants convey that they are WUNC—worthy, unified, numerous, and committed. Similarly, the more numerous the supporters of a change initiative are perceived to be by decision-makers, the more likely their chances of success. Network analysis can be used to target new recruits, to find the shortest pathways to decision-makers, and to focus resources on the best-connected targets for influence. An accurate network map can be an extremely valuable tool for purposeful social change efforts. But not all movements go viral. For instance, in January 2001, the UN's Secretary General Kofi Annan spoke to a large group of members of the US Chamber of Commerce, imploring them to devote their resources—or at least their name—to the global effort to combat the HIV/AIDS pandemic. Joining the Global Business Coalition (GBC) cost only $25,000 ("Less than a benefit table at the opera," as its CEO Richard Holbrooke quipped), and the show of unity would be powerful. But while joining the GBC spread through networks—a handful of well-connected corporate directors evidently persuaded a number of the firms on whose boards they served to join—within a few years it had topped out at only 5% of the Fortune 500 (Davis and Anderson 2008). Not all efforts at change will succeed, even if the network processes are understood.

Here again, there is a clear agenda for future research on grassroots change initiatives to track the patterns of diffusion through networks. One might, for instance, track the spread of support for employee petitions in tech firms aiming to cut off disfavored clients by examining social networks and the sequencing of endorsements. As change efforts are increasingly organized online, they leave behind traces that can greatly aid research.

(p. 222) How: Mobilizing Structures

The fourth dimension describes the technological, social, and physical systems that can be used to *mobilize action*. Any social system contains vehicles that serve to channel social interactions and can translate latent support for change into active support. The civil rights movement, for instance, relied heavily on the network of Black churches in the South, as Aldon Morris (1984) has documented. Churches provided safe space for meetings, membership for recruiting, access to resources such as financial and legal support, and dense ties to local colleges and ministers in other locations. Moreover, they created a vehicle for the spread of particular movement tactics, such as lunch counter sit-ins.

ICTs have greatly changed the prospects for mobilizing by creating low-cost and pervasive channels of communication. Activists these days largely rely on social media such as Facebook and Twitter, and online infrastructure such as Slack or Loomio, to coordinate their actions most efficiently. Jennifer Earl and Katrina Kimport (2011) were pioneers in theorizing the effects of new online tools and platforms for organizing collective action. Both the speed and the content of movement organizing look different now. A Facebook post the day after an election can catalyze a march that brings a half-million people to Washington. Gender inequities in pay can be uncovered via a shared Google doc. And even websites can go on strike, as happened in response to the "Stop Online Piracy Act" that was opposed by Google, Wikipedia, and other online destinations.

Within organizations, the new online tools mean that management no longer has a lock on information. Both public forums such as Glassdoor, and internal vehicles such as Slack channels, allow members to share what goes on within the hidden domain of the workplace. Once again, as new tools spread, the prospects for member-driven change expand.

In its simplest form, this framework suggests that movements are effective to the extent that the political opportunity structure is receptive, the proposed change is framed in ways that fit the opportunity and motivate participants,

the right allies are mobilized and the right decision-makers reached, using the appropriate tools for mobilizing and coordinating participation. But the *how* of movement mobilization and contestation is still somewhat under-specified. To date, the majority of published studies have sought to explain variation in observable indicators, as is encouraged by our academic journals and their love of regression tables. But not all changes fit this mold, and sampling only cases that yield observable success or failure (say, adoption of a policy or not) is methodologically suspect. Here, we must note the critical role of embedded ethnographic accounts, such as Kate Kellogg's exemplary work (Kellogg 2011b) and dense engagement across an entire interdependent field, such as DeJordy et al. (2020).

What exactly are member-activists trying to change? Interviews with social innovators in companies suggest that social activists pursue four kinds of innovation in organizations (Davis and White 2015). The first is influencing the kinds of *products and services* the organization offers to create value that extends beyond profit. This is (p. 223) sometimes called "intrapreneurship" or "corporate entrepreneurship," although we distinguish socially oriented intrapreneurship from more generic efforts at innovation. An example here might be Vodafone's M-Pesa, a mobile-phone-based payments system that piloted in Kenya and spread from there.

The second is *practices*, that is, making the operations of the organization more sustainable. Innovations in this domain can include efforts at lowering the firm's carbon footprint, greening supplier operations, and ensuring human rights and equitable labor practices in the supply chain. Here, Ford Motor Company's commitment to freshwater access as a human right, championed by one of its middle managers, ensured that its overseas factories would operate in a sustainable way.

The third is *people management* that is, making the workplace more just and rewarding. Thanks to the efforts of a committed human resource manager, Michigan's Cascade Engineering created an award-winning program to recruit employees from public assistance programs and provide support services for full-time employment, including an onsite social worker. The program has itself gone viral across the local labor market to other companies in Western Michigan.

The fourth is *engagement with the community* beyond the walls of the organization. IBM's Corporate Service Corps, which provides pro bono services by multidisciplinary teams to governments and nonprofits in low-income countries, was championed by a relatively junior MBA and former Peace Corps volunteer, and has become widely emulated in corporate America.

This rough typology highlights that member-led efforts at innovation and change can be aimed at a wide variety of organizational domains.

Principles of Change: a Movement-Based How-To

One of the virtues of the social movement framework on member-led change is that it creates a set of relatively straightforward guidelines for change that take the form of big questions (When? Why? Who? How?) as well as some more granular ones. Below we list some suggested queries to help guide the actions of member activists. These questions are primarily intended for changemakers, but can also spark questions for researchers seeking to explain choices and outcomes.

When?

• What has changed in terms of organizational priorities in the past few months? How does your initiative fit with current priorities?

(p. 224) • What has changed in terms of organizational leadership, which may open new opportunities to find a senior champion for this initiative?

• Would conditions become more or less favorable by waiting three months? Six months?

Why?

• What is the dominant culture of this organization like? What beliefs and values drive member behavior?

• What are the ingredients of a persuasive argument in this organization?

• What is a high-level pitch ("master frame") that speaks to this culture? How might this master frame be adapted to the interests and priorities of each of the key people in the decision-making system?

Who?

• Who are the most critical decision-makers for this initiative? What do they most care about? Who do they turn to for advice?

• When you think about the whole system that this initiative affects, who are the influencers? Who is especially well connected? Whom do others seek out for advice? Who is especially persuasive?

How?

• What are the existing mobilizing structures for getting this kind of initiative started, and supporting its ongoing viability? (Diversity councils, brown bags, corporate intranet, etc.)

• Where could you consider launching a pilot?

• What analogous initiatives have gone before and succeeded that you could use as favorable points of comparison? What unsuccessful initiatives should you differentiate from?

• How can you use technology to mobilize and organize people, especially in disparate geographies?

Strengths and Criticisms

Issues of social justice are increasingly central to organizations, from Walmart to Nike to Google. And although organizational leaders might prefer to avoid becoming entangled (p. 225) in politically contentious issues, for many of them this is no longer an option. In August 2013, Starbucks was the "beneficiary" of an unwanted nationwide demonstration by gun-toting fans of its laissez-faire policy on open carry in its stores, as well as counter-protests by opponents. Store managers found themselves to be unwilling frontline participants in the national debate on gun control, happening right in their stores. A few months later, Mozilla faced a storm of criticism inside and outside the organization, including employee walkouts, after appointing a new CEO who had previously supported a ban on same-sex marriage in California. And after Delta Airlines cut its NRA member discount program following the

Parkland school shooting and a threatened boycott, the legislature in its home state of Georgia shelved a proposed tax break for the firm unless it reinstated the benefit. (Delta refused.)

Politics is no longer optional for many organizations. Employees, customers, and partners now scrutinize firms and their leaders for their political stances, and in a world where alternative products and services are just a click away, it is incumbent on firms to make informed choices. In this context, social movement theory offers an appealing toolkit for understanding and creating organizational change.

In the current synthesis, movement researchers are highly attuned to processes and mechanisms rather than simple mechanical rules for bringing about change. For movements (and change efforts) to succeed requires a series of phases of activity: choosing the right timing based on the opportunity structure, framing the case for change in a way that fits with the culture and setting, locating decision-makers and allies to create a network for change, and mobilizing via the appropriate platforms for action. Moreover, new tools for both research and activism create opportunities for fine-grained analysis, from mapping the social networks that support (or fail to support) change to computerized content analyses of corporate documents to diagnose the culture. And as movements are increasingly organized online, they leave behind archival data that should enable much more granular analyses of change efforts and what distinguishes those that succeed from those that do not.

To date, however, most research on movements and organizations has focused on external efforts at change rather than grassroots internal change initiatives. This is partly due to data availability: protests, boycotts, and shareholder proposals leave behind data that lend themselves to quantitative and comparative analysis. Internal change efforts are by definition less visible, and rarely leave systematic evidence available to the outside world. (Exceptions would include labor strikes and changes in policy, such as the adoption of domestic partner benefits—see Briscoe and Safford 2008). Moreover, while successful change efforts may become visible to the outside world, unsuccessful ones are likely to disappear from view. Thus, there is likely to be a built-in bias toward studying success and neglecting failure.

On the other hand, the fact that movements are increasingly mobilized via online platforms opens up the possibility of new and larger-scale comparative studies of change. Facebook and Twitter hosted much of the discourse around the Arab Spring, and Facebook played an infamous role in the 2016 US election. These data are, presumably, housed on servers somewhere. Similarly, the local chapters of the Indivisible (p. 226) movement that began in November 2016 overwhelmingly organized their activities on Loomio, a platform for dialogue, decision-making, and task allocation created by a worker-owned cooperative in New Zealand. For an intrepid doctoral student, this could be the raw material for an outstanding dissertation comparing the trajectories of more and less successful local chapters. And of course, Google hosts email servers for tens of thousands of organizations, many of them undergoing change efforts.

In short, we may be on the verge of an intriguing new era in research on organizational change, both in the "what" (member-led initiatives oriented toward social change) and the "how" (comparative large-sample studies using big data). In our estimation, social movement theory will be a critical component.

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