ORGANIZATIONAL IMAGINARIES: TEMPERING CAPITALISM AND TENDING TO COMMUNITIES THROUGH COOPERATIVES AND COLLECTIVIST DEMOCRACY

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ORGANIZATIONAL IMAGINARIES: TEMPERING CAPITALISM AND TENDING TO COMMUNITIES THROUGH COOPERATIVES AND COLLECTIVIST DEMOCRACY

EDITED BY

KATHERINE K. CHEN
The City College of New York and Graduate Center, CUNY, USA

AND

VICTOR TAN CHEN
Virginia Commonwealth University, USA

United Kingdom – North America – Japan
India – Malaysia – China

Emerald Publishing Limited
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INVESTOR IN PEOPLE

This volume is dedicated to Joyce Rothschild and other scholars who have persisted in researching, teaching, and mentoring about the multiplicity of organizing possibilities.

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ABOUT THE CONTRIBUTORS

Katherine K. Chen is an associate professor of sociology at The City College of New York and Graduate Center, CUNY; she is an organizational ethnographer who specializes in studying prefigurative and other voluntary organizations that create communities. Her publications include the award-winning *Enabling Creative Chaos: The Organization Behind the Burning Man Event* (University of Chicago Press, 2009).

Victor Tan Chen is an associate professor of sociology at Virginia Commonwealth University. He is the author of *Cut Loose: Jobless and Hopeless in an Unfair Economy* (University of California Press, 2015) and (with Katherine Newman) *The Missing Class: Portraits of the Near Poor in America* (Beacon Press, 2007), named by *Library Journal* as one of the Best Business Books of 2007. He received the 2017 Dunlop Outstanding Scholar Award from the Labor and Employment Relations Association. His work has been featured in the *Atlantic*, BBC News, the *New York Times*, and NPR. He also edits *In The Fray*, an award-winning magazine devoted to personal stories on global issues.

Thibault Daudigeos is a professor of organization studies at Grenoble École de Management. His research interests focus on the responsibilities of the modern corporation to serve the common good and on alternative organizations that foster social and environmental innovations. He is the head of the research chair Inclusive Sustainability: Territorial Ecosystems in Transition and launched the grande école third-year specialization Innovation for Transition. He was co-editor-in-chief of *M@n@gement* from 2017 to 2020.

Leanne Hedberg recently completed her PhD in business administration at the University of Alberta, specializing in strategic management and organization. Prior to earning her PhD, she was an executive leader of for-profit and nonprofit organizations. Her research focuses on how organizations can contribute to the realization of the UN's Sustainable Development Goals through social enterprises, social innovations, and cross-sector or multi-stakeholder collaborations. She has a particular interest in the development of sustainable food systems. Her work has been accepted for publication in *Organization Science* and has been published in *Human Resource Management Review*. She has also published numerous business cases on sustainability.

Stéphane Jaumier is an associate professor of management control at Grenoble École de Management. His research interests include questions of organizational democracy and, more generally, those of power, control, and resistance within

alternative organizations. He focuses in particular on worker cooperatives, to which he applies perspectives and methods drawn from anthropology. He currently heads the Alternative Forms of Markets and Organizations research group.

Seon Mi Kim is an associate professor of social work at Ramapo College of New Jersey. Her research focuses on social and solidarity economic approaches for low-income minority women and communities, including cooperatives, social enterprises, and alternative community economic development movements. Recent projects explore how the management strategies of cooperatives and labor unions affect the job quality of minority female home care workers. She previously worked on issues of women's empowerment and democracy as a policy director at Korea Women's Associations United for 10 years. She is also the founder of UC Smiles, a local currency movement agency in Urbana-Champaign, Illinois.

Christa R. Lee-Chuvala is an assistant professor of social sector leadership in the College of Business and Leadership at Eastern University in Pennsylvania, where she teaches a range of courses on organizational leadership and development, economics, and data analysis. She studies urban economic development, focusing on the ways in which inequality and poverty manifest across different dimensions, including spatially and organizationally. Prior to academia, she worked in community development and international development. She holds a master's degree from Harvard and a PhD in urban and regional studies from MIT.

James M. Mandiberg is an associate professor and chair of the Organizational Management and Leadership Program at the Silberman School of Social Work at Hunter College, City University of New York. His primary research is on social enterprise and social innovation that engages highly stigmatized and excluded populations through identity-community economic development. Prior to his current position, he was on the faculty at two Japanese universities, the University of Wisconsin–Madison, and Columbia University, and held several executive management positions in social services. His doctoral training was jointly in organizational psychology and organizational sociology at the University of Michigan.

M. Paola Ometto is an assistant professor of management at California State University San Marcos. She earned a PhD in business administration at the University of Alberta, specializing in strategic management and organization. She also received a PhD in public administration from EAESP-FGV (Getulio Vargas Foundation's Sao Paulo School of Business Administration). Her research interests are social movements, social enterprises, communities, and institutional theory. Her work has been published in the journals *Business & Society*, *Organização & Sociedade*, and *Idéias*.

Sanjay Pinto is a US-based researcher and writer studying sexual and racial harassment in the workplace, the politics of solidarity, models for expanding

worker ownership and control, and labor organizing using digital tools. He is a fellow at the Worker Institute at Cornell and the Rutgers School of Management and Labor Relations and consults with the training and employment funds of the healthcare union 1199SEIU and different philanthropic organizations. He has a PhD in sociology and social policy from Harvard University and an MSc in development studies from the London School of Economics.

Jonathan Preminger is a lecturer at Cardiff Business School, UK, and author of *Labor in Israel: Beyond Nationalism and Neoliberalism* (Cornell University Press, 2018). His research encompasses industrial relations, employee ownership, and the sociology of work, where he focuses on collective voice, inclusion, participation, and citizenship.

Joyce Rothschild is professor emerita at Virginia Tech, having served as a professor in the university's Department of Sociology and School of Public and International Affairs for 27 years. Her research projects have had several empirical foci – from worker cooperatives to whistle blowers – while her writing has returned frequently to the question of how organizations can accomplish their purposes without hierarchical control. Overall, her work develops a collectivist-democratic alternative to bureaucracy – that is, a form of organization that effectively offers voice and agency to all of its members. Her book with J. Allen Whitt, *The Cooperative Workplace: Potentials and Dilemmas of Organizational Democracy and Participation* (Cambridge University Press, 1986), won the C. Wright Mills Book Award from the Society for the Study of Social Problems.

Marc Schneiberg is the John C. Pock Professor of Sociology at Reed College. He is an economic and organizational sociologist whose research focuses mainly on the rise, contemporary fates, and economic consequences of organizational diversity and alternatives to giant shareholder corporations in American capitalism. This work first addresses the evolution of cooperative and other alternative enterprise systems in the United States, including electrical and agricultural cooperatives, insurance mutuals, community banks, and credit unions. It also addresses how such systems can help reshape markets, subject corporations to countervailing forces, and foster both resilience and more broadly shared prosperity in local economies. He also studies institutions, their relationships with social movements, and economic governance, including association, regulation, and self-regulation in American manufacturing and finance. He has served on the executive council of the American Sociological Association, currently serves on the executive council of the Society for the Advancement of Socio-Economics, and has twice received National Science Foundation support for his work. His research has appeared in *Politics and Society*, the *American Sociological Review*, the *American Journal of Sociology*, *Organizational Studies*, *Socio-Economic Review*, the *Seattle University Law Review*, and *Research in the Sociology of Organizations*. He received his BA from Haverford College and his PhD in sociology from the University of Wisconsin–Madison.

Katherine Sobering is an assistant professor of sociology and faculty affiliate in women's and gender studies at the University of North Texas. She is an ethnographer who studies how inequality is produced and disrupted in the United States and Latin America. With Javier Auyero, she is the author of *The Ambivalent State* (Oxford, 2019). Her work has also been published in *Work and Occupations*, *Qualitative Sociology*, and other academic journals. She is currently writing a book on worker-recuperated businesses in Argentina.

Jason Spicer is an assistant professor of economic development and planning at the University of Toronto. He researches organizational alternatives to mainstream economic practices, with a focus on the role that politics, planning, and policy play in constraining or enabling the viability of such efforts at different spatial and operational scales. He holds a master's degree and a PhD from MIT. His research has appeared in outlets such as *Socio-Economic Review*, *Stanford Social Innovation Review*, and *Cambridge Journal of Regions, Economy, and Society*, and has been featured in the *Washington Post*, *PBS NewsHour*, and *Foreign Policy*.

Carla Young earned her PhD in sociology at the University of Illinois at Chicago and is a researcher at the Institute for Ecological Economy Research in Berlin. She studies how people create organizations and technologies that facilitate more equitable and sustainable social and economic relations. She engages with organization theory, economic sociology, science and technology studies, and media studies. She also holds a master's degree in sociology and technology studies from Technische Universität Berlin.

Asma Zafar is an assistant professor of business strategy at Brock University in Canada. She earned a PhD in business administration at the University of Alberta, specializing in strategic management and organization. Her research looks at the interplay between institutional pressures and organizational responses to such pressures. Her work has been published in the *Journal of Business Ethics*, *Research in the Sociology of Organizations*, and other outlets.

FOREWORD: RESEARCH IN THE SOCIOLOGY OF ORGANIZATIONS

Research in the Sociology of Organizations (RSO) publishes cutting-edge empirical research and theoretical papers that seek to enhance our understanding of organizations and organizing as pervasive and fundamental aspects of society and economy. We seek provocative papers that push the frontiers of current conversations, that help to revive old ones, or that incubate and develop new perspectives. Given its successes in this regard, RSO has become an impactful and indispensable fount of knowledge for scholars interested in organizational phenomena and theories. RSO is indexed and ranks highly in Scopus/SCImago as well as in the Academic Journal Guide published by the Chartered Association of Business Schools.

As one of the most vibrant areas in the social sciences, the sociology of organizations engages a plurality of empirical and theoretical approaches to enhance our understanding of the varied imperatives and challenges that these organizations and their organizers face. Of course, there is a diversity of formal and informal organizations – from for-profit entities to non-profits, state and public agencies, social enterprises, communal forms of organizing, non-governmental associations, trade associations, publicly traded, family owned and managed, private firms – the list goes on! Organizations, moreover, can vary dramatically in size from small entrepreneurial ventures to large multinational conglomerates to international governing bodies such as the United Nations.

Empirical topics addressed by *Research in the Sociology of Organizations* include: the formation, survival, and growth or organizations; collaboration and competition between organizations; the accumulation and management of resources and legitimacy; and how organizations or organizing efforts cope with a multitude of internal and external challenges and pressures. Particular interest is growing in the complexities of contemporary organizations as they cope with changing social expectations and as they seek to address societal problems related to corporate social responsibility, inequality, corruption and wrongdoing, and the challenge of new technologies. As a result, levels of analysis reach from the individual, to the organization, industry, community, and field, and even the nation-state or world society. Much research is multilevel and embraces both qualitative and quantitative forms of data.

Diverse theory is employed or constructed to enhance our understanding of these topics. While anchored in the discipline of sociology and the field of management, *Research in the Sociology of Organizations* also welcomes theoretical engagement that draws on other disciplinary conversations – such as those in political science or economics, as well as work from diverse philosophical traditions. RSO scholarship has helped push forward a plethora of theoretical

conversations on institutions and institutional change, networks, practice, culture, power, inequality, social movements, categories, routines, organization design and change, configurational dynamics, and many other topics.

Each volume of *Research in the Sociology of Organizations* tends to be thematically focused on a particular empirical phenomenon (e.g., creative industries, multinational corporations, entrepreneurship) or theoretical conversation (e.g., institutional logics, actors and agency, microfoundations). The series publishes papers by junior as well as leading international scholars, and embraces diversity on all dimensions. If you are scholar interested in organizations or organizing, I hope you find *Research in the Sociology of Organizations* to be an invaluable resource as you develop your work.

Professor Michael Lounsbury
Series Editor, *Research in the Sociology of Organizations*
Canada Research Chair in Entrepreneurship & Innovation
University of Alberta

“WHAT IF” AND “IF ONLY” FUTURES BEYOND CONVENTIONAL CAPITALISM AND BUREAUCRACY: IMAGINING COLLECTIVIST AND DEMOCRATIC POSSIBILITIES FOR ORGANIZING

Katherine K. Chen and Victor Tan Chen

ABSTRACT

This volume explores an expansive array of organizational imaginaries, or understandings of organizational possibilities, with a focus on how collectivist-democratic organizations offer alternatives to conventional for-profit managerial enterprises. These include worker and consumer cooperatives and other enterprises that, to varying degrees, (1) emphasize social values over profit; (2) are owned not by shareholders but by workers, consumers, or other stakeholders; (3) employ democratic forms of managing their operations; and (4) have social ties to the organization based on moral and emotional commitments. The contributors to this volume examine how these enterprises generate solidarity among members, network with other organizations and communities, contend with market pressures, and enhance their larger organizational ecosystems. In this introductory paper, the authors put forward an inclusive organizational typology whose continuums account for four key sources of variation – values, ownership, management, and social relations – and argue that enterprises fall between these two poles of the collectivist-democratic organization and the for-profit managerial enterprise. Drawing from this volume's empirical studies,

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the authors situate these market actors within fields of competition and contestation shaped not just by state action and legal frameworks, but also by the presence or absence of social movements, labor unions, and meta-organizations. This typology challenges conventional conceptualizations of for-profit managerial enterprises as ideals or norms, reconnects past models of organizing among marginalized communities with contemporary and future possibilities, and offers activists and entrepreneurs a sense of the wide range of possibilities for building enterprises that differ from dominant models.

Keywords: Collectivist-democratic organizations; cooperatives; alternative organizations; participatory democracy; employee ownership; social enterprise

Science-fiction stories explore futures through three conceits: they speculate "what if" possibilities, envision "if only" utopias, and warn about looming "if this goes on" dystopias (Asimov, 1962). As seen in the works of pathbreaking writers like the Afrofuturist Octavia Butler and feminists Margaret Atwood and Joanna Russ, such narratives can conjure up visions of other possible worlds even as they critically examine issues of inequality, racism, xenophobia, and environmental degradation relevant to the present day. For their part, social scientists specialize in this latter kind of critique. Studies of organizations, for example, focus on how the daily activities of schools, governmental agencies, corporations, and other organizations maintain existing political and economic arrangements. Unlike science-fiction writers, however, social scientists usually stop short of exploring serious alternatives to these systems (Mische, 2009).

This tendency narrows people's views of organizations, fettering their organizational imaginations in subtle but pernicious ways. By studying organizations that attempt to disrupt or bypass conventional values and practices, scholars can help communities think through how they might move beyond seemingly intractable status quos. After all, a key insight of the sociology of organizations is that through their goals and practices, organizations fundamentally shape people's lives. Most organizational practices underserve particular groups and justify an inequitable distribution of resources. Some organizational practices even repress and harm members, clients, and workers. If communities desire "better" futures, they need to create transformative organizations that make those futures possible.

We can therefore classify organizational forms by how they steer societies toward three possible paths: a speculative "what if" future, a utopian "if only" future, and a dystopian "if this goes on" future. Much sociological research argues that without sufficient checks, capitalism and bureaucracy, the yoked engines that drive today's markets and states, steadily pull societies down the dystopic third track. Unresponsive, byzantine bureaucracies exclude minority perspectives that, if heeded, could improve outcomes for all. Exploitative business practices decimate the environment and push growing ranks of workers into precarity. As the

consequences of these activities have grown more visible and entrenched in recent decades, even those living in ostensible democracies have become skeptical of government and business (Rainie, Keeter, & Perrin, 2019). Meanwhile, crises and social movements – most recently and dramatically, the SARS-CoV-2 pandemic and widespread protests against police brutality – expose the failings of corporate-dominated policy-making, stripped-down safety nets, and unaccountable bureaucracies. If these broken systems go on, younger generations may inherit economic and social wastelands, authoritarian and oligarchic regimes, and dwindling resources of clean air, water, food, and land.

Rather than viewing such grim futures as inevitable, some collectivities are already experimenting with alternatives. Many of these groups' members have been economically and politically marginalized by capitalist systems. Galvanized by the catastrophic consequences of underregulated markets and hollowed-out states, they establish organizations focused on ends other than profit. Frustrated with inequitable and impersonal bureaucracies, they seek more communally oriented approaches to organizing. Through these collectivist and democratic practices, they make manifest real possibilities for "what if" and "if only" futures: *What if* organizations could operate in ways that curtail inequalities? *What if* enterprises could serve the interests of stakeholders other than just the elites – through balanced and sustainable processes? *If only* our policies, politics, and markets supported more caring, diverse, and egalitarian organizations, what sorts of inclusive and communitarian experiments could flourish?

This volume examines contemporary efforts to establish and nurture what Joyce Rothschild called *collectivist-democratic organizations*. In her seminal 1979 *American Sociological Review* article and her award-winning 1986 book, *The Cooperative Workplace: Potentials and Dilemmas of Organizational Democracy and Participation* (coauthored with J. Allen Whitt), Rothschild described how a new wave of experimental schools, law collectives, newspaper collectives, food cooperatives, and free health clinics prioritized values other than bureaucratic efficiency and profit-making. Such research revealed the various hurdles, including increased scrutiny and difficulties with securing resources, that these organizations regularly confronted as they implemented egalitarian practices like decision-making by consensus, rotating responsibilities, and flexible or ad hoc rules.

Focusing mostly on one important type of collectivist-democratic organization – worker cooperatives – this volume builds on that earlier body of groundbreaking research conducted by Rothschild (who writes this volume's closing capstone) and other scholars. Drawing from data collected in Europe, Latin America, and the United States, the capstones and peer-reviewed studies collected here extend our understanding of how such organizations deal with the present-day challenges of advancing collectivist and democratic goals within capitalist economies. Using quantitative and qualitative approaches, some of the authors examine how larger ecosystems of government policies, market practices, and organizational networks shape the abilities of collectivist-democratic organizations to pursue their missions. Several of our volume's contributors also document how collectivist-democratic practices reshape their *organizational fields* – the terrain

of competition and cooperation in which organizations operate – by building what Marc Schneiberg calls "organizational infrastructures" of alternatives to the status quo.

Given its focus on collectivist-democratic enterprises, the volume delves less deeply into the workings of nonprofit organizations, voluntary associations, and social movement and activist groups. It does not include research on ephemeral or temporary organizations, such as mutual aid networks and free universities, or technologically networked organizations like incubators, platforms, and digital commons (Benkler, 2006; Scholz & Schneider, 2017). Moreover, this volume does not examine collectivist-democratic organizations in educational fields. Since schools often introduce people to representative democratic processes, they are an important venue for studying how organizations inculcate collectivist-democratic norms and skills, an area that Katherine and others are pursuing in ongoing projects. Despite these limitations, the volume offers a global collection of empirically researched, thought-provoking perspectives on both emerging and long-standing efforts to expand collectivist democracy.

Our introductory paper first describes how today's conventional organizations confront tensions that pervade their capitalist and bureaucratic structures. These are challenges, we argue, that collectivist-democratic practices can potentially address. Drawing from the research in this volume and elsewhere, we then sketch out a typology of organizations, with collectivist-democratic organizations and for-profit managerial firms anchoring ends of a continuum. This categorization scheme builds on Rothschild's earlier discussion of these two ideal types, but it focuses upon four key characteristics that we argue are decisive in describing the range of organizational possibilities between the poles of collectivist-democratic and for-profit managerial. By examining how organizations vary in their *values*, *ownership*, *management*, and *social relations*, the typology deepens scholarly understanding of these critical points of similarity and difference and provides a sense of the possibilities for constructing and managing enterprises that deviate from dominant models. By growing these sorts of alternative organizations both through bottom-up organizing and top-down policies, societies can move closer toward what Victor calls an economy of grace (V. T. Chen, 2015, 2017), a broader culture of compassion and inclusion that can help revitalize democratic possibilities and re-prioritize caring and connection. This, too, could be our future – if only we can dismantle the dysfunctional hierarchies and incentives that plague our prevailing systems.

HOW UNCHECKED BUREAUCRACY AND CAPITALISM CAN FUEL "IF THIS GOES ON" FUTURES

Contemporary societies depend upon organizations to direct and coordinate the activities of their populations. The rhythms, values, and practices of schools, workplaces, houses of worship, and other organizations structure people's everyday lives. With the spread of rationalization, bureaucracies have become the dominant organizational form adopted by for-profit firms, nonprofit organizations,

voluntary associations, and state agencies alike. Yet, as Max Weber (1905/1977) warned, bureaucracy's hierarchical relations and stultifying division of labor can deaden people's sense of purpose. Likewise, as market norms and practices are applied to areas of organizational life beyond the workplace, capitalism displaces other values and alienates those trapped within its exploitative relations. When organizations are beholden to the interests of stockholders, funders, or managers or bureaucratic standards, the resulting myopic focus on maximizing profit or efficiency can undermine the well-being of their members, workers, and clients, as well as that of the larger society.

Conventional forms of organizing and exchange also narrow society's sense of possibilities. People's experiences with organizations and markets often follow prescribed ways of how "best" to organize and connect with others. These taken-for-granted beliefs in the efficiency and efficacy of bureaucratic practices and market exchanges, in turn, shape the course of lives: where people get an education, how they make a living, when they connect with friends and family, how they contend with the end of life. When people believe that conventional organizations are the appropriate or expected form for coordinating collective efforts, they have difficulties envisioning other ways of connecting and organizing (Zucker, 1983).

Moreover, taken-for-granted bureaucratic practices and hierarchies cloak how power is embedded in organizational structures (Perrow, 1986). Such structures tend to favor already advantaged members by excluding other voices and inequitably parceling out resources like education, health care, jobs, and promotions (Tomaskovic-Devey & Avent-Holt, 2019). For example, when assessing students or evaluating prospective employees, members can prioritize values that justify the "good fit" candidate who looks and acts like those doing the hiring (Kanter, 1977). In doing so, members reproduce and reinforce inequalities relating to race (Ray, 2019), gender (Acker, 1990, 2006), socioeconomic status (Rivera, 2015), and other divisive markers of identity, rather than creating more inclusive, caring collectives (Tronto, 2013). While some organizations' members can unite across such lines to oppose discrimination and exploitation, conventional management practices can undermine this sort of cooperation by amplifying divisions (Hodson, 2001).

Furthermore, organizational practices and norms limit how much and what types of support the working class and other disadvantaged groups seek out and receive. The culture of unfettered capitalism promoted regularly in workplaces, schools, media, and elsewhere tends to glorify individual actions and uphold the value of competition over the needs of interdependent communities (V. T. Chen, 2015). When the institutions around them embrace such an ethic of extreme individualism, or meritocratic morality, people can dismiss less advantaged groups as "undeserving" and blame unequal outcomes on personal failures to make optimal market decisions or comply with bureaucratic practices (Hochschild, 2018; Jack, 2016; Silva, 2013). Instead of seeing access to adequate resources as a human right, policy-makers tend to assume that citizens can acquire such resources through skillfully executed market exchanges, with intermediary organizations teaching them how to navigate these markets as "good" consumers (K. K. Chen, 2020). And when

policy-makers apply market forces of competition to the distribution of public goods like education, organizations frequently cannot undertake their espoused missions and instead resort to decoupling and deception.[1] Meanwhile, when the state eschews responsibilities to referee and equalize outcomes, the more advantaged deploy existing arrangements to engage in rampant opportunity hoarding that deepens inequalities (Calarco, 2018; Tomaskovic-Devey & Avent-Holt, 2019).

HOW ORGANIZATIONAL IMAGINARIES INSPIRE "WHAT IF" AND "IF ONLY" POSSIBILITIES

As bureaucratic and capitalist values and practices have spread, people have continued seeking out less divisive and mercenary means of connecting, generating a range of collectivist forms. Such organizations coordinate collective efforts based on values other than profit-making and give voice to stakeholders other than investors and managers. In doing so, they prefigure desired futures, testing the viability of organizational practices that support greater equality and engagement. At the same time, they often build upon models of organizing and exchange that were more common in historical periods preceding the rise of neoliberal capitalism and rational bureaucracy (Polanyi, 1944/2001). In fact, forms of collectivist-democratic organizing were "significant, rather than aberrant" features of early American capitalism (Schneiberg, King, & Smith, 2008; see also Schneiberg, 2007), even though in the United States in particular, memories of those traditions have faded, as we will discuss.

In spite of the past prevalence of collectivist-democratic forms and their future potential, few people get the chance to experience such organizations. For-profit managerial firms dominate, and their reach has expanded into sectors like education and health care that were previously insulated from market pressures. Since organizational scholars primarily study and teach about conventional organizations, even they can be unfamiliar with alternative practices and philosophies. As a result, most people are ill-prepared to build the sorts of organizational infrastructures that can shift the status quo. Furthermore, the lack of attention to organizing possibilities also reflects a larger unawareness of the importance of organizations. When discussing modern-day inequalities, commentators (including many researchers) tend to relegate organizations to the background of their analyses, focusing on how *individuals* act, rather than how organizations' goals and practices channel people's activities toward narrow ends (K. K. Chen, 2017).

The broad scope of today's global challenges – environmental degradation, growing inequalities, uncontrolled pandemics – suggests that societies need to encourage a diversity of organizational forms beyond unresponsive, centralized bureaucracies and exploitative, capitalist enterprises. By reducing power differentials in relationships and decision-making, collectivist-democratic practices can help people develop organizations that are responsive to, and inclusive of, a wider range of stakeholders. They can also tap the local knowledge of people working

on an organization's frontlines, whose expertise can enhance decisions that in conventional bureaucracies are normally limited to managers. A wide body of research finds that when employees have greater control over work activities, both workers and their firms benefit (Blasi, Freeman, & Kruse, 2017; Bryson & Freeman, 2010; Kalleberg, 2011; see also the paper by Jonathan Preminger in this volume). Moreover, new research suggests that organizations that cultivate such practices can have broader impacts – as Marc Schneiberg finds in his paper – by making local communities more resilient against hardships.

When people own their organizations and have a real say in running them, these experiences can transform their lives. For example, in Argentina and elsewhere, workers have taken over factories, hotels, and other workplaces that otherwise would have closed. By implementing collectivist-democratic practices such as job rotation and decision-making by consensus, the members of these so-called worker-recuperated cooperatives carry out "equality projects," as Katherine Sobering calls them (see her forthcoming book and her paper in this volume). The workers she interviewed at one Buenos Aires cooperative recounted how in non-worker-owned workplaces they had routinely experienced "denials of dignity" (Hodson, 2001) – episodes of exploitation and alienation. But as Sobering shows, a cooperative's determined efforts to rewrite the narratives of the meaning of work and perform rituals to promote solidarity and commitment among members can spark collective effervescence and potential transformations, generating what we might call affirmations of dignity. At the same time, building this solidarity and commitment requires constant work. As James Mandiberg and Seon Mi Kim's paper suggests, newcomers to these organizational forms may be unclear about the responsibilities and benefits of membership, and the organization itself needs to take an active role in educating them.

These "what if" and "if only" possibilities for organizations spark the development of "imaginaries," shared schemas for understanding complex issues that encourage societies to adopt specific structures and solutions in response (Levy & Spicer, 2013). What we call *organizational imaginaries* can lead entrepreneurs and activists toward certain ways of organizing ventures and movements.[2] Today, the dominant organizational imaginary favors top-down bureaucracies and for-profit investor-owned firms, but other worlds can be imagined. Technological, cultural, legal, political, and strategic innovations and activities are constantly generating new imaginaries and reworking existing ones – for example, how the rise of platform cooperativism in recent years has been enabled by growing capacities for larger-scale, coordinated exchanges (for an overview, see Vallas & Schor, 2020). And as Joyce Rothschild notes in the interview that concludes this volume, collectivist and democratic approaches to organizing have proliferated throughout civil society – a development she had not anticipated when she started her research. Today's activists and entrepreneurs are spreading these practices and sensibilities as they build networks and coalitions across national borders. That said, in considering the future of collectivist organizing, it is also critical to reconnect with its past – the visions outlined, lessons learned, and strategies proposed by previous generations of activists and scholars.

HOW ORGANIZATIONAL STUDIES HAVE NEGLECTED ALTERNATIVE IMAGINARIES

In the 1960s and 1970s, a wave of organizations emerged to counter the alienating aspects of bureaucratic institutions and capitalism. Scholars embarked on seminal research into a wide variety of collectivist-democratic organizations, ranging from communes (Kanter, 1972), to feminist groups (Sirianni, 1984), to alternative or free schools (Swidler, 1979), to health clinics (Kleinman, 1996), to worker cooperatives (Rothschild & Whitt, 1986). Then, this line of research dwindled as many of these organizations closed. Some flourished, most notably the Mondragon worker cooperatives in Spain (Cheney, 1999; Whyte & Whyte, 1988), but for the most part, unless collectivist-democratic organizations stayed small and homogeneous, their members struggled to resist dominant organizing practices and compete in capitalist economies (Rothschild & Whitt, 1986). Such difficulties with scaling upwards while maintaining form also vexed collectivist organizing efforts in earlier periods (J. Spicer, 2018).

In more recent years, new generations of collectivist-democratic initiatives have emerged. These have benefited not only from technological advances, but also from deepening disenchantment with the destabilizing and extractive practices of global capitalism. Like their predecessors, these initiatives range widely in their activities and locales, but they share a set of values around nurturing personal relationships, questioning economic orthodoxy, and challenging other aspects of conventional bureaucracies and markets. Besides worker cooperatives (Kokkinidis, 2015), they include free and open-source software projects like Linux (K. K. Chen & O'Mahony, 2009), sharing economies (Schor et al., 2015), alternative currency networks (North, 2007), online communities around products (Husemann, Ladstaetter, & Luedicke, 2015; Ladstaetter & Luedicke, 2013), giving circles (Eikenberry, 2009), global student activism (Wimberley, Katz, & Mason, 2015), free universities (Coté, Day, & de Peuter, 2006), inequality-fighting campaigns like Occupy (Milkman, Lewis, & Luce, 2013), and artistic communities like Burning Man (K. K. Chen, 2009) and the Amber Collective (Vail & Hollands, 2012, 2013). In governance, democratic deliberation (Baiocchi & Ganuza, 2016) and participatory budgeting (Su, 2018) have taken root in Brazil and parts of New York City, among other places.

Around the world, collectives are experimenting with more egalitarian approaches to relating with other persons, organizations, and economic systems. They are testing the potential, as well as the limits, of collectivist-democratic practices. In areas where the state and capitalist markets have failed to adequately serve the needs of residents, so-called solidarity economies have taken root. These include campaigns like Cooperation Jackson in Jackson, Mississippi (Akuno & Nangwaya, 2017), where residents have set up a system of interlinked worker cooperatives that prioritizes democratic rights, economic justice, and self-determination (Cooperation Jackson, n.d.). While such alternatives often arise to fill gaps in markets, interconnected ecosystems of organizations have also thrived with explicit and robust state support, as the paper by Paola Ometto, Asma Zafar, and Leanne Hedberg shows through a case study of the Brazilian solidarity economy movement.