Home Sweet Home? The multiple logics of homeownership and the politics of conflict in a hybrid organization

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Dissertation

HOME SWEET HOME? THE MULTIPLE LOGICS OF HOMEOWNERSHIP
AND THE POLITICS OF CONFLICT IN A HYBRID ORGANIZATION

by

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HOME SWEET HOME? THE MULTIPLE LOGICS OF HOMEOWNERSHIP AND THE POLITICS OF CONFLICT IN A HYBRID ORGANIZATION

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ABSTRACT

This dissertation explains the existence, sources, and variability of intra-organizational conflict in a hybrid organization. It assesses the usefulness of "structural" and "cultural" explanations of conflict and ultimately advances an alternative explanation for the presence of and variability in conflict in a hybrid organization. Homeowners' associations are used as a case for understanding the development of multiple institutional logics and the relationship between institutional pluralism and complexity and the presence of and variability in conflict in a hybrid organization. Drawing from quantitative and qualitative research conducted on homeowners' associations in the Greater-Boston area, including 250 surveys and 56 in-depth interviews with board members of homeowners' associations, I show how the American history and ideology of homeownership has generated two multiple, permanent, and functionally contradictory institutional logics— one based on the market and the other based on the community— in homeowners' associations. Using institutional theory and the concepts of institutional work and ambidexterity, I argue that organizational actor responses to the presence of
institutional pluralism and complexity, as evidenced in their perceptions and practices, determine whether a hybrid organization is subject to more or less conflict.

My findings lead to three general conclusions. First, many homeowners' associations experience significant conflict. Second, structural and cultural explanations of conflict only partially explain the presence of conflict in homeowners' associations. They do not explain the variability of conflict in homeowners' associations. Third, and most significantly, the micro-actions of organizational actors matter in situations of institutional pluralism and complexity. I propose that organizational actors' responses to institutional pluralism and complexity explain variability in conflict; organizational actors either "do" or "do not" respond to institutional pluralism and complexity. Organizational actors who "do not" respond to institutional pluralism and complexity by eliminating and compartmentalizing logics. They perceive multiplicity as novel and problematic and enact disruptive practices to contest and separate logics. This results in more conflict. Organizational actors who "do" respond to institutional pluralism and complexity ambidextrously. They perceive multiplicity as routine, and even beneficial, and enact practices to maintain multiple institutional logics via context-specific and purposeful practices including adjustment, improvisation, and switching. This results in less conflict.
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CHAPTER ONE: INTRODUCTION

Over Boards: Condo Committees Rule in a Crazy Game of Power and Money
- *The Boston Globe* Headline (June 12, 2005)

Buyer Beware Of the Association; Convenience May Come at a Cost
- *The Washington Post* Headline (October 20, 2007)

Homeowner Associations in Disrepute
- *Arizona Daily Star* Headline (September 2, 2008)

Corruption Investigation: Agents Pursue Might Be Arrested
- *Las Vegas Sun* Headline (March 30, 2012)

Man Stabbed in Dispute with HOA President
- *UT San Diego* Headline (September 6, 2013)

Nevada HOA Board Called ‘Too Conflicted’ to Function Properly

*Introduction*

An abundance of newspaper headlines suggest that homeowners’ associations (also, community associations, common interest associations, condominium owners associations, cooperative ownership associations, collective housing associations) are fraught with conflict. The allegations of misdoing and mismanagement range from the mild (e.g., “Owner Told No Christmas Lights by Homeowners’ Association”) to the brazen (e.g., “HOA Uses Satellites to Spot Violations”) to the outrageous (e.g., “HOA: Upscale Condo Owners to Use One Door, Renters to Use the POOR DOOR”). Yet, an independent national survey of homeowners’ association residents conducted in February 2012 by Ibope Zogby International and sponsored by the Foundation for Community
Association Research claims that 70% of American homeowners polled would rate the overall experience of living in a community association as positive; further, that 44% absolutely and 44% for the most part thought that the members of their elected governing board strove to serve the best interests of the community as a whole.\(^1\) The conflicting accounts of life in homeowners\(\text{"}\)associations raise three questions: 1) How common is intra-organizational conflict in homeowners\(\text{"}\)associations; 2) What are the sources of intra-organizational conflict in homeowners\(\text{"}\)associations; and 3) What makes some homeowners\(\text{"}\)associations more and less conflicted?

These questions are complicated, loaded, and not easily answered. They are also very important: the Community Associations Institute estimates that homeowners\(\text{"}\)associations governed 25.9 million American homes and 63.4 million residents in 2012.\(^2\) Concomitant with the steady increases in the number of communities, housing units, and residents is the increase in the number of homeowners\(\text{"}\)association managers and homeowners\(\text{"}\)association management companies. In 2012, the Community Associations Institute estimated there were over 55,000 homeowners\(\text{"}\)association managers and 8,000 homeowners\(\text{"}\)association management companies. The dual rise in homeowners\(\text{"}\)associations and management companies is in no doubt linked to the governance issues inherent in homeowners\(\text{"}\)associations. According to the same source, more than 1.65

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\(^1\) The findings from this survey, in addition to similar surveys conducted in 2005, 2007, and 2009 with comparable findings, were based on telephone interviews with random, nationally representative samples of adults residing in homeowners\(\text{"}\)associations, condominiums, cooperatives, and other planned communities. A summary of the results of these surveys may be found on the Community Associations Institute Website: (http://www.caionline.org/info/research/Documents/national_homeowner_research.pdf).

\(^2\) The United States Census historically has not and currently does not collect information on homeowners\(\text{"}\)associations. The Community Associations Institute (CAI) is the leading source of data on these communities. They report that the number of homeowners\(\text{"}\)association communities has steadily increased for the last thirty years and is expected to continue to rise in the future.
million Americans serve on a homeowners' association board, with close to 600,000 participating as committee members. These "volunteers" (homeowners' association board members are usually elected or appointed to the position by their community) are tasked with developing, managing, and protecting the value of the homes and the community. How board members choose to preserve and enhance the homeowners' association's value, however, is highly variable, largely unregulated, and usually subjective. Their practices are dependent upon personal perceptions about the role of the organization and the purpose of homeownership—it really is no wonder there are so many media reports of conflict.

The conflict present in homeowners' associations may be symptomatic of the conflict experienced in other types of organizations. Indeed, conflict is a familiar theme in much of organization theory, and some theorists, such as Georg Simmel, view conflict as both natural and necessary, similar to the need for stability and order. He states: "A certain amount of discord, inner divergence and outer controversy, is organically tied up with very elements that ultimately hold the group together; it cannot be separated from the unity of the sociological structure" (Simmel, 1908/1955: 17-18). Conflict is seen as an organic and important component of human interaction. When two or more social entities (i.e., individuals, groups, organizations, nations, etc.) come in contact with one another in attaining their objectives, the relationship may become incompatible or inconsistent. The relationship among such entities may become inconsistent when two or more of them desire a similar resource when it is in short supply; have partially exclusive behavioral preferences regarding their joint action; or have different attitudes, values,
beliefs, and skills (Rahim, 2001: 1). From this perspective, conflict may transpire in every type of social organizational unit whether that is a family, a planning committee, a school board, a non-profit organization, a corporation, or a homeowners association.

Though naturally occurring and to be expected, the scope, scale, and intensity of conflict in organizations and its sources varies and an abundance of literature suggests that it can have detrimental consequences for the functioning of the organization and its members. Despite this, there is very little research (or much less than would be expected) which identifies the antecedent sources or determinants of conflict in any type of organization, much less organizations like homeowners associations. Homeowners associations represent a hybrid form of organization; they provide services like the public sector, are incorporated as non-profit organizations, and have an organizational structure and mission very similar to for-profit corporations. As such, these organizations occupy a fuzzy space at the intersection of the three main institutional sectors of society. McKenzie (2003: 218-219) summarizes how homeowners associations are at once a part of society, the state, and the market: "As a nonprofit corporation that depends upon volunteers to serve as directors and officers and that aims to create a sense of community, the community association functions like a civil society institution. To the extent that the association is carrying out what would otherwise be local government functions, it is akin to an extension of the state. And an association’s duty to concern itself with property values is a market-based incentive."
What more is the research that does exist suggests that organizational and board structures would best predict the occurrence of intra-organizational conflict (Wall and Callister, 1995; Pfeffer, 1972; Cornforth, 2001; Brown, 2005; Grissom, 2010; Kochan, Huber, and Cummings, 1975) while scholarship in the area of hybrid organizations would intimate the importance of understanding its culture, particularly the nature and influence of its hybridity on its organizational vision, or set of expected goals and preferred modes of action. This scholarship suggests that hybrid organizations exist in institutionally pluralistic environments (Kraatz and Block, 2008) with access to multiple institutional logics that may be subject to different cultural and material characteristics and which may prescribe two or more different, and potentially conflicting, sets of expected goals and modes of action (Thornton, 2004; Haveman and Rao, 2006; Lounsbury, 2007; Ruef and Patterson, 2009; Battilana and Dorado, 2010). From this perspective, the occurrence of intra-organizational conflict would be best explained by the presence of multiple institutional logics.

Given the presumption that there is variation in the amount of intra-organizational conflict in homeowners' associations, is it then best explained by the structural attributes of the board and the organization or the congruity of its organizational vision? And, if it is the congruity of its organizational vision, how do the organizational actors on the ground, those homeowners who volunteer or who are elected to serve on the homeowners' association board, factor in? How do their beliefs about homeownership and their perceptions and practices about how to preserve and enhance the value of
homeowners' associations create the potential for both more and less intra-organizational conflict in homeowners' associations?

Drawing on an original survey of homeowners' association board members, interviews with homeowners' association board members and professionals, observations, and textual data, this dissertation seeks to answer the aforementioned questions. I use sociological studies of intra-organizational conflict, institutional theory, and literature on homeownership to uncover how homeowners' associations' hybrid organizational form and culturally embedded meanings of homeownership contribute to the development of two logics of homeownership. These logics of homeownership frame organizational actor's understanding of homeowners' associations and provide an organizational environment ripe for the development of intra-organizational conflict. Unlike the structural and cultural explanations of conflict, however, I will argue that it is organizations, in particular organizational actor's, responses to these logics, as evidenced in their perceptions and practices, rather than just organizational attributes or the mere presence of multiple logics, which ultimately determines whether homeowners' associations experience more or less intra-organizational conflict. This research broadens and deepens our understandings of intra-organizational conflict and homeownership and makes significant contributions to the sociological literature on institutional logics and hybrid organizations.

This chapter establishes the framework for this dissertation. First, I will contextualize homeowners' associations by defining them as an organization, discussing their organizational form, and examining how the nature of ownership in the organization
brings about the potential for organizational conflict. I will also establish them as a case worthy of study. Second, I will briefly review two existing explanations for intra-organizational conflict in homeowners' associations. This section will differentiate the structural explanation of conflict and the cultural explanation of conflict and discuss the theoretical underpinnings and review the extant literature of each explanation. Third, I will position my research alongside the structural and cultural explanations of conflict and establish my argument for why some homeowners' associations are more and less conflicted than others. In this section I will draw upon recent scholarship in institutional theory and the concepts of institutional work and institutional ambidexterity to offer a third explanation of conflict. Finally, I will provide an overview of the methodology of my research and outline the remaining chapters of this dissertation.

The Organization of Homeowners’ Associations

Definition and Purpose

A homeowners' association is an organization of homeowners of a particular housing subdivision, planned housing community, or condominium community. It is a formal legal entity, originally created by real estate developers, which has the authority to make decisions, provide services, regulate activities, levy assessments, enforce rules, and impose fines. The purpose of the organization is to preserve, maintain, and enhance the value and desirability of their homes and property. Membership in the organization is mandatory for all property owners and requires the payment of monthly or annual fees which are used to manage and maintain the property. The homeowners' association is

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3 Figure 1-1 is a prototypical introduction to the Covenants, Conditions, and Restrictions (CC&Rs) of a homeowners' association. It establishes the legal character and purpose of the organization.
governed by a board of directors which is comprised of homeowners who either volunteer or are elected and whom manage all of the association’s business and community affairs. Board members meet on a regular basis to discuss community issues, maintenance projects, financial planning, and association rules. Homeowners’ associations are highly variable in their activities, they may do all or some of the following: levy and collect fees, fines, and assessments; maintain the property and landscaping; maintain recreational and common facilities; provide space for events and community and neighborhood functions; provide security; arrange for street maintenance; and enforce deed restrictions including, but not limited to, exterior and interior home maintenance, exterior and interior home décor, number and type of pets, noise, commercial use of properties, age requirements of residents, parking, storage of personal belongings like bikes, boats, and cars, use of the pool, exercise room, and other common amenities, and control of trash and blight. Though the type of deed restrictions and degree of stringency with the enforcement of deed restrictions varies from board to board and association to association the goal of such restrictions is to preserve the value and desirability of the property for all current residents and potential future residents (i.e., new homebuyers).
The undersigned hereby certify that they are the President and Secretary, respectively of the association, *Home Sweet Home Homeowners Association*, and are authorized by the Board of Directors to execute this restated Declaration.

The original Declaration created a planned development subdivision administered by the Association named above, for subdivisions and properties described herein.

WHEREAS, the Association has heretofore been incorporated under the laws of the State of Massachusetts as a non-profit mutual benefit corporation, *Home Sweet Home Homeowners Association* for the purposes of exercising the functions hereinafter described; and,

WHEREAS, Covenants, Conditions, Restrictions, reservations, servitudes, easements and liens which affect the subject properties have heretofore been recorded; and,

WHEREAS, the membership has tendered the requisite approval from not less than seventy-five percent (75 %) of the members to amend and restate the previously recorded Declarations of Covenants, Conditions and Restrictions; and,

WHEREAS, this Corporation hereby establishes these Restated Covenants, Conditions and Restrictions for the benefit of the Owners of all Lots at 123-456 Home Sweet Home Lane.

NOW, THEREFORE, this Association hereby declares that all of the properties described above shall be held, sold and conveyed subject to the following easements, restrictions, covenants and conditions, *which are for the express purpose of protecting the value and desirability of*, and which shall run with the real property and be binding on all parties having any right, title or interest in the defined properties or any part thereof, their heirs, successors and assigns, and shall inure to the benefit of each Owner thereof.

*Names and location changed to preserve confidentiality

**Emphasis added by author*
Organizational Form

Homeowners’ associations represent a hybrid form of organization, or an organization that mixes elements, value systems, and action logics of various sectors of society (Karré, 2010). They are often legally incorporated as not-for-profit organizations, yet have an organizational structure and management style modeled after American business corporations (the shareholders are the homeowners), yet are geographically based around a common land area and provide services like public governments. They occupy a fuzzy and porous space at the intersection of the three main institutional sectors of society (Figure 1-2 depicts the institutional location of homeowners’ associations). As such, they act in ways that are characteristic of each of the three sectors of society. McKenzie (2003) further comments on their tendency to draw upon the incentives and characteristics multiple sectors: Owners who serve as board members are influenced by market incentives when they contemplate using association funds in ways that advance their economic interests. They are at least quasi-state actors when they administer what would otherwise be municipal services and enforce rules. Further when board members see themselves as volunteers donating considerable time to their community to make it a better place to live, they are thinking like civil society actors (219).
Law, public policy, and political science scholars caution, however, that such an organizational form straddles the neat political distinction between public and private life and may cause homeowners’ associations to act as “residential private governments” (McKenzie, 1994). In such a situation, altruistic and materialistic motives [become] intertwined because of the nature of common property ownership (McKenzie, 1994: 183). Indeed, with the duty to govern the community to protect the value and desirability of homeowners’ associations’ financial and community assets, homeowners’ associations
take on a position of power ultimately curbing individual freedoms and creating the conditions for incompatible or inconsistent objectives and partially exclusive behavioral preferences regarding the business of the organization and the nature of individual property ownership. Their hybrid organizational form thus primes the organization to deal in multiple dualities: private and public, individual and communal, and economic and social. These organizations expand the range of opportunity for a group of people to join with others to live together in a neighborhood community grounded in common concerns, values, and interests; however, at the same time it restricts individual freedoms, emphasizes uniformity, and may prefer business and financial objectives rather than community concerns. To be operationally functional, homeowners' associations must strike a balance between its distinct organizational purposes, objectives, and codes of action and learn to act democratically in meeting the interests of all of its members.

Nature of Ownership

Political scientists Barton and Silverman (1994) argue that homeowners' associations and other common interest developments are doomed to fail because of the nature of ownership in the organization. They argue that the private property character of common interest developments predominates and obscures their public role and functions. Their case and international comparison studies suggest that the complex combination of individual and common ownership negatively influences issues of governance and the quality of private and public life in homeowners' associations, and that residents of common interest developments cannot truly engage in democratic decision-making. Essentially, common property ownership makes residents financially
and otherwise interdependent, yet residents will use their property rights and their own economic self-interests against one another. One neighbor’s right to freedom from certain land use necessarily interferes with another’s freedom to use the property as desired. They conclude that the complex interplay of the private and public obscures the role of community and creates a “me” (the individual homeowner) versus “them” (the governing board) mentality.

Martirossian (2001) echoes this sentiment, instead finding an “us” (the governing board) versus “them” (the larger community) relationship. Her social-psychological research on the decision-making process of communities reveals that “smart people sometimes make bad decisions,” particularly in common interest communities like homeowners’ associations where board members “often have no doubts about the inherent morality of their decisions; and hence, [are] rather unconcerned about possible moral or ethical consequences imposed on the ‘crazies’ and ‘troublemakers’ and are prone to ‘mistake a sense of cohesion and peace of the board for a sense of well-being for the entire community’ (36-41). She finds that community association boards have the “natural” inclination to make decisions based on their own best interests; decisions which can be to the detriment of the group. She blames this largely on the psychological phenomenon of group think and identifies community association boards as a prime location for its occurrence because of the nature of ownership in and the governance structure of these organizations.

The tension between the governing board and the larger homeowners’ association community that both Barton and Silverman (1994) and Martirossian (2001) insinuate
signal the importance of understanding the nature of homeownership in shared living environments. Homeowners' associations are situated against the backdrop of the American ideology of homeownership and the organizational actors that populate homeowners' associations (board members and non-board members) are culturally embedded within it. The ideology frames organizational actors' understandings of homeownership and provides them with symbolic structures to understand and construct their environments. It imbues homeowners' associations with meaning and purpose. The problem that homeowners' associations face is that this ideology often frames property and homeownership as a private and singular experience; it does not consider public shared ownership structures, making the organization, its democracy and its governance, problematic. The organization must adapt its structure and culture to meet the multiplicity of demands caused by its private and public interests.

**Homeowners’ Associations as a Case**

Homeowners' associations represent an ideal case for the analysis of intra-organizational conflict in hybrid organizations for at least three reasons. First, while the legal, economic, and organizational form and status of homeowners' associations is unique, it is not altogether abnormal. Many other types of organizations, such as schools, hospitals, public utility companies, and social enterprises, merge the public and the private and behave in ways inconsistent with just one sector of society. Second, it is an organization within a field of organizations that is grossly understudied. Despite the

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4 The American ideology of homeownership refers to the pervasive belief, communicated via government programs and policies and American culture, that homeownership matters and that it confers both economic and social benefits to the individual.
growing number and types of hybrid organizations, we still know surprisingly little about the effects of hybridity on organizations. This is likely due to the relatively narrow and dichotomous perspective that pervades the study of organizations. This perspective sees organizations as either part of the market, the state, or of society, but not simultaneously of two or all of them. Homeowners' associations clearly exist at the intersections of the three institutional sectors of society and are a good starting point to understand the effects of hybridity on organizational functioning. And third, it is an organization that is exponentially increasing in both number and influence and the rampant reports of conflict in the media suggest that there is something important to be learned about the structure and culture of these organizations and the people that populate them.

Conflict in Organizations

Organizations are widely acknowledged to be the site of much conflict and contestation. And although conflict is a fundamental fact of life within organizations, a good deal of research identifies a wide variation in the kind as well as the intensity of conflict in organizations. This research notes the importance of understanding the antecedent sources of conflict in organizations. Scholarship in this area, however, is divided between two perspectives; what I will call the "structural" perspective and the "cultural" perspective. These two perspectives differ on how they explain the occurrence of intra-organizational conflict. The structural perspective suggests that organizational and board structures best predict the occurrence of intra-organizational conflict while the cultural perspective suggests the congruity of organizational vision (via perceptions and practices) best predicts the occurrence of intra-organizational conflict. The following
sections provide an overview and review of the extant literature for each of these perspectives.

**Definition of Conflict**

Conflict is generally defined as a process in which “one party perceives that its interests are being opposed or negatively affected by another party” (Wall and Callister, 1995: 517) and a conflict situation is generally defined as a situation in which: 1) there are sets of individuals exhibiting some level of organization; 2) there is some level of interaction among group members; 3) there are different levels of positions to be occupied by group members; and 4) there is a scarcity of needed or desired resources and a general dissatisfaction among group members about how these resources are being distributed (Dahrendorf, 1958).\(^5\) Conflict occurs when the relationship between two or more social entities (i.e., individuals, groups, organizations, etc.), who come in contact with one another in attaining their objectives, becomes incompatible or inconsistent. This happens when those social entities desire a scarce resource, have partially exclusive behavioral preferences regarding joint action, or have different attitudes, values, beliefs, and skills. It is manifested in social-behavioral interactions marked by tension, frustration, annoyance, interference, and rivalry (Rahim, 2001).

**Structural Explanations of Conflict**

In keeping with this fairly broad definition, early research on organizational conflict proposed many different causes of conflict and contestation in organizations including differences in individual personalities, values, goals, and interests and

\(^5\) There are many definitions of conflict; none are universally agreed upon.
differences in cultures, values, goals, interests, and opinions about the proper allocation of organizational resources (Clark, 1988; Pfeffer, 1981). Seeking to bring order to the breadth and complexity of this research, analysts identified three major domains of organizational conflict: relationship-based, task-based, and process-based (Coser, 1956; Guetkow and Gyr, 1954; Jehn, 1992, 1995, 1997; Pinkley, 1990). Relationship-based conflicts focus on interpersonal tensions, usually sparked when two people have incompatible values, perceptions, or expectations. These conflicts are usually emotionally driven and relate more to personality differences than disagreements about organizational tasks. Task-based conflicts focus on which substantive tasks should be pursued. This type of conflict is often cognitive and centers on an analysis of what organizational tasks should and should not be done. Finally, process-based conflicts focus on disagreements about how selected organizational tasks should be accomplished. Although organizational members agree about which tasks to perform, they do not agree about the procedures or methods to use to accomplish the task. For a time, research in the field focused almost exclusively on type-casting conflict and discovering the positive or negative effects of the various kinds of conflict. The bulk of scholarship produced was meant to suggest either the function or dysfunction of organizational conflict. Jehn (1992, 1995, 1997), for example, found that task-based conflict can be beneficial to organizations, while relationship-based and process-based conflicts are mostly detrimental.

While straightforward and useful in many ways this three domain typology has been criticized for obscuring, conflating, and oversimplifying the true causes of conflict and moving the discussion from identification of causes to outcome treatment and
conflict management. To suggest that a conflict is relationship-based, for example, is largely to note that the conflict has become apparent through interpersonal differences. Whether this is true or not ultimately depends upon whether organizational conditions set the stage for such disagreements. For example, if one long-term member of a homeowners’ association governing board argues with a newly elected board member over whether to levy a special assessment for a new roof or a new boiler, which matters more: whether this incident is classified as one of those three domains of conflict (namely interpersonal or task) or whether the conflict was caused by underlying organizational attributes related to the complexity of the organizational environment or the composition of the board? Hearn and Anderson (2002), drawing from Merton’s (1968) propositions that (a) underlying conditions of conflict in social systems may produce manifest conflict episodes or remain latent, and (b) the behavioral manifestation of underlying conflict (e.g., an argument over an individual’s proposed use of funds) does not necessarily redress the underlying conflict condition, suggest the latter. They argue that the truest way to rectify the discussion and truly understand conflict is to take a structural approach. This involves, in part, studying how organizational attributes, such as organization age, organization size, degree of heterogeneity, and access to resources, prime an organization for intra-organizational conflict in any form.

Structural explanations of conflict thus suggest that organizational and board attributes best predict the occurrence of conflict in organizations (Wall and Callister, 1995; Pfeffer, 1972; Cornforth, 2001; Brown, 2005; Grissom, 2010; Kochan, Huber, and Cummings, 1975). This perspective contends that organizational structures underlie all of
the perceptions and practices that take place in an organization; if there is conflict, it is because of the characteristics of the organization itself. Scholarship in this area draws from multiple strands of literature on intra-organizational conflict in private, non-profit, and public organizations and a broad body of work which assesses the relations of groups and governing boards and finds that external and internal attributes of organizations and governing boards are significantly related to organizational performance. This relationship sets the stage for conflict and contestation. Research in this field finds that intra-organizational conflict derives from external organizational attributes like organizational age, organizational size, degree of heterogeneity, and availability of resources and internal organizational attributes like size of governing board, length of board term, and degree of structural differentiation; each of which can be connected to both positive and negative organizational performance outcomes.

In the literature on private, non-profit, and public organization board governance, for example, there is a great deal of research which links structural characteristics of governing boards to organizational performance outcomes. Scholars have assessed linkages between such organizational characteristics as board size (Grissom, 2010; Eisenberg, Sundgren, and Wells, 1998; Pfeffer, 1972), board composition and structure (Coles, McWilliams, and Sen, 2001; Dalton et al., 1998; Dulewicz and Herbert, 2004; Kula, 2005; Pfeffer, 1972), board member training (Anderson, 1992), and board practices (Dulewicz and Herbert, 2004; Kula, 2005) and both positive and negative organizational performance outcomes, including intra-organizational conflict. In one recent study on the determinants of conflict on governing boards in public organizations Grissom (2010)
found that external characteristics of public school boards play a large role in predicting intra-board conflict; heterogeneous school districts were significantly more likely to experience intra-board conflict than more homogenous school districts.

In a similar study of conflict in academic departments, Hearn and Anderson (2002) found demographic factors such as faculty size, gender composition, seniority composition; disciplinary base factors such as level of consensus and codification of knowledge in the field; and organizational factors such as instructional volume, level of specialization, research funding, and faculty involvement were related to departmental conflict over faculty promotion and tenure. Conflicts over tenure and promotion votes were overall more likely in departments with larger instructional volume, departments whose disciplinary bases were soft, departments with less specialization, and departments that were larger in size. The authors concluded that understanding the structural factors that may predict conflict were important to minimizing overall negative impacts on organizational performance than other types of predictors.

In sum, structural explanations of conflict use external and internal attributes of organizations to predict organizational performance outcomes, including the occurrence of intra-organizational conflict. This perspective sees external and internal attributes of organizations as underlying all practices of the organization and as significant contributory elements of intra-organizational conflict. External organizational attributes include measures of organizational structure and the complexity of the organizational environment (including such factors as organizational age, organizational size, degree of heterogeneity, and access to resources) and internal organizational attributes include
measures of board structure and composition (including such factors as board size, length of board term, and degree of structural differentiation).

_Cultural Explanations of Conflict_

Scholarship in the area of hybrid organizations intimates the importance of studying cultural attributes of organizations, rather than structural attributes of organizations, because the nature of their organizational form may create multiple organizational visions, or sets of expected goals and preferred modes of action. This scholarship draws from institutional theory and suggests that hybrid organizations exist in "institutionally pluralistic" environments (Kraatz and Block, 2008) with access to multiple institutional logics that may be subject to different cultural and material characteristics and which may prescribe two or more different, and potentially conflicting, sets of expected goals and modes of action (Thornton, 2004; Haveman and Rao, 2006; Lounsbury, 2007; Ruef and Patterson, 2009; Battilana and Dorado, 2010). From this perspective, conflict would be likely to occur when there is evidence of institutional pluralism, or the presence of multiple institutional logics. Institutional pluralism is expected to cause conflict because it breeds different attitudes, values, beliefs, and skills and partially exclusive behavioral preferences regarding joint action.

Logics are "cultural toolkits" (Swidler, 1986) that contain different languages, values, associations, and meaning systems that social actors draw upon selectively or habitually as a situation requires. Applied to organizational life, institutional logics are cultural beliefs and rules that shape the cognitions and behaviors of social actors in organizations (Friedland and Alford, 1991; Thornton, 2004; Lounsbury, 2007). They are
socially shared, deeply held assumptions and values that form a framework for reasoning, provide criteria for legitimacy, and help organize time and space (Friedland and Alford, 1991; Thornton, 2004; Thornton and Ocasio, 2008). In practice, they shape the rules of the game (Thornton and Ocasio, 2008: 112) and produce a stream of discourse that promulgates, however unwittingly, a set of assumptions (Barley and Kunda, 1992: 363). These sets of material practices and symbolic constructions exist at the societal level and are available to organizations and individuals to elaborate within organizations and fields of organizations (Friedland and Alford, 1991: 248).

Thornton and Ocasio (2008) advance a meta-theory of the institutional logics approach by identifying five elements of the approach that provide additional clarity into the institutional logics construct.\(^6\) First, society should be understood as an inter-institutional system comprising theoretically distinct sectors of society, each with its own institutional logic. These sectors are derived from Alford and Friedland’s (1985) social theory which identified market capitalism, state bureaucracy, democracy, nuclear family, and Christian religion as the major institutions of Western society.\(^7\) Later on, and

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\(^6\) Their meta-theory is based on their reading of Friedland and Alford’s (1991) critique of the rational choice perspective which presumes that individuals act according to the universal logic of utility maximization and is best understood in contrast to this perspective. Friedland and Alford (1991: 233) critique this perspective because it fails to explain how utilities are formed. In contrast to the universalistic approach adopted by neoclassical economists, they argue that interests, identities, values and assumptions are institutionally specific and that the logic of utility maximization may be consistent with the market but not all institutions or sectors of social life.

\(^7\) Alford and Friedland (1985: 248) define the core logics associated with the major institutions of Western society as follows: The institutional logic of capitalism is accumulation and the commodification of human activity. That of the state is rationalization and the regulation of human activity by legal and bureaucratic hierarchies. That of democracy is participation and the extension of popular control over human activity. That of the family is community and the motivation of human activity by unconditional loyalty to its members and their reproductive needs. That of religion, or science for that matter, is truth, whether mundane or transcendent, and the symbolic construction of reality within which all human activity takes place.
in less contextually specific terms, scholars identified seven social institutions—family, the community, religion, the state, the market, the professions, and the corporation—whereby individuals and organizations order their values, beliefs, identities, and rationales for action (DiMaggio and Powell, 1983; Scott and Meyer, 1983; Friedland and Alford, 1991; Thornton, 2004; Thornton, Ocasio, and Lounsbury, 2012). Each major institution essentially represents a different belief system or worldview, an encompassing way of thinking about one’s environment that links purpose and process, ends and means, and that helps interpret and assign meaning to behavior. It is often at the sector, or institutional or field, level that institutional orders, logics, or rationalities are elaborated.

A consequence of the inter-institutional system is “institutional pluralism” (Kraatz and Block, 2008), or the elaboration of multiple rationalities or logics. Institutional pluralism creates the space for agency. Agency, in particular “embedded agency,” is the second, and arguably most important, element of Thornton and Ocasio’s meta-theory. Dominant logics enable and constrain activity and establish core principles for organizing activities and channeling interests, thus social action is culturally embedded in institutional logics. For example, Thornton and Ocasio (1999), in their study of executive succession in the publishing industry, describe how, over time, the criteria for selecting publishing firm executives shifted from a professional logic to market logic.

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9 Table 1-1 provides an overview of Thornton, Ocasio, and Lounsbury’s (2012) Revised Inter-institutional System Ideal Types.
10 Although embedded agency is typically viewed as a source of institutional constraint (Holm, 1995; Seo and Creed, 2002), it can also enable action and allow for significant change (Thornton and Ocasio, 1999; Thornton, 2002, 2004).
Table 1-1: Thornton, Ocasio, and Lounsbury’s (2012) Revised Inter-institutional System Ideal Types

<table>
<thead>
<tr>
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<th>Institutional Orders</th>
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<tbody>
<tr>
<td></td>
<td>Family</td>
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<tr>
<td><strong>Root metaphor</strong></td>
<td>Family as firm</td>
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<tr>
<td><strong>Sources of legitimacy</strong></td>
<td>Unconditional loyalty</td>
</tr>
<tr>
<td><strong>Sources of authority</strong></td>
<td>Patriarchal domination</td>
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<tr>
<td><strong>Sources of identity</strong></td>
<td>Family reputation</td>
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<tr>
<td><strong>Basis of norms</strong></td>
<td>Membership in household</td>
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<tr>
<td><strong>Basis of attention</strong></td>
<td>Status in household</td>
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<tr>
<td><strong>Basis of strategy</strong></td>
<td>Increase family honor</td>
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<tr>
<td><strong>Informal control mechanisms</strong></td>
<td>Family politics</td>
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<tr>
<td><strong>Economic system</strong></td>
<td>Family capitalism</td>
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</tbody>
</table>
Table 1-1: Thornton, Ocasio, and Lounsbury's (2012) Revised Inter-institutional System Ideal Types (continued)

<table>
<thead>
<tr>
<th>Institutional Orders</th>
<th>State</th>
<th>Market</th>
<th>Profession</th>
<th>Corporation</th>
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</thead>
<tbody>
<tr>
<td><strong>Root metaphor</strong></td>
<td>State as redistribution</td>
<td>Transaction</td>
<td>Profession as relational network</td>
<td>Corporation as hierarchy</td>
</tr>
<tr>
<td><strong>Sources of legitimacy</strong></td>
<td>Democratic participation</td>
<td>Share price</td>
<td>Personal expertise</td>
<td>Market position of firm</td>
</tr>
<tr>
<td><strong>Sources of authority</strong></td>
<td>Bureaucratic domination</td>
<td>Shareholder activism</td>
<td>Professional association</td>
<td>Board of directors</td>
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<td>Top management</td>
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<tr>
<td><strong>Sources of identity</strong></td>
<td>Social &amp; economic class</td>
<td>Faceless</td>
<td>Association with quality of craft</td>
<td>Bureaucratic roles</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Personal reputation</td>
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<tr>
<td><strong>Basis of norms</strong></td>
<td>Citizenship in nation</td>
<td>Self-interest</td>
<td>Membership in guild &amp; association</td>
<td>Employment in firm</td>
</tr>
<tr>
<td><strong>Basis of attention</strong></td>
<td>Status of interest group</td>
<td>Status in market</td>
<td>Status in profession</td>
<td>Status in hierarchy</td>
</tr>
<tr>
<td><strong>Basis of strategy</strong></td>
<td>Increase community good</td>
<td>Increase efficiency profit</td>
<td>Increase personal reputation</td>
<td>Increase size &amp; diversificatio n of firm</td>
</tr>
<tr>
<td><strong>Informal control mechanisms</strong></td>
<td>Backroom politics</td>
<td>Industry analysts</td>
<td>Celebrity professionals</td>
<td>Organization culture</td>
</tr>
<tr>
<td><strong>Economic system</strong></td>
<td>Welfare capitalism</td>
<td>Market capitalism</td>
<td>Personal capitalism</td>
<td>Managerial capitalism</td>
</tr>
</tbody>
</table>
because of environmental and cultural changes. The shift in dominant logics changed outcomes by 1) shaping the meaning, appropriateness, and legitimacy of various sources of power; 2) determining what issues to attend to in controlling and rewarding political behavior; and 3) deciding what answers and solutions are available and appropriate in controlling economic and political activity in organizations (Thornton and Ocasio, 1999: 806).

The third element of Thornton and Ocasio’s meta-theory is the assumption that each of the institutional orders of society has both material and cultural components. An institutional logic provides a normative framing which allocates worth or value differently and thus affects the cultural and material circumstances of individuals and groups. For example, the family is a predominantly cultural institution, nevertheless, it also has material components in that they are directly involved in the production, distribution, and consumption of goods and services (Thornton and Ocasio, 2008: 105). Similarly, the market logic emphasizes the accumulation of personal wealth and income but it also functions as a cultural mechanism by which actors achieve symbolic value. Thus, institutions have cognitive, normative, and symbolic dimensions.

Another element of the institutional logics approach is that it incorporates multiple levels of analysis. In Friedland and Alford’s (1991) formulation, logics, as shared cognitions, are relevant at both the individual and societal levels. Scholars have since broadened their relevancy to the multiple levels of society (individual,

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11 Friedland and Alford’s (1991: 242) initial formulation of the institutional logics approach presupposed the partial autonomy of individuals, organizations, and institutions and viewed individual behavior as nested within organizations and institutions.
organizational, field, and societal) and a variety of different levels of analysis including markets, industries, inter-organizational networks, and geographical communities (Thornton and Ocasio, 2008). The institutional logics perspective assumes that institutions operate at multiple levels of analysis and that individual actors are nested in higher order levels (individual, organizational, field, and societal). This element contributes to the Thornton and Ocasio’s (2008) assertion that the institutional logics approach is also a method of analysis. Researchers can measure the effects of content, meaning, and change in institutions using the institutional logics approach. The organizational field, or sector or industry, has served as the primary unit of analysis in a number of studies employing the institutional logics approach and is open to both deductive and inductive research strategies.\(^\text{12}\)

The fifth and final element of the institutional logics meta-theory is “historical contingency.” The dominant form of logic, its manifestation in an organizational form, the space it provides for agency, and its material and cultural components are all historically situated and contingent to a particular spatial and temporal setting. This element is an acknowledgement that the relative influence of the seven major institutions

\(^\text{12}\) Although the organizational field has often served as the unit of analysis (see: Bacharach and Mundell’s (1995) analysis of the educational sector, Bacharach et al.’s (1996) study of the airline industry, Haveman and Rao’s (1997) investigation of the thrift industry, Scott et al.’s (2000) focus on the healthcare industry, or Thornton and Ocasio’s (1999) study of the publishing industry), it is not the only unit of analysis available under the institutional logics framework. Further, although foundational studies have combined event history and interpretive methods into their research designs (see: Haveman and Rao, 1997, Thornton and Ocasio, 1999, or Scott et al, 2000), other research designs have similarly incorporated the institutional logics framework as a method of analysis.
identified by scholars shift over time whereas market logics currently dominate many organizational fields, religion dominated during an earlier era.13

The main function of institutional logics, then, is to define what an institution means and to provide a set of associated perceptions and practices. They establish the rules that structure cognition, guide decision-making and behavior, and focus the attention of key decision-makers on a set of issues and solutions (Marquis and Lounsbury, 2007). Scholars have shown that institutional logics shape attention strategies (Thornton and Ocasio, 1999), contractual practices with clients (Lounsbury, 2007), investment decisions (Hallen, 2008), and downsizing behaviors (Greenwood et al., 2010). These studies and others have shown the pluralistic attributes of institutional logics, going beyond the early unitary isomorphism arguments, to show the behavioral outcomes of multiple institutional logics. Institutional logics, therefore, are supra-organizational and abstract, but become observable in the concrete social relations of actors who utilize, manipulate, and reinterpret them.

The plurality of institutional logics and their availability for utilization by actors within organizations make this approach highly amenable to understanding intra-organizational conflict in hybrid organizations. This approach conceptualizes hybrid organizations as carriers of multiple institutional logics, rather than as organizations which merely operate in or combine different characteristics of more than one sector of society. Haveman and Rao (2006: 974) confirm this broader view: 'Hybrid organizations combine institutional logics that are materialized in two or more organizational forms.'

13 This element distinguishes Thornton and Ocasio (2008) from Meyer and Rowan (1977) who believed there would be a long-term trend toward market rationalization that left little room for agency.
As such, hybrid organizations arise from and are subject to the politics of contestation between institutional logics. The contestation of or conflict between the presence of multiple logics is an often unintended consequence of institutional pluralism. Friedland and Alford (1991: 256) acknowledge this outcome: “Some of the most important struggles between groups, organizations, and classes are over the appropriate relationships between institutions, and by which institutional logic different activities should be regulated and to which categories of person they apply.” This contestation results from the way in which institutional logics shape the “rules of the game” and “promulgate assumptions” about organizational vision, purpose, and behavior. As Kraatz and Block (2008: 243) note: “An organization confronting institutional pluralism plays in two or more games at the same time.” Because of this, institutional pluralism is deemed problematic; it is implicitly presumed to create intra-organizational conflict marked by fragmentation, incoherence, goal-ambiguity, and organizational instability as the contests between logics, or perceptions and practices, play out (Kraatz and Block, 2008; Stryker, 2000; Heimer, 1999).

In sum, cultural explanations of conflict use the presence of multiple institutional logics to predict the occurrence of intra-organizational conflict. This perspective views multiple logics as a “threat” (Jarzabkowski et al., 2009: 306) and characterizes pluralistic organizations as existing in “turmoil” (Hallet, 2010: 52). Multiple institutional logics promulgate incongruent organizational visions which may prescribe two or more different, and potentially conflicting, sets of expected goals and modes of action. As
such, this perspective sees intra-organizational conflict as a somewhat inevitable outcome of institutional pluralism. For conflict to lessen, a dominant logic must emerge.

In this dissertation I will assess the political dimensions of governance and conflict in homeowners’ associations by documenting the existence of conflict in homeowners’ associations and assessing the relative value of the structural and cultural explanations of conflict for explaining the variability of significant intra-organizational conflict in homeowners’ associations. I will use original survey, interview, observational, and textual data to show that homeowners’ associations, like other organizations, are indeed sites of much conflict and contestation. I will provide evidence of the relative strengths and weaknesses of both the structural and cultural explanations of conflict and offer an argument for why these existing explanations of conflict fall short of fully explaining why some homeowners’ associations are more and less conflicted. I will ultimately develop and advance a third explanation for intra-organizational conflict; this explanation attributes the variability in intra-organizational conflict to individual and organizational responses to institutional pluralism and complexity.

“Doing Logics”: The Logics of Homeownership and the Politics of Conflict

The theory and literature on the relative unavoidability and inevitability of conflict in organizations isn’t a lie: my original Homeowners’ Association Survey reports much intra-organizational conflict in homeowners’ associations (nearly half of the homeowners’ associations I surveyed reported having experienced at least one significant instance of conflict in the last 12 months). So, as predicted by the literature, homeowners’ associations, like other organizations, do experience significant intra-organizational
conflict. As to the sources of intra-organizational conflict in homeowners’ associations, my complete statistical model, which assesses the relative strength of both external and internal and \( \text{structural} \) and \( \text{cultural} \) predictors of intra-organizational conflict, reveals two particularly strong and statistically significant predictors: organization size (an external and structural predictor) and ideological homogeneity (an internal and cultural predictor). I find that homeowners’ associations of a large size and homeowners’ associations who report sharing a common vision about the purpose of a homeowners’ association are less likely to experience a significant instance of conflict when compared to those homeowners’ associations of a small size and homeowners’ associations who do not report sharing a common vision about the purpose of a homeowners’ association. Interestingly, then, I find some empirical support for both the structural and the cultural explanations of conflict. The strongest statistical predictor, however, is cultural. My measure of the presence of institutional pluralism, ideological homogeneity, is the most statistically robust determinant of intra-organizational conflict in homeowners’ associations. This measure, however, does not directly or fully measure the presence of institutional logics and does not identify what institutional logics may be present.

Through interviews with board members of homeowners’ associations and other related organizational actors I confirm the initial findings of my survey. I do indeed find that there are multiple institutional logics culturally embedded in the hybrid organizational and institutional environment of homeowners’ associations. I identify and define two logics of homeownership: the economic logic of homeownership and the social logic of homeownership. I argue that these two logics stem from the American
ideology of homeownership and prove to complicate the organizational imperative of homeowners’ associations by creating institutional pluralism and complexity. The economic logic of homeownership corresponds to the market and corporate interests of homeowners’ associations’ hybrid organizational form. This logic primes homeowners’ association board members to act in their personal best interests and to mainly concern themselves with property values and other financial performance indicators. The social logic of homeownership corresponds to the civil and public interests of homeowners’ associations’ hybrid organizational form. This logic primes homeowners’ association board members to act in the best interests of the community and to mainly concern themselves with shared values, communal governance, and other social performance indicators. Because these two logics of homeownership exist in opposition to one another, they create ideological heterogeneity, incongruous organizational visions, and prescribe different goals and modes of action, and, as my survey data strongly suggests, do have the potential to cause significant intra-organizational conflict.

But while the dual presence of the economic logic of homeownership and the social logic of homeownership may partially explain the existence of intra-organizational conflict in homeowners’ associations, it does not explain the variability in intra-organizational conflict that homeowners’ associations experience. Neither the structural nor the cultural explanations of conflict explain why some homeowners’ associations are more and less conflicted than others. I argue that the structural and cultural explanations of conflict cannot fully explain the variability of intra-organizational conflict in homeowners’ associations because they completely or almost completely ignore the role
of organizational participants and their agentic potential to both cause more and less conflict. Indeed, as explained in the previous section, the structural explanation of conflict focuses solely on structural attributes of the organization—not on the perceptions and practices of the people within it. The primary concerns of this approach are to categorize and classify conflict and to link organizational and board structures to organizational performance outcomes and manifestations of relationship-based, task-based, and process-based conflicts. The cultural approach moves somewhat closer to addressing the role of organizational participants, but falls short of truly embracing the importance of how organizational actors impact the organization itself. As detailed in the last section, this approach, while cognizant of embedded agency and applicable to multiple levels of analysis, still mainly focuses on the top-down role that dominant institutional logics play in promoting conformity within fields and organizations. Scholarship in this area generally prefers to show how institutional forces structure organizational behavior rather than examining how individual and organizational perceptions and practices affect the nature of these forces. Save for some very recent research on micro-level processes, this literature currently lacks a clear, empirically based understanding of how social actors translate logics into action as they engage in everyday organizational activities or how individual-level activities help reproduce or transform organizational structures. 14 As such, both the structural and cultural explanations of conflict omit the concern for individual agency.

14 This shortcoming has recently been recognized by institutional and institutional logics theorists (Powell and Colyvas, 2008; Thornton, Ocasio, and Lounsbury, 2012; Powell and DiMaggio, 1991; Zucker, 1991). Powell and Colyvas (2008: 277) address this gap: “In our view these macro lines of analysis could also
I ultimately offer and develop a third explanation for conflict. My explanation draws from recent scholarship in the institutional work and ambidexterity literatures and addresses how individual and organizational decisions and activities affect the variability of conflict in homeowners’ associations. I argue that organizational actors’ responses to institutional pluralism and complexity, as evidenced in their perceptions and practices, determine whether a hybrid organization is subject to more or less intra-organizational conflict. I will show that all homeowners’ associations are subject to institutional pluralism and complexity but will argue that less conflicted homeowners’ associations respond by ambidextrously maintaining both the economic logic of homeownership and the social logic of homeownership while more conflicted homeowners’ associations respond by eliminating one of the logics or compartmentalizing logics. Board members in ambidextrous homeowners’ associations perceive institutional pluralism and complexity as routine and thoughtfully Ńdo logic by making adjustments, improvising, and switching. Board members in non-ambidextrous homeowners’ associations perceive institutional pluralism and complexity as novel and automatically contest or separate logics.

Central to my alternative explanation for the variability in intra-organizational conflict in homeowners’ associations are the concepts of institutional work and institutional ambidexterity. Each of these concepts draws from an institutional profit from a micro motor. Such a motor would involve theories that attend to enaction, interpretation, translation, and meaning. Institutions are sustained, altered, and extinguished as they are enacted by individuals in concrete social situations. Thornton, Ocasio, and Lounsbury (2012) echo this sentiment in their recent synthesis of the institutional logics perspective; they advance a new theory on the micro-foundations of the institutional logics perspective which advocates an understanding of the relationship between micro- and meso-levels of analysis (individuals and organizations).
perspective and recognizes that institutions have enduring and profound effects on the thoughts, feelings, and behavior of individual and collective actors, yet also understands that individual and collective actors are similarly able to have enduring and profound effects on institutions. The concept of institutional work, for example, describes the purposive action of individuals and organizations aimed at creating, maintaining, and disrupting institutions (Lawrence and Suddaby, 2006: 215) and the concept of institutional ambidexterity, in the same vein, describes the ability of individuals and organizations to simultaneously perform contradictory processes when both are critical to organizational success (Jarzabkowski et al., 2013: 45). These two concepts are at the forefront of efforts by institutional theorists to establish a broader vision of individual agency in relationship to organizations and institutions.

The concept of institutional work depicts institutional actors as reflexive, goal-oriented, and capable, and focuses on actors’ actions, and strives to capture structure, agency, and their interrelations (Battilana, Leca, and Boxenbaum, 2009). Scholarly work in the area is oriented around discovering how institutions are created, maintained, and disrupted through institutional actors’ purposeful action; recent studies have connected these processes to situations of institutional pluralism and complexity. Jarzabkowski, Matthiesen, and Van de Ven (2009), for example, studied how different organizational actors grappled with opposing institutional logics in a utility company. They found that

15 Ambidexterity literally means the ability to use one’s hands equally well. Organizational and management scholars have appropriated this term and leveraged this metaphor to deal with paradoxes; such as how organizations can simultaneously engage in both exploitation and exploration (March, 1991; Tushman and O’Reilly, 1996). Exploitation refers to an organization’s ability to be aligned and efficient with current business demands while exploration refers to an organization’s ability to be adaptive to changes in the environment (Raisch and Birkinshaw, 2008: 685).
organizational actors purposefully engaged with market and regulatory logics and actively did creation work, maintenance work, and disruption work in their day-to-day activities and decisions. They suggest that actors frequently engaged in the politics of logics to influence organizational outcomes. The type of institutional work actors engaged in often determined organizational outcomes like intra-organizational conflict or adjustment.

The concept of institutional ambidexterity has most recently been used to show how organizations can develop the simultaneous capacity to engage in two (or more) predominant beliefs and practices and with two (or more) institutional logics. Scholarly work in this area is oriented around discovering how organizations cannot only regularly and consistently engage with multiple institutional logics but also potentially benefit from the presence of multiple, and potentially contradictory, institutional logics. Ambidexterity can be realized in hybrid organizational structures like blended or structurally differentiated hybrid organizations (Greenwood et al., 2011), but is ultimately about organizational practices (Jarzabkowski, Smets, and Bednarek, 2013). This approach recognizes that institutions themselves cannot be ambidextrous; rather, people do institutional ambidexterity in their everyday actions and interactions as they work within and enact multiple logics (Jarzabkowski, Smets, and Bednarek, 2013: 11).

These two concepts, and their respective scholarship, have developed separately for the most part. I join together these two bodies of literature and incorporate the two concepts to establish my explanation of intra-organizational conflict. I propose that in situations of institutional pluralism and complexity, organizational actors either do or
doing or not doing of logics, rather than just the mere presence of multiple institutional logics, that creates the potential for more and less intra-organizational conflict. When organizational actors doing logics they act ambidextrously to engage in a politicized process of maintaining multiple logics (a form of institutional work) via context-specific and purposeful practices including adjustment, improvisation, and switching. Because organizational members perceive institutional complexity as routine they are better able to anticipate conflict and meet the institutional demands of their organizationâ€™s hybrid organizational form. As a result ambidextrous organizations are less conflicted. Organizational actors who donâ€™t do logics eliminate and compartmentalize multiple logics by disrupting (another form of institutional work) one or more institutional logics via instinctual and automatic practices including contestation and separation. Because organizational members perceive institutional complexity as novel they view it problematically and are unable to meet the institutional demands of their organizationâ€™s hybrid organizational form. As a result non-ambidextrous organizations are more conflicted.

Summarily, both the structural and cultural explanations of conflict hold weight. Each perspective is able to empirically explain some of the conflict in homeownersâ€™ associations. These perspectives, however, are greatly limited by their inability to fully explain the conflict that homeownersâ€™ associations experience; they are unable to do so because the structural and cultural approaches do not connect to the micro-level experiences of individuals on the ground, those homeowners who volunteer who are elected to serve on the homeownersâ€™ association board. In this dissertation, I will offer
and develop a third explanation. My explanation suggests organizational actors, in this case primarily homeowners’ association board members, create the potential for both more and less intra-organizational conflict in hybrid organizations like homeowners’ associations. It is their responses to institutional pluralism and complexity, as evidenced in their perceptions and practices and their relative ability to ÒdoÓ logics, which determines the variability of intra-organizational conflict.

**Research Design**

To review, this dissertation seeks to address three main questions: 1) How common is intra-organizational conflict in homeowners’ associations; 2) What are the sources of intra-organizational conflict in homeowners’ associations; and 3) What makes some homeowners’ associations more and less conflicted? To answer these questions I engaged in a two-step, mixed method research process. The first step was quantitative. I created an original survey to gather descriptive and categorical information on homeowners’ associations in the Greater Boston-area. The Homeowners’ Association Board Member Survey was mailed to board members of approximately 250 homeowners’ associations in the spring of 2011 and consisted of a series of closed-ended questions which were designed to gather data on the frequency of conflict in homeowners’ associations and the external and internal organizational attributes of homeowners’ associations. More information about data collection and analysis for this step of my research process can be found in Chapter Two: Structure v. Culture: The External and Internal Determinants of Conflict. A copy of my survey instrument can be found in Appendix A. The second step was qualitative. I conducted 56 semi-structured interviews
with board members of homeowners' associations, made observations of homeowners' association meetings, events, and professional events, and analyzed documents (e.g., CC&Rs, board minutes, and memorandums) from homeowners' associations that are more and less conflicted. More information about data collection and analysis for this step of my research process can be found in Chapter Three: Identifying, Explaining, and Defining the Logics of Homeownership and Chapter Four: "Doing" Logics to Lessen Conflicts. A copy of my board member interview schedule can be found in Appendix B.

**Organization of Dissertation**

The next chapter, Chapter Two: Structure v. Culture: The External and Internal Determinants of Conflict, examines the influence of structural and cultural and external and internal organizational attributes on the presence of intra-organizational conflict in homeowners' associations. Using survey data from approximately 250 homeowners' association board members in Massachusetts, I investigate the degree to which various external and internal characteristics associated with organizational and board structure and culture predict whether this type of hybrid organization experiences division among its governing members and the larger community. The findings provide support for several of the structural and cultural and external and internal organizational attributes hypothesized to predict intra-organizational conflict in private, nonprofit, and public organizations; however, a cultural and internal measure of the presence of multiple institutional logics emerges as the key predictor of intra-organizational conflict in homeowners' associations. Homeowners' associations whose board members report congruity of organizational vision experience intra-organizational conflict at substantially
lower rates than homeowners' associations whose board members do not report congruity of organizational vision.

In Chapter Three, "Identifying, Explaining, and Defining the Logics of Homeownership," I use institutional theory and the institutional pluralism and institutional complexity constructs to confirm the hybrid organizational form of homeowners' associations. I build upon the suggestion of the previous chapter that multiple institutional logics are present in homeowners' associations and draw upon qualitative interviews with homeowners' association board members, observations of homeowners' associations, and textual analysis of homeowners' association documents to identify, explain, and define the existence of two institutional logics in the hybrid institutional environment of homeowners' associations: an economic logic and a social logic. The economic logic of homeownership views homeownership as a financial investment and appeals to an individual's pursuit of self-interest. The social logic of homeownership views homeownership as a civil investment and appeals to a collective's pursuit of community. I argue that the American ideology of homeownership generates and institutionalizes these logics and that institutional complexity results from the problematic intersection of the American ideology of homeownership and homeowners' associations' hybrid organizational form. Homeowners' associations and their organizational actors' cultural embeddedness in the American ideology of homeownership generates conflicting visions about the purpose of homeownership, the nature of the identity of homeowner, and the purpose of a homeowners' association.
In Chapter Four, “Doing Logics to Lessen Conflicts,” I use recent micro-theorizing in institutional theory and the concepts of institutional ambidexterity and institutional work to explain the presence of and variability in intra-organizational conflict in homeowners’ associations. I argue that it is not the mere presence of multiple institutional logics in an organizational environment that causes intra-organizational conflict as the institutional logics literature often presumes, but instead organizational actors’ responses to institutional pluralism and complexity. Organizational responses to institutional pluralism and complexity, in particular those actualized in organizational actors’ perceptions and practices, create the potential for more and less intra-organizational conflict. Once again drawing upon my qualitative interviews with board members of homeowners’ associations, observations of homeowners’ associations, and textual analysis of documents from homeowners’ associations that are more and less conflicted, I will show that all homeowners’ associations are subject to multiple and contradictory logics (i.e., exhibit the conditions of institutional pluralism and complexity), but will provide evidence that the homeowners’ associations that respond to institutional pluralism and complexity by eliminating or compartmentalizing institutional logics are more conflicted. Eliminatory and compartmentalizing (i.e., non-ambidextrous) homeowners’ associations respond to institutional pluralism and complexity by adhering to a single institutional logic either by contesting or separating new or alternative institutional logics. This response creates a cycle of problem and contestation that ultimately results in an incongruous organizational vision and more intra-organizational conflict. Homeowners’ associations that respond to institutional pluralism and complexity
ambidextrously are less conflicted. Organizational actors in ambidextrous homeowners’ associations are able to move between the economic and social logics of homeownership. They actively maintain both logics, use their logics as a cultural and practical “toolkit,” and draw upon the economic logic of homeownership or the social logic of homeownership as a decision, activity, or practice requires; they thoughtfully “do” logics by making adjustments, improvising, and switching between logics on a context-specific basis. This response creates a self-reinforcing cycle of ambidextrous action that ultimately results in a congruous organizational vision and less intra-organizational conflict.

The concluding chapter revisits and summarizes my argument and then explores its implications for the sociology of organizations, institutional theory and the institutional logics perspective, the public and policy discourses surrounding homeowners’ associations, and future research in the area of intra-organizational conflict, hybrid organizations, and homeownership.
CHAPTER TWO: STRUCTURE V. CULTURE – THE EXTERNAL AND INTERNAL DETERMINANTS OF CONFLICT

Introduction

Hybrid forms of organizations are increasingly populating all sectors of society.¹⁶ The increased presence of forms of hybrid organizations in recent years reflects basic changes in the institutional structure of modern societies and the blurring of the boundaries between the roles of business, civil society, and government. Institutional theory suggests that hybrid organizations exist in "institutionally pluralistic" environments (Kraatz and Block, 2008) and must negotiate institutional complexity due to the presence of multiple, and potentially competing, institutional or action logics. In such an environment, intra-organizational conflict is assumed to arise from the presence of multiple institutional logics and their underlying rationales and value dispositions. Incongruent organizational visions and different manners of governance may result in unclear organizational goals and preferred modes of action (e.g., is the organizational goal of a homeowners' association to increase property values, to provide services, or to create a sense of community?) and instability. The determinants of conflict in hybrid organizations, however, have not been empirically studied, and such an explanation contrasts much research in the area which identifies organizational attributes associated with organizational and board structures, rather than its culture, as significant predictors of conflict in private organizations (Wall and Callister, 1995; Pfeffer, 1972), non-profit

¹⁶ A hybrid organization is any organization that "mixes elements, value systems, and action logics of various sectors of society" (Karré, 2010).
organizations (Cornforth, 2001; Brown, 2005), and public organizations (Grissom, 2010; Kochan, Huber, and Cummings, 1975).

This chapter assesses the explanatory power of organizational attributes associated with traditional "structural" explanations of intra-organizational conflict and newer "cultural" explanations of intra-organizational conflict in homeowners' associations. It draws from disparate strands of literature on private, nonprofit, public, and hybrid organizations to form hypotheses about potential external and internal determinants of intra-organizational conflict and then tests their predictive power based on an original survey of approximately 250 homeowners' association board members in Massachusetts. As I explained in the last chapter, homeowners' associations are a type of hybrid organization: they provide services like the public sector, are often incorporated as nonprofits, and have a management style similar to for-profit corporations. These organizations occupy a fuzzy and porous space at the intersection of the three institutional sectors of society (the market, the state, and civil society) and have been likened to "residential private governments" (McKenzie, 1994) because of their hybrid organizational form. My findings provide some support for both the "structural" and "cultural" explanations of conflict; several of the external and internal organizational attributes hypothesized to predict intra-organizational conflict in private, nonprofit, and public organizations are found to be statistically significant predictors of intra-organizational conflict in homeowners' associations. An internal and cultural measure of the presence of multiple institutional logics, however, emerges as the key predictor of intra-organizational conflict in homeowners' associations. Homeowners' associations
whose board members report congruity of organizational vision experience intra-organizational conflict at substantially lower rates than homeowners’ associations whose board members do not report congruity of organizational vision. This outcome suggests that cultural explanations of conflict may be better suited for hybrid organizations like homeowners’ associations.

**Predicting Conflict in Organizations**

This section will draw upon multiple strands of literature to identify the elemental rationale of and organizational attributes associated with traditional *structural* explanations of intra-organizational conflict. Structural explanations of intra-organizational conflict suggest that organizational and board attributes best predict the occurrence of conflict in organizations. This perspective contends that organizational structures underlie all of the perceptions and practices that take place in an organization; if there is conflict it is because of the characteristics of the group or organization itself. Scholarship in this area principally draws from three broad bodies of literature. The first is literature on group decision-making, including work on the three domains of conflict and the role of conflict in influencing the quality of group decisions and its outcomes for organizational effectiveness. The second is a large body of work which assesses the role of governing boards in private, nonprofit, and public organizations. And the third is literature that focuses on categorizing the determinants of intra-organizational conflict in organizations of all institutional sectors. In this last section I will adapt and advance a typology of determinants of intra-organizational conflict to form hypotheses about
potential external and internal contributory factors of intra-organizational conflict in homeowners’ associations.

Conflict and Group Decision-Making

Rahim (2001) suggests that intra-group conflict is likely to occur in organizations where independent social actors are required to engage in activities that are incongruent with individual interests; hold behavior preferences which are incompatible with another’s preferences; want some resource that is in short supply; and possess attitudes or goals which compete with another’s attitudes or goals. Conflict, in this view, is rooted in social interactions between entities where there are misaligned interests and as manifested in social-behavior interactions marked by tension, frustration, annoyance, interference, and rivalry. Intra-group conflict is thus likely to emerge in the process of group decision-making.

A common objective in the literature on group decision-making is to identify different domains of conflict. As discussed in the previous chapter, researchers have generally identified three domains of organizational conflict: relationship-based conflict, task-based conflict, and process-based conflict. Relationship-based conflict, also called affective or interpersonal conflict, refers to conflicts usually sparked when two people have incompatible values, perceptions, and expectations. Priem and Price (1991) assert that interpersonal conflict is emotionally-based and oftentimes does not relate to organizational tasks, but rather reflects personality differences. Task-based conflict, or substantive conflict, involves disagreements about which substantive tasks should be pursued. This type of conflict is cognitive, and often centers on an analysis of what work
should and should not be done. Process-based conflict, also called procedural conflict, involves disagreements about how selected tasks should be accomplished.

Because of the emphasis on this three domain typology, much of the scholarship on group decision-making processes centers on evaluating the functional or dysfunctional outcomes of each domain on conflict. This scholarship in particular has a tendency to evaluate conflict based on its functionality, framing it as either a negative or a positive force. Amason (1996), for example, studied management teams in food processing and furniture production. He found conflict to be multidimensional, taking both functional (cognitive and task-oriented) and dysfunctional (interpersonal) forms. Using survey data, he directly linked both negative and positive outcomes to intra-group conflict: dysfunctional conflict lowered decision quality due to lack of consensus among group members and functional conflict improved decision quality due to a synthesis of perspectives. In a similar qualitative study, Jehn and Mannix (2001) observed 51 teams of MBA students from three universities as they engaged in the consultation process with local firms. As in the Amason study, the authors hypothesized a negative role for interpersonal or relationship conflict, but a potentially positive role for task conflict. They concluded that high-performing work groups tend to have lower degrees of both task and relationship conflict; a finding which counters that of Amason.

This two-dimensional view of conflict appears quite frequently in the literature on group decision-making in the private sector. The common theme is that one domain (i.e., relationship-based conflict) is detrimental and the other domains (i.e., task-based conflict and process-based conflict) are, potentially, beneficial (see Jehn, 1995; Simons and
Peterson, 2000). In a meta-analytic review of thirty studies from this literature, however, De Dreu and Weingart (2003) concluded that there is little evidence to support the assertion that interpersonal and task conflict correlate differentially with team performance: “for team performance, task conflict and relationship conflict are equally disruptive” (746). This finding supports Hearn and Anderson’s (2002) critique that a sole emphasis on this three domain typology obscures, conflates, and oversimplifies the nature of intra-group conflict. To suggest that a conflict is relationship-based, for example, is largely to note that the conflict has become apparent through interpersonal differences. Whether this is true or not ultimately depends upon whether organizational conditions set the stage for such disagreements. For example, if one long-term member of a homeowners’ association governing board argues with a newly elected board member over whether to levy a special assessment for a new roof or a new boiler, which matters more: whether this incident is classified as one of those three domains of conflict (namely interpersonal or task) or whether the conflict was caused by underlying organizational attributes related to the complexity of the organizational environment or the structure and composition of the board? Hearn and Anderson, drawing from Merton’s (1968) propositions that (a) underlying conditions of conflict in social systems may produce manifest conflict episodes or remain latent, and (b) the behavioral manifestation of underlying conflict (e.g., an argument over an individual’s proposed use of funds) does not necessarily redress the underlying conflict condition, suggest the latter.

Scholarship in this area, including Amason’s (1996), Jehn and Mannix’s (2001), and De Dreu and Weingart’s (2003) aforementioned studies, strongly suggest that
foundational organizational attributes contribute to the development of intra-group conflict during the decision-making process and can negatively affect organizational performance. Hearn and Anderson (2002) in their study of conflict during the tenure decision-making process in academic departments, for example, found that conflicts over tenure and promotion votes were overall more likely in departments with larger instructional volume, departments whose disciplinary bases were soft, departments with less specialization, and departments that were larger in size. They conclude, in part, that the structural conditions of the academic departments primed the group for conflict. They, and other scholars, have thus identified intra-group and group decision-making conflict as an important area for study because of its tendency to result from underlying structural attributes of the organization and the potential it has to interfere with organizational performance.

Conflict and Board Governance

Governing boards provide oversight to many kinds of organizations, including private organizations like corporations, non-profit organizations like public charities and community foundations, and public organizations like municipal governments and schools. The board members of these organizations play key roles in setting policies, monitoring performance, formulating organizational strategy, and defining organizational goals; this places them at the frontlines of an organization, so how they work together has important implications for the functioning of the organization, the management of the organization, and for the organization’s performance (i.e., its ability to meet its goals). Not surprisingly then, the effects of conflict and division among leaders and
organizational participants serving on governing boards has been studied extensively, particularly in private, market-based organizations.\textsuperscript{17}

Like in the group decision-making literature, conflict and division among leaders and organizational participants on governing boards is also generally viewed as a negative force in organizations, especially in terms of organizational performance and satisfaction (March and Simon, 1958; Pondy, 1967; Blake and Mouton, 1984). Research on the topic in the corporate management literature indicates that while some conflict is inherent in social processes, a large amount of intra-board conflict can lower decision quality, make boards less effective, and undermine organizational performance. And although a summary review by Korac-Kakabadse, Kakabadse, and Kouzmin (2001) concluded that research has generally failed to uncover any "universal" associations between board attributes and organizational performance, there is a great deal of research from all sectors which does link various characteristics of boards to organizational performance. Scholars have assessed the linkages between such characteristics as board size (Eisenberg, Sundgren, and Wells, 1998; Pfeffer, 1972), board composition and structure (Coles, McWilliams, and Sen, 2001; Dalton et al., 1998; Dulewicz and Herbert, 2004; Kula, 2005; Pfeffer, 1972), and board practices (Dulewicz and Herbert, 2004; Kula, 2005) and firm performance\textsuperscript{18}. Herman and Renz (1999, 2000), for example, found a connection between the effectiveness of nonprofit board decision-making and the effectiveness of the overall organization. In this sector, board of directors members

\textsuperscript{17} For a review of theoretical and empirical studies of conflict among leaders and team members in private organizations (i.e., firms), see Wall and Callister (1995).

\textsuperscript{18} Firm performance was primarily measured by financial outcomes.
interpersonal and strategic competencies (Brown, 2005), commitment to the organization (Preston and Brown, 2004), and intentional efforts to improve board management (Brudney and Murray, 1998) have all been associated with organizational performance. Finally, board conflict and organizational effectiveness have also been shown to be related in public organizations (Merz, 1986; Danzberger, Kirst, and Usdan, 1992; Danzberger, 1994). Here, scholars have found linkages between characteristics such as board size (Grissom, 2010), board member training (Anderson, 1992), and goal compatibility (Watson and Hassett, 2003) and organizational performance. In one recent study on the determinants of conflict on governing boards in public organizations Grissom (2010) found that external characteristics of public school boards play a large role in predicting intra-board conflict; heterogeneous school districts were significantly more likely to experience intra-board conflict than more homogenous school districts.

Few studies have examined group decision-making conflict in the context of the corporate boards of trustees. Data limitations are likely a cause of the closed-door nature of most corporate boards and the reticence of board members to discuss confidential decision-making processes. Work on boards of trustees in the nonprofit and public sectors, however, suggests that the detrimental impacts of conflict observed on the decision-making process by private sector work teams extends to the decision-making process of governing boards. For example, Bradshaw, Murray, and Wolpin (1992) found an inverse relationship between board conflict and effectiveness; CEOs of Canadian nonprofit organizations rated their boards more effective when board conflict was lower. Similarly, Cornforth (2001) found that nonprofit boards in Great Britain who reported
being able to manage conflict among themselves were also judged to be more effective. Brown (2005) drew on data from nonprofit board members and executives in Los Angeles and Phoenix to conclude that boards characterized by collegial group processes and strong interpersonal relationships tended to be more effective than boards that did not exhibit these characteristics. In the public sector, Whitaker and DeHoog (1991) linked political conflict and instability on city councils to negative organizational outcomes, namely higher turnover among managers in municipal governments. In a similar study of city councils, Watson and Hassett (2003) found that city council stability and support of management were associated with positive organizational outcomes like low attrition of city managers. Qualitative work on school boards also supports the idea that board conflict can lead to negative outcomes. Carol et al. (1986) cite board factionalism and an inability to manage differences among members as hindrances to board effectiveness. Poor interpersonal relations between board members and with the superintendent were markers of poor governance based on a series of case studies by Goodman, Fulbright, and Zimmerman (1997). By extension, Hill, Wise, and Shapiro (1989) also find that intra-group conflict in the decision-making process of governing boards of schools is a predictor of organizational effectiveness.

**Determinants of Conflict**

Taken together, the research on private, nonprofit, and public sector decision-making, governance, management, and work teams suggests that identifying the sources of conflict in hybrid organizations and their governing boards is an important area for study because it matters for overall organizational effectiveness. Yet, no studies have
attempted to identify the determinants of intra-organizational conflict in any type of hybrid organization and scholarship on hybrid organizations implicitly assumes any conflict is due solely to the mere presence of multiple institutional logics. This is a significant omission from the literature, particularly in an age when the number of hybrid forms of organization continues to grow and the sectorial lines of demarcation continue to blur. My research guided by prior work in the private, nonprofit, and public sectors, tests predictions for whether organizational attributes associated with organizational and board structure or culture best predict the occurrence of intra-organizational conflict in homeowners’ associations. I do this by adapting and advancing a typology of potential external and internal determinants of intra-organizational conflict developed in prior research.

While acknowledging that the focus of most literature on intra-organizational conflict has been on the outcomes rather than the causes of intra-organizational conflict, Wall and Callister (1995) enumerate a long list of potential antecedents that prior research has either assumed or examined specifically. In adapting this list and other research studying intra-organizational conflict I utilize a typology proposed by Hung (1997) and tested by Grissom (2010) which makes a useful distinction between external and internal organizational and board attributes that shape board dynamics and

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19 It has been observed that the causes of conflict emphasized by scholars seldom pertinently addressed the organizational level; earlier and more recent accounts of the sources of conflict in many instances addressed the subject at the macro-structural rather than the micro-organizational level (Dahrendorf, 1976; Marx, 1965; Mayer, 2000). Those who did consider the causes of conflict at the organizational level identified a multitude of potential sources of conflict including differences in knowledge, beliefs or basic values; a drive for autonomy; personal dislikes; and differing perceptions or attributes brought about by the organizational structure, different role structures, heterogeneity of the workforce, environmental changes, differences in goals, diverse economic interests, loyalties of groups, and value discrepancies (Weider-Hatfield and Hatfield, 1995).
organizational orientations to develop hypotheses about potential contributory factors consistent with traditional structural explanations of intra-organizational conflict and newer cultural explanations of intra-organizational conflict.\textsuperscript{20} External factors refer to those that are beyond the control of the organization but which affect its structure and development. They come from the environment or are structural characteristics that the board must take as a given. These might include organizational context variables, the relationships to other organized groups, or pre-existing and/or unchangeable structures of the organization. Internal factors are under the control of the organization and often derive from institutional choices, organizational culture, board practices, or characteristics of the board members themselves.\textsuperscript{21} For the most part, any organizational attributes that structure, form, or arrange the organization and its environment are considered consistent with the "structural" explanation of conflict. This includes external organizational attributes including measures of organizational structure and the complexity of the organizational environment and internal organizational attributes like board structure and composition. Organizational attributes that derive from organizational culture, choices, and practices are considered consistent with the "cultural" explanation.

\textsuperscript{20} Hung (1997) and Grissom (2010) refer to external characteristics as "extrinsic" and internal characteristics as "intrinsic".

\textsuperscript{21} The distinctions between external and internal factors are sometimes arbitrary. For example, board size might be categorized as external because it is codified in the legal documents of the association and therefore is unchangeable; however, it also could be categorized as internal because its real impact on conflict is as a characteristic of the norms of the group itself. Another example may be availability of resources. These are external in the sense that they are a part of the organization’s environment and therefore structure its activities, but internal in the sense that board members, particularly in a homeowners’ association, can choose how strongly they value saving or spending and may impact the availability of resources because of their decision-making practices.
of conflict. This includes internal organizational attributes related to organizational and board ideology and manners of governance.

External Factors

Studies in private firms commonly assume that the complexity of the environment predicts greater conflict. As Wall and Callister (1995: 522) note, the complexity of the problems with which a group or organization must deal is more likely to generate misunderstanding, to tap divergent interests or unearth dissimilar goals. Increasing uncertainty and complexity in the operating environment of organizations provide fertile ground for the onset of conflict in the organization; an increase in the incidence of conflict is to be expected (De Dreu, Dierendonck, and Dijkstra, 2004). The complexity of an organizational environment can include any number of factors and generally comprises the specific environment (e.g., that which is directly relevant to the achievement of an organization’s goals) and the general environment (e.g., the broad external conditions that might affect the organization and its achievement of its goals).

Applied to homeowners’ associations, the complexity of the environment may include such factors the age of the community, the size of the community, the amount of heterogeneity in the community, and the availability of economic resources.

Ecological studies have consistently reported that the age of an organization is an important structural feature of organizations and directly relates to its functioning. While these studies primarily view age through the lens of organizational mortality and survival, the theorists understand the liabilities associated with being new or aging contribute to the complexity of the organizational environment and are ultimately a culmination of a
variety of structural conditions, problems, and characteristics which may be associated with conflict. Stinchcombe (1965), for example, cites four underlying reasons for why young organizations in particular are more susceptible to intra-organizational conflict: (1) the difficulties that new organizations experience in reproducing roles, settling on operating procedures, creating a culture and learning skills; (2) the high costs or inefficiencies associated with inventing roles and structuring relations; (3) problems inherent in establishing working relationships; and (4) the uncertainty associated with establishing ties to those in the organizational environment. Hannan and Freeman (1989), by extension, state that young organizations will flounder until the organization has established routines, control systems, and institutionalized roles; the organization must prove its stability and reliability to its stakeholders. Thus there are liabilities to newness that create complexity in the organizational environment. And although this type of risk decreases as the organization ages, other risks, such as the liability of senescence (Ranger-Moore, 1997) and the liability of obsolescence (Carroll, 1983; Baum, 1989), may increase the complexity of the organizational environment later in organizational life. In sum, this literature suggests that organizational age strongly influences the structural arrangements (i.e., the rules, resources, and practices) of organizations: younger organizations lack established organizational and governance structures, while older organizations may either have the advantage or disadvantage of established organizational and governance structures. Based on this literature, it is hypothesized that younger homeowners’ associations will report having experienced conflict more frequently than older homeowners’ associations.
Organizational research generally supports the notion that size is associated with intra-organizational conflict. Corwin (1970) found a positive relationship between organization size and conflict in his study of schools, but suggested that this relationship was mediated by other organizational attributes. Beck and Betz (1975) and Gmelch and Carroll (1991) also found some evidence to support the proposition that larger organizations experience more conflict, with the former adding that this may be due to increasing heterogeneity in the organizational environment, and the latter adding that increasing size leads to increasing ambiguity in terms of organizational goals and mission. Those organizations with larger numbers of organizational participants face a more complex organizational environment both because the number and difficulty of issues they confront are increasing and because there is increasing diversity amongst organizational participants regarding their goals, values, and preferences.

Relatedly, organizational literature unfailingly sets forth the proposition that, controlling for other factors likely to influence organizational functioning, conflict in organizations increases in tandem with increasing heterogeneity (Carroll and Harrison, 1998; Haveman, 1995; Hearn and Anderson, 2002). Heterogeneity is tied to multiplicity: the more diversity there is in an organization the more opportunity there is for difference and dissonance. In practice, then, organizational size and heterogeneity are often related to the extent that an increase in one results in an increase in the other. Here they are both hypothesized to be associated with increased reports of conflict: it is expected that larger homeowners’ associations will report having experienced conflict more frequently than smaller homeowners’ associations and that more heterogeneous homeowners’ associations
communities will report having experienced conflict more frequently than less heterogeneous homeowners’ association communities.

Resource dependency theory argues that the key to organizational survival is to acquire and maintain resources (Pfeffer and Salancik, 1978). It follows then that economic and budgetary resources are a key feature of an organization’s environment; in homeowners’ associations budgetary resources derive from fees and special assessments which are used to maintain common areas of the property and to fund community reserves. Organizational performance is intricately tied to the availability and appropriate utilization of resources; conflict may emerge during the process of resource acquisition and maintenance. It is not clear, however, in what direction the association will run: fewer resources may lead to more or less conflict. Pondy (1967) identified scarce goods within an organization as one of three types of conflict-producing situations which provide the necessary environment for the development of conflict. Because there are scarce resources, board members are more likely to compete, bargain, and jockey for a power position in decision-making. Thus action becomes a structured activity and fewer resources will lead to more instances of conflict. Alternatively, when resources are scarce there may be less conflict because organizational priorities will be more apparent and institutional choices will be shaped, and likely narrowed, by the budgetary environment. With fewer choices to be made, there are fewer opportunities for disagreement.

22 A reserve fund is the money paid as part of the homeowners’ association dues and held in reserve by the homeowners’ association to pay for routine but sometimes expensive maintenance such as replacing roofs, resurfacing parking lots, or installing new sprinkler systems. If the association does not have enough money in the reserves then the maintenance either does not get done or a special assessment is levied against all of the owners. It is recommended by the Community Associations Institute (CAI) that the reserve of any association is funded at 70% or more of the recommended level to avoid having insufficient funds.
Nonetheless, research has generally shown that conflict increases when resources are scarce; thus this research hypothesizes that those homeowners’ associations who report having insufficient reserve funds (i.e., fewer available resources) will report experiencing conflict more frequently than those homeowners’ associations who report having sufficient reserve funds (i.e., greater available resources).

Internal Factors

Many studies in the group decision-making and governing board literatures have demonstrated that characteristics of the group itself are significant predictors of intragroup conflict. The structure and composition of the board contribute to the functioning of the organization. Member diversity in the structure and composition of the board increases the number of different preferences and alternative viewpoints brought to the decision-making process, making reaching a consensus more difficult (Amason and Schweiger, 1994). Moreover, people with different backgrounds, levels of experience, and/or perspectives may have trouble socially integrating to approach a common problem (Horwitz and Horwitz, 2007). Consistent with this view, Pelled, Eisenhardt, and Xin (1999) found that group heterogeneity can predict emotional conflict on work teams. Ancona and Caldwell (1992) and Jehn, Northcraft, and Neale (1999) similarly link heterogeneous group characteristics with experiences of interpersonal conflict. Three indicators of the heterogeneity of board structure and composition in homeowners’ associations are size of board, length of term, and type of management.

Pelled, Eisenhardt, and Xin (1999), in their study of work teams in the electronics industry, find group size to be positively correlated with both task and emotional conflict.
in the work groups they observed. Because larger decision-making bodies must aggregate the preferences of a larger number of decision-makers, it is possible that larger governing boards may tend to experience greater intra-board conflict than smaller governing boards. Other studies, however, suggest that group size may reduce conflict. For example, Cox’s (2003) study of nurses organized into subunits within a hospital found that larger groups were less likely to report conflict. This finding was tempered by the fact that Cox could not identify why this was true. Board size is hypothesized here to be positively associated with organizational conflict; homeowners’ associations with larger board sizes are expected to report experiencing conflict more frequently than homeowners’ associations with smaller board sizes.

Board term length is an important characteristic of the board. One survey of nonprofit governance procedures found that one third of the organizations surveyed reported having no set term limits for board chairs and/or members or not enforcing set term limits for board chairs and/or members (BoardSource, 2010). Without set or enforced term limits, board members may be more likely to serve on the board for a long period of time, resulting in a more uniform, practiced, and homogeneous board. Other research has shown that an abundance of long-serving board members decreases the likelihood of debate and increases the likelihood of groupthink (Martirossian, 2001). In homeowners’ associations, the legal documents of the association often dictate the term length of elected representatives. In practice, however, board members are often volunteers from the homeowners’ association community who serve indefinite terms. Thus, this research hypothesizes those homeowners’ associations who report having
many long-serving members will report experiencing conflict less frequently than those homeowners' associations who report having few long-serving members.

Conflict has been closely associated with the general concept of structural differentiation, or the specialization and/or differentiation of organizational units (Beck and Betz, 1975; Corwin, 1970; Thomson, 1961). The degree of organizational complexity, or the hierarchical division of authority, is a dimension of structural differentiation and is linked to organizational conflict. Corwin (1970) noted that the centralization of authority increases organizational complexity and creates the conditions for conflict because it spurs both the creation of different positions, and the establishment of differential control over decisions. Homeowners' associations are increasingly hiring contract managers and private management companies, increasing the number of administratively distinct but functionally interdependent sub-units, thereby increasing the complexity of the organizational governance structure and further specializing the role of the board. March and Simon (1958) see structural differentiation as increasing the amount of tension and the potential for intra-organizational conflict between organizational groups because of the need for the division of labor and joint decision-making. The type of management (self-management or private-management) utilized by homeowners' associations represents degree of structural differentiation: those associations who choose to self-manage are less structurally differentiated than those associations who choose to hire a private manager or management company. It is proposed then that those homeowners' associations that employ a manager or a private
management company will report experiencing conflict more frequently than homeowners’ associations that do not employ a manager or management company.

Board decision-making practice variables, such as sharing of information, attentiveness to rules, and ideological homogeneity, represent internal and cultural factors of organizations that can influence experiences of intra-organizational conflict. It is these institutional decisions that often shape the identity, culture, and governance practices of the organization. Multiple studies have shown the importance of “good governance” practices for board and organizational effectiveness in the private, nonprofit, and public sectors (Herman and Renz, 2000; Conforth, 2001). Boards, and ultimately organizations, may experience less conflict because professionalization may serve to bring regularity, procedure, and routine to the decision-making process. These practices frame the manners of board governance and allow the board to deal more straightforwardly with dissension (Carol et al., 1986) and ultimately help to avoid future conflicts.

Research supports the notion that group information sharing practices are related to group performance (Devine, 1999). The amount and quality of information shared is directly and positively related to group effectiveness. It follows then that organizational information sharing practices are related to organizational performance and overall effectiveness. In private organizations, the board of directors is required to share information with its shareholders; in nonprofit and public organizations, the board of directors is required to share information with its constituents. While some information the board of any organization discusses must remain confidential, there is the general expectation that an organization will share budgetary and discretionary information with
organizational participants. When there is a lack of information sharing among board members or when boards fail to disclose information to appropriate parties intra-organizational conflict is likely to occur. Like corporate boards, which have a fiduciary responsibility to make disclosures to shareholders, a homeowners’ association board is supposed to disclose and share budgetary and decision-making information with its members. Thus, this research hypothesizes that those homeowners’ associations who regularly sharing information with organizational participants will also report experiencing conflict less frequently than homeowners’ associations who do not report regularly sharing information with organizational participants.

Research also shows that attentiveness to rules, procedures, and standardization can have differential outcomes for organizations. Kahn (1964) found that organizational conflict was highest where there was low emphasis on rules and less close supervision. Gouldner (1959), however, found that when rules are too prohibitive, organizational members might withdraw their loyalty or rebel from the organization. In homeowners’ associations, legal documents (including bylaws; covenants, conditions, and restrictions; and rules and regulations) set forth rules for the structural organization of the governing board and good governance procedures. In practice, however, boards often fluctuate in

---

23 Bylaws are the guidelines for the operation of the non-profit corporation. The bylaws may define the duties of the various offices of the board of directors, the terms of the directors, the membership’s voting rights, required meetings and notices of meetings, and the principal office of the association, as well as any other specific items that are necessary to run the association as a business. The Covenants, Conditions, and Restrictions (CC&Rs) are the governing legal documents that set up the guidelines for the operation of the planned community as a non-profit corporation. CC&Rs are included in the title to the property and failure of the homeowner to abide by the CC&Rs may result in a fine or other legal actions. Rules and Regulations are provided for in the CC&Rs and adopted by the board of directors. Rules are established to provide direction to homeowners for common courtesies with regard to parking, vehicles, pets, pool use and hours, etc. Associations may also choose to adopt regulations regarding procedures for making exterior changes to the home (including landscaping, exterior color choices, etc.). These rules and regulations are
how frequently and strongly they enforce and/or adhere to the Bylaws, CC&R's, and Rules and Regulations of the association. This research supposes that homeowners' associations who report less frequently adhering to the legal documents of the association (Bylaws, CC&R's, and Rules and Regulations) will report experiencing conflict more frequently than homeowners' associations who report more frequently adhering to the legal documents of the association (Bylaws, CC&R's, and Rules and Regulations).

Another measure of board practices relates to individual ideology. Recently scholars have begun to emphasize the importance of shared organizational vision and goals in their analyses of organizational conflict. Research on board governance has since repeatedly shown that when individual goals for board action are incompatible, conflict is likely to arise (Grissom, 2010; Cornforth, 2001; Carol et al., 1986; Danzberger, 1994; Kochan, Huber, and Cummings, 1975). Golden-Biddle and Rao (1997), in their research on nonprofit organizations, found that organizational identity shapes the governance practices of organizations and can influence organizational performance. In their study on consulting work groups, Jehn and Mannix (2001) identified group value consensus as a predictor of conflict. Similarly, Merz’s (1986) analysis of school board members linked conflict on school boards to expectations about board members' roles.

The potential for conflicting, incongruous, and incompatible individual ideologies may be even greater in hybrid organizations, which institutional theory suggests may be due to "institutional pluralism" (Kraatz and Block, 2008), or the presence of multiple, and

set up to maintain the aesthetic value and integrity of the community to protect the market value of the community. Violations or failure to comply with rules and regulations may result in a fine or other legal actions.
potentially competing, institutional logics. Institutional logics are the socially
constructed, historical patterns of material practices, assumptions, values, beliefs, and
rules by which individuals produce and reproduce their material subsistence, organize
time and space, and provide meaning to their social reality (Thornton and Ocasio, 1999: 804).
This newer cultural explanation for intra-organizational conflict is most closely
associated with organizations like homeowners’ associations whose hybrid organizational
form infers multi-sector interests. In homeowners’ associations, board members may
have different criteria or multiple rationales for manners of governance which may result
in incongruent organizational visions and unclear objective functions (e.g., is the
organizational goal of a homeowners’ association to increase property values (a private
interest), to provide services (a public interest), or to create a sense of community (a civil
interest)?) The lack of a shared vision, or differing individual ideologies, about the
purpose of an organization may therefore indicate the presence of multiple, and
potentially competing, institutional logics; the presence of which has been likened to a
battlefield wrought with conflict and struggles over power (Reay and Hingings, 2005).
It is assumed then that those homeowners’ associations who report sharing a common
vision about the purpose of the association (i.e., congruity of organizational vision or
ideological homogeneity) will report experiencing conflict less frequently than those
homeowners’ associations who do not report sharing a common vision about the purpose
of the association (i.e., incongruity of organizational vision or ideological heterogeneity).
Data and Methods

Data

The primary data source for this chapter comes from an original survey of a sample of sitting Greater Boston-area homeowners' association board members.\(^{24}\) The Homeowners' Association Board Member Survey was mailed to board members of approximately 250 homeowners' associations in the spring of 2011 and consisted of a series of closed-ended questions which were designed to provide a description of the structural characteristics of the organization and its experiences with conflict.\(^{25}\) The 2011-2012 board membership directory of the New England Chapter of the Community Associations Institute (CAI-NE) provided the sampling frame for this study.\(^{26} \)\(^{27}\) Consistent with the survey methodology used in previous board member surveys, homeowners' association boards were randomly sampled and then a representative board member of each board was selected to complete the survey.\(^{28}\) Such a methodology has significant shortcomings, most notably its inability to capture the diversity of

\(^{24}\) The Greater Boston-area was selected because it represents the typical urban/suburban HOA setting: the state of Massachusetts, like most states, has virtually no homeowners' association laws. Some states, like Florida, Utah, and Colorado, are more regulated by state law.

\(^{25}\) All elements in the sample were mailed a hard-copy of the survey along with a cover letter and a return-addressed and postage-paid envelope. In the cover letter, respondents were also given the option of completing the survey online. Of those that completed the survey approximately 64% completed the mailed version while the other 36% completed the web version. A copy of the survey instrument can be found in Appendix A.

\(^{26}\) Homeowners' associations are not required to register with any state agency, so a complete list of all homeowners' associations in the Greater-Boston area (Essex, Middlesex, Norfolk, Plymouth, and Suffolk counties) was not available. The researcher recognizes that this creates a bias in the sample.

\(^{27}\) Approximately 700 homeowners' associations listed on CAI-NE's 2011-2012 membership roster were located in the Massachusetts counties chosen for inclusion in this study; 250 of them were randomly selected using probability sampling procedures for inclusion in this study.

\(^{28}\) If only one currently-serving board member was registered with CAI-NE, he/she was selected to participate by default, where more than one currently-serving board member was registered with CAI-NE random sampling procedures were used to select which board member would be selected to participate and included in the sample.
characteristics, attitudes, and experiences on the board. This methodology, however, is useful for obtaining objective information about structural and cultural characteristics of organizations, such as that which was collected here. The survey ultimately received a 71.6% response rate.

Measures

Dependent Variable

The primary purpose of this chapter is to test whether external or internal factors associated with "structural" and "cultural" explanations of conflict better predict the presence of intra-organizational conflict in a hybrid organization. To measure conflict I used responses given to the following survey question: Did your board and/or homeowners' association experience at least one significant instance of conflict (e.g., incompatibility, disagreement, or dissonance) in the last 12 months? Responses were binary (coded as 0 = no and 1 = yes). Descriptive statistics for the dependent variable are shown in Table 2.1. The mean response is 0.46, indicating that roughly half of the associations reported having experienced at least one significant instance of conflict in the last 12 months. Although this particular measure does not capture the degree or intensity of conflict, I argue that it is a sufficient measure for an initial explanatory study and captures the general scope and presence of conflict in homeowners' associations as it relates to organizational and board structures and culture.

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29 Significant was defined as an especially important, meaningful, memorable, or notable disagreement.
30 Previous research has shown that most organizational and board decisions are made fairly routinely and by near-unanimity (Polinard et al., 1994); therefore the presence of conflict is what is important to capture and a single more directed survey question about conflict would unlikely show significant variability in type, degree, or intensity. Additional questions and measures were used to indicate possible variability in the type, degree, or intensity of conflict.
Independent Variables

The independent variables included in this analysis follow directly from the external and internal factors discussed in the last section of the chapter. Data on all of the independent variables derive from responses to the Homeowners' Association Board Member Survey; descriptive statistics for all independent variables are shown in Table 2-1.

External measures of the complexity of the organizational environment stem from questions regarding the age, size, relative heterogeneity of the community, and availability of resources. Association age and size were measured with dummy variables (0 = young, 1 = middle-aged, and 2 = old) and (0 = small, 1 = medium, and 2 = large) respectively; young and small served as the reference categories.\(^\text{31}\)\(^\text{32}\) Community heterogeneity was measured as either “mostly similar/homogeneous” (coded 0) or “mostly dissimilar/heterogeneous” (coded 1). This measure relied on self-reported data from survey respondents who reported whether or not the social makeup (i.e., individual characteristics/demographics) of their community was mostly similar or dissimilar. Board member respondents were also asked whether or not their reserve fund contained sufficient available resources to pay for routine association maintenance, an “insufficient/few available resources” reply (coded 0) indicated that the association

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\(^31\) Respondents were originally provided with a series of ranges within which to report age (in years) and size (in units) of the association; they were later recoded to provide sufficient category sizes.

\(^32\) Categorical instead of continuous measures were used for both variables for reasons of category number and category size.
## Table 2-1: Homeowners' Association Board Member Survey Descriptive Statistics

<table>
<thead>
<tr>
<th>Variables</th>
<th>+/-</th>
<th>n</th>
<th>Mean</th>
<th>SD</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dependent variable</strong></td>
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<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Presence of conflict</td>
<td>n/a</td>
<td>179</td>
<td>0.46</td>
<td>0.49</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>Independent variables</strong></td>
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<td></td>
<td></td>
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<tr>
<td><strong>External factors</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complexity of environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age of community</td>
<td>-</td>
<td>179</td>
<td>1.11</td>
<td>0.68</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Size of community</td>
<td>+</td>
<td>179</td>
<td>0.91</td>
<td>0.84</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Community heterogeneity</td>
<td>+</td>
<td>179</td>
<td>0.58</td>
<td>0.49</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Availability of resources</td>
<td>-</td>
<td>179</td>
<td>0.53</td>
<td>0.50</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>Internal factors</strong></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Board composition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Size of board</td>
<td>+</td>
<td>179</td>
<td>0.97</td>
<td>0.67</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Length of term</td>
<td>-</td>
<td>179</td>
<td>0.59</td>
<td>0.49</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Type of management</td>
<td>+</td>
<td>179</td>
<td>0.76</td>
<td>0.42</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>Board practices</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information-sharing</td>
<td>-</td>
<td>179</td>
<td>0.76</td>
<td>0.42</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Attentiveness to rules</td>
<td>-</td>
<td>179</td>
<td>0.52</td>
<td>0.50</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Ideological homogeneity</td>
<td>-</td>
<td>179</td>
<td>0.18</td>
<td>0.38</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
lacked sufficient budgetary resources while a “sufficient/many available resources” reply (coded 1) indicated the association possessed sufficient budgetary resources.

Measures of all internal factors are also taken from survey responses and include measures of board structure and composition and board practices. The size of the board was measured with a dummy variable (0 = small, 1 = medium, and 2 = large). The reference category was small. Another measure of board composition was length of term of board members. Respondents were asked whether or not their board members frequently served short-terms or long-terms in office on the board. Short-term board length (coded 0), was defined as board terms of less than six years. Long-term board length (coded 1), was defined as board terms of six years or more. Type of management was measured as “self-managed/little structural differentiation” (coded 0) and “privately-managed/great structural differentiation” (coded 1).

Measures of board practices and organizational culture included questions regarding information-sharing, attentiveness to rules, and ideological homogeneity. Survey respondents were asked whether or not the board “regularly shared board meeting minutes and budgetary information” with homeowners; respondents answered “no/did not regularly share” (coded 0) or “yes/regularly shared” (coded 1). Board member respondents were also asked whether or not the association’s legal documents (Bylaws, CC&R’s, and Rules and Regulations) “regularly guided decision-making” with response choices of “no/infrequently” (coded 0) and “yes/frequently” (coded 1). Finally, respondents were also asked about the homogeneity or heterogeneity of board member

33 Respondents were originally provided with a series of ranges within which to report board size (total number of individuals serving on the board); it was later recoded to provide sufficient category sizes.
ideology. This question was intended to measure the possible presence of multiple institutional logics. Toward that end, survey respondents were asked whether or not board members regularly expressed a common vision about the purpose of the homeowners’ association during the decision-making process; respondents answered “no” (coded 0) or “yes” (coded 1). A response of “no” was taken to indicate incongruity of organizational vision and a response of “yes” was taken to indicate congruity of organizational vision.

Statistical Analysis

Logistic regression, being one special class of regression models, and as compared to linear regression, is well suited to explain relationships between a categorical outcome variable and a mixture of continuous and categorical predictors or just categorical predictor variables. Logistic and linear regression are both based on many of the same assumptions and theory; however, since the outcome is dichotomous in logistic regression, predicting unit change has little or no meaning. As an alternative to modeling the value of the outcome, logistic regression focuses instead upon the relative

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34 This variable is merely meant to indicate the possible presence of multiple institutional logics. I do not claim that this variable directly or fully measures institutional logics.
35 Analyzing a dichotomous dependent variable using linear regression would be inappropriate for two important reasons: 1) it violates the assumption of linearity in normal regression and 2) linear regression makes predictions that do not make sense for dichotomous dependent variables. To overcome the limitation in handling categorical variables, a number of alternative statistical techniques have been proposed. These include: logistic regression, discriminant function analysis, log-linear models, and linear probability models. Compared to the other three alternative techniques, logistic regression is superior because it 1) can accept both continuous and discrete predictors; 2) is not constrained by normality or equal variance/covariance assumptions for the residuals; and 3) is related to the discriminant function analysis through the Bayes theorem (Flury, 1997: 558). Furthermore, in terms of classification and prediction, logistic regression has been shown to produce fairly accurate results (Fan and Wang, 1999; Lei and Koehly, 2000; Peng et al, 2002).
probability (i.e., odds) of obtaining a given result category. This analysis used the logistic regression model and proceeded in three steps. The first step was to check the suitability of the data by examining descriptive statistics and doing preliminary tests on the potential explanatory variables. The second step was to fit logistic regression models predicting the occurrence of conflict in homeowners' associations. Three models were produced: one which included just the external factors, one which included just the internal factors, and one which included both external and internal factors. The third step was to perform a series of tests to assess the fit of each of the models.

**Results**

Three models were produced to assess the explanatory power of the "structural" and "cultural" explanations of conflict on hybrid organizations and to test the relative predictive power of external and internal organizational attributes associated with organizational and board structure and culture. These models used external and internal factors associated with both types of explanations to determine which explanation was best able to predict intra-organizational conflict in homeowners' associations. Model (1) includes only external organizational attributes. Model (2) includes only internal organizational attributes. Model (3) includes all of the external and internal factors associated with both the "structural" and "cultural" explanations of conflict. Table 2-2 displays all three models and summarizes the effects of all external and internal factors on the outcome variable.

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36 The `logit` command in Stata, the statistical program used in this analysis, yields the logit coefficient, while the `logistic` command yields odds ratios. The odds ratios will be reported in the Discussion section; coefficients are reported in Table 2-2.

37 Post-estimation logistic regression diagnostics, including tests of specification, goodness-of-fit, multicollinearity, were performed to assess the validity of all three models.
Table 2-2: Logistic Regression Predicting Intra-Organizational Conflict in Homeowners’ Associations

<table>
<thead>
<tr>
<th></th>
<th>Model (1)</th>
<th>Model (2)</th>
<th>Model (3)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>External Only</td>
<td>Internal Only</td>
<td>External &amp; Internal</td>
</tr>
<tr>
<td><strong>External factors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complexity of environment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle-aged</td>
<td>0.038</td>
<td>0.016</td>
<td></td>
</tr>
<tr>
<td>Old</td>
<td>0.366</td>
<td>1.074</td>
<td></td>
</tr>
<tr>
<td>Size</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium</td>
<td>1.465</td>
<td>0.991</td>
<td></td>
</tr>
<tr>
<td>Large</td>
<td>1.257</td>
<td>1.530</td>
<td></td>
</tr>
<tr>
<td>Community heterogeneity</td>
<td>0.310</td>
<td>-0.336</td>
<td></td>
</tr>
<tr>
<td>Availability of resources</td>
<td>-0.141</td>
<td>0.203</td>
<td></td>
</tr>
<tr>
<td><strong>Internal factors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board composition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Size of board</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium</td>
<td>0.570</td>
<td>0.106</td>
<td>0.681</td>
</tr>
<tr>
<td>Large</td>
<td>0.110</td>
<td>-1.794</td>
<td>-0.729</td>
</tr>
<tr>
<td>Length of term</td>
<td>-0.296</td>
<td>-0.396</td>
<td></td>
</tr>
<tr>
<td>Type of management</td>
<td>0.669</td>
<td>-0.329</td>
<td></td>
</tr>
<tr>
<td>Board practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information-sharing</td>
<td>0.355</td>
<td>0.681</td>
<td></td>
</tr>
<tr>
<td>Attentiveness to rules</td>
<td>-0.201</td>
<td>-0.729</td>
<td></td>
</tr>
<tr>
<td>Ideological homogeneity</td>
<td>-1.026</td>
<td>-2.596</td>
<td></td>
</tr>
<tr>
<td><strong>Constant</strong></td>
<td>-0.676</td>
<td>-0.312</td>
<td>-1.701</td>
</tr>
<tr>
<td><strong>Observations</strong></td>
<td>179</td>
<td>179</td>
<td>179</td>
</tr>
<tr>
<td><strong>Pseudo R-squared</strong></td>
<td>0.079</td>
<td>0.064</td>
<td>0.185</td>
</tr>
</tbody>
</table>

Absolute value of z-statistics in parentheses

* p < 0.05, ** p < 0.01
External Factors and Presence of Conflict

Model (1) includes only external factors; all of these factors are associated with "structural" explanations of conflict. Previous research in the area identified four important measures of the complexity of the organizational environment (organization age, organization size, community heterogeneity, and availability of resources). Of the four external measures hypothesized to predict intra-organizational conflict in private, nonprofit, and public organizations, only one was shown to significantly predict conflict in homeowners' associations: organization size.

When controlling for other external factors associated with structural explanations of conflict, homeowners' associations of a medium and large size are expected to have four and three times the odds of experiencing a significant instance of conflict when compared to homeowners' associations of a small size. Both findings are statistically significant (p < 0.01) suggesting that there is a positive relationship between organization size and the presence of conflict that is not due to chance alone. The fairly wide confidence interval, however, indicates some variability and leaves open the possibility that other variables may impact this relationship. This relationship is consistent with the literature and confirms the hypothesis that larger homeowners' associations will report having experienced conflict more frequently than smaller homeowners' associations.

The three other external predictor variables included in this model and associated with structural explanations of conflict, age, community heterogeneity, and availability of resources, were not shown to have a statistically significant association with the dependent variable and, in some cases, did not vary as expected. Although the effects are
weak and not statistically significant, the data indicate that middle-aged and older homeowners’ associations will have greater odds of conflict than younger homeowners’ associations; more heterogeneous (i.e., dissimilar) homeowners’ associations will have greater odds of conflict that mostly homogeneous (i.e., similar) homeowners’ associations; and homeowners’ associations with insufficient reserve funds (i.e., fewer available resources) will have greater odds of conflict than those homeowners’ associations have sufficient reserve funds (i.e., greater available resources). The lack of explanatory power of these variables is largely inconsistent with the bulk of literature on organizational and board conflict which suggests that variables associated with greater complexity in the organizational structure and its external environment will consistently and strongly predict intra-organizational conflict in private, nonprofit, and public organizations.

Internal Factors and Presence of Conflict

Model (2) includes only internal factors including measures of board structure and composition and board practices; this model thus contains factors consistent with both structural and cultural explanations of conflict. Of the six internal variables (board size, length of board term, type of management, information-sharing practices, attentiveness to rules, and ideological homogeneity), drawn from the literature and hypothesized to predict conflict in private, nonprofit, public, and hybrid organizations, two were shown to significantly predict conflict in homeowners’ associations: type of management and ideological homogeneity.
When controlling for other internal factors associated with "structural" and "cultural" explanations of conflict, homeowners' associations who report being more structurally differentiated (i.e., hiring a contract manager or management company) are expected to have nearly two times the odds of experiencing a significant instance of conflict when compared to homeowners' associations who report being less structurally differentiated (i.e., self-managed). This finding is statistically significant ($p < 0.05$), initially suggesting that there is a positive relationship between type of management and the presence of conflict that is not due to chance alone. This relationship is ultimately rendered insignificant, however, because the 95% confidence interval contains the null value. Thus, the null hypothesis cannot be rejected because there is not enough support to make the claim that the odds of experiencing conflict are significantly different for more and less structurally differentiated organizations.

There is a negative association between ideological homogeneity and the presence of conflict: when controlling for other internal factors associated with "structural" and "cultural" explanations of conflict, those homeowners' associations who report sharing a common vision about the purpose of a homeowners' association are less likely to experience a significant instance of conflict when compared to those homeowners' who do not report sharing a common vision about the purpose of a homeowners' association. The odds of conflict decrease as ideological homogeneity increases. This is a statistically significant relationship ($p < 0.01$) and the factor of change is 0.35. The strong statistical significance of this relationship suggests that there is a relationship between ideological
homogeneity and the presence of conflict that is not due to chance alone, and the narrow confidence interval indicates that there is little variability in this relationship.\(^\text{38}\)

The four other internal predictor variables associated with \textit{structural} and \textit{cultural} explanations of conflict and included in this model, board size, length of board term, information-sharing practices, and attentiveness to rules, are not shown to have a statistically significant association with the outcome variable and some did not vary as expected. Although the effects are weak and not statistically significant, the data indicate that homeowners' associations with larger board sizes, shorter term lengths, more regular information-sharing practices, and more frequent following of rules have greater odds of experiencing conflict when compared to homeowners' associations with smaller board sizes, longer term lengths, less regular information-sharing practices, and less frequent following of rules respectively. The lack of explanatory power of these variables is largely inconsistent with much recent literature on organizational and board conflict which suggests that variables associated with internal organizational structures like board structure and composition and organizational practices like institutional decisions will significantly predict intra-organizational conflict in private, nonprofit, public, and hybrid organizations.

\textit{External and Internal Factors and Presence of Conflict}

Model (3) includes all of the external (measures of environmental complexity) and internal (measures of board structure and composition and board practices) factors

\(^{38}\) With such a relationship there is the potential for reverse causality (i.e., did ideological homogeneity cause conflict or did conflict cause ideological homogeneity). At this time, I can show that there is a correlative relationship between ideological homogeneity and the presence of intra-organizational conflict. In the next two chapters I will more fully develop the relationship between these two variables through the collection and analysis of qualitative data.
associated with both the "structural" and "cultural" explanations of conflict. Of the ten variables included in this model (organization age, organization size, community heterogeneity, availability of resources, board size, length of board term, type of management, information-sharing practices, attentiveness to rules, and ideological homogeneity), two variables (one external and one internal) associated with structural explanations of conflict and two variables (both internal) associated with cultural explanations of conflict are shown to significantly predict conflict in homeowners' associations. The statistically significant factors associated with structural explanations of conflict include organization size (external) and board size (internal). The statistically significant factors associated with cultural explanations of conflict include attentiveness to rules (internal) and ideological homogeneity (internal). The most statistically determinant is found to be an internal and cultural factor, ideological homogeneity.

When controlling for other external and internal factors associated with both structural and cultural explanations of conflict, homeowners' associations of a large size are expected to have nearly five times the odds of experiencing a significant instance of conflict when compared to homeowners' associations of a small size. This finding is statistically significant ($p < 0.05$) suggesting that there is a relationship between organization size and the presence of conflict that is not due to chance alone, however, the confidence interval is fairly wide indicating more variability and the possibility that other variables may impact this relationship. This finding is consistent with the literature which supports the notion that size is associated with intra-organizational conflict, but cautions that other variables may mediate the relationship. Organizational heterogeneity
was not shown to be significantly related to the presence of conflict and did not vary as expected; this is a significant departure from the literature which often sees organizational size and heterogeneity as related phenomenon.

There is a negative association between board size and the presence of conflict: when controlling for other external and internal factors associated with both structural and cultural explanations of conflict, those homeowners' associations who report having a large-size board are less likely to experience a significant instance of conflict when compared to homeowners' associations who report having a small-size board. The odds of conflict decrease as board size increases. This is a statistically significant relationship ($p < 0.05$) and the factor of change is 0.16. The level of statistical significance coupled with the relatively narrow confidence interval suggests that there is a relationship between board size and the presence of conflict that is not due to chance alone and that there is little variability in this relationship.

Internal and cultural factors, those factors that derive from institutional beliefs, choices, practices, and manners of governance, were also shown to be significantly related to the presence of conflict in homeowners' associations. The two internal and cultural factors that were found to be statistically significant predictors of intra-organizational conflict in homeowners' associations were attentiveness to rules and ideological homogeneity.

Attentiveness to rules, a measure of organizational control and a manner of governance, was found to have a negative association with intra-organizational conflict. When controlling for other external and internal factors associated with both structural
and cultural explanations of conflict, those homeowners' associations who report frequently adhering to the legal documents (Bylaws, CC&R's, and Rules and Regulations) of the association in their decision-making process are less likely to experience a significant instance of conflict when compared to homeowners' associations who do not report frequently adhering to the legal documents (Bylaws, CC&R's, and Rules and Regulations) of the association in their decision-making process. This is a statistically significant finding (p < 0.05) and the factor of change is 0.48. This finding is consistent with organizational literature which suggests that organizational control may be related to conflict and other governance variables. This relationship, however, is ultimately rendered statistically insignificant because the confidence interval includes the null value; therefore there is not enough support to make the claim that the odds of experiencing conflict are significantly different for homeowners' associations who are less and more attentive to rules.

The most statistically significant predictor of intra-organizational conflict in homeowners' associations in this model is ideological homogeneity. There is a negative association: when controlling for other external and internal factors associated with both structural and cultural explanations of conflict, those homeowners' associations who report sharing a common vision about the purpose of a homeowners' association are less likely to experience a significant instance of conflict when compared to those homeowners' associations who do not report sharing a common vision about the purpose of a homeowners' association. The odds of conflict decrease as ideological homogeneity increases. This is a statistically significant relationship (p < 0.01) and the factor of change
is 0.36. The strong statistical significance of this relationship suggests that there is a relationship between ideological homogeneity and the presence of conflict that is not due to chance alone, and the narrow confidence interval indicates that there is little variability in this relationship. This result is consistent with the literature which suggests that group value consensus and congruity of organizational vision is a predictor of conflict.\footnote{As mentioned in Footnote 38 with such a relationship there is the potential for reverse causality. At this time, I can show that there is a correlative relationship between ideological homogeneity and the presence of intra-organizational conflict. In the next two chapters I will more fully develop the relationship between these two variables through the collection and analysis of qualitative data.}

The other predictor variables included in this model (age, community heterogeneity, availability of resources, length of board term, type of management, and information-sharing practices) are not shown to have a statistically significant association with the outcome variable and some did not vary as expected. Although the effects are weak and not statistically significant, the data indicate that older, more homogeneous, more financially sufficient homeowners’ associations and homeowners’ associations with shorter term lengths, less structural differentiation, less regular information-sharing practices have greater odds of conflict than younger, more heterogeneous, less financially sufficient homeowners’ associations and homeowners’ associations with longer term lengths, more structural differentiation, and more regular information-sharing practices respectively. The lack of explanatory power of these variables is largely inconsistent with the bulk of literature on organizational and board conflict which suggests that variables associated with organizational structure and culture will strongly predict intra-organizational conflict in private, nonprofit, and public, and hybrid organizations.
Structural v. Cultural Explanations of Conflict

The primary aim of this chapter was to assess the explanatory power of the "structural" and "cultural" explanations of conflict in hybrid organizations by testing the predictive power of external and internal organizational attributes associated with both explanations on the presence of intra-organizational conflict in homeowners' associations. Understanding the sources of conflict and whether external (structural) or internal (structural or cultural) determinants of conflict can predict the presence of conflict in a hybrid organization is a step toward understanding a new type of organizational form and choosing organizational and institutional structures and practices that help reduce it or mitigate its negative effects on governance quality and organizational performance. This chapter identifies several important predictive characteristics of intra-organizational conflict in homeowners' associations, but concludes that purely external or structural explanations of conflict are incomplete and insufficient for explaining the presence of intra-organizational conflict in a hybrid organization. The outcome of this research highlights the need for internal and cultural explanations of conflict and more research into how multiple, and potentially competing, institutional logics may impact the presence of significant intra-organizational conflict in hybrid organizations.

External Expectations and Explanations

Organization size is the only external and structural factor that is found to be significantly associated with the presence of intra-organizational conflict in homeowners' associations in the External Only Model (Model 1) and the External and Internal Model
(Model 3). The other external and structural measures hypothesized to predict intra-organizational conflict in private, nonprofit, and public organizations, including organization age, community heterogeneity, and availability of resources, are found to be statistically insignificant predictors in both models suggesting that these variables are either poor measures of intra-organizational conflict in hybrid organizations like homeowners’ associations or that other factors are implicated in the relationship between these variables and organizational and board conflict in hybrid organizations.

Organization size is found to be a statistically significant predictor in both the External Only (Model 1) and the External and Internal Model (Model 3) and varied as expected based on the literature. It makes logical sense that larger organizations would have greater odds of experiencing conflict due to increasing complexity and multiplicity in the organizational environment. The statistical significance of organization size decreased from Model (1) to Model (3) as more variables were added to the model. This is to be somewhat expected, but while the difference between small-size and medium-size organizations is no longer statistically significant, the difference between small-size and large-size organizations remains statistically significant in the full model suggesting that to some extent organization size is a valid predictor of intra-organizational conflict.

Community heterogeneity is not found to be a statistically significant predictor of intra-organizational conflict in Models (1) or (3), and, surprisingly, did not vary as suggested by the literature in Model (3). A bulk of literature suggests that organizational size and heterogeneity are related phenomenon (Beck and Betz, 1975) and further that increasing organizational size and organizational heterogeneity in tandem will lead to
increasing organizational conflict (Carroll and Harrison, 1998; Haveman, 1995; Hearn and Anderson, 2002). It seemed likely then that those homeowners’ associations who reported their communities were “mostly heterogeneous (dissimilar)” as opposed to “mostly homogenous (similar)” would more frequently report the presence of conflict. The data presented in Model (3), although weak and not statistically significant, indicates the opposite: that those communities who reported being more dissimilar/heterogeneous had decreased odds of experiencing a significant instance of conflict than those homeowners’ association communities who reported being more similar/homogeneous. This is a surprising suggestion mainly because it does not comply with theoretical expectation; its impact is tempered, however, by the acknowledgement that homeowners’ association communities, perhaps more so than other organizations, are more likely to draw together people with similar, rather than dissimilar, demographic characteristics (e.g., financial and social positions). Thus, the incorrect expectation for this variable may be due to poor and/or imprecise measurement; the question as it was asked may not have been able to tease out the more nuanced differences between community members which may make them more dissimilar and susceptible to conflict. In future studies, the Blau index of variability (Blau, 1977) may be a better suited measure to address the multidimensional nature of heterogeneity.

Organization age and availability of resources are also found to be weak and statistically insignificant in both the External Only Model (Model 1) and the External and Internal Model (Model 3). The data indicates that organization age did vary as expected in both models (middle-aged and older homeowners’ associations have greater odds of
conflict when compared to younger homeowners’ associations); however, availability of resources did not. In the External Only Model (Model 1) homeowners’ associations with fewer available resources have greater odds of conflict, while in the External and Internal Model (Model 3) homeowners’ associations with greater available resources have greater odds of conflict. This finding suggests that the internal variables may interact with this variable, or that other factors are implicated in the relationship between this variable and organizational conflict. Collectively, the lack of explanatory power provided by organization age, community heterogeneity, and availability of resources, especially in the full model (Model 3), strongly suggests that purely structural or external explanations of conflict may not be sufficient for explaining intra-organizational conflict in all types of organizations, particularly hybrid organizations like homeowners’ associations.

**Internal Expectations and Explanations**

Four internal factors in the Internal Only Model (Model 2) and External and Internal Model (Model 3) were found to be significantly associated with greater intra-organizational conflict in homeowners’ associations, including type of management (structural factor), board size (structural factor), attentiveness to rules (cultural factor), and ideological homogeneity (cultural factor). The two remaining internal factors, length of term (structural factor) and information-sharing practices (cultural factor), were not found to be statistically significant predictors of the presence of conflict in homeowners’ associations in either model. The relative number of statistically significant internal and cultural predictors and their relative robustness indicates that understanding the role of a hybrid organization’s institutional beliefs, choices, practices, and manners of governance
is important to comprehending the presence of intra-organizational conflict in a hybrid organization.

Type of management, an internal and structural factor, is found to be a statistically significant predictor of intra-organizational conflict in the Internal Only Model (Model 2). Based on the previous literature (March and Simon, 1958), I expected that more structurally differentiated organizations (i.e., those that employed a professional manager or management company) would be more likely to report experiencing conflict than those that reported less structural differentiation (i.e., self-management). The data presented in Model (2) confirm this expectation; however, the relationship is ultimately rendered statistically insignificant because the confidence interval contains the null value. Interestingly, the opposite relationship is found to be true in the External and Internal Model (Model 3). Although the relationship is weak and type of management is not found to be a meaningful predictor, this model suggests that more structurally differentiated homeowners’ associations (i.e., professionally managed) have decreased odds of experiencing a significant instance of conflict when compared to less structurally differentiated homeowners’ associations (i.e., self-managed). The sign change from the partial model to the full model indicates that external factors may mediate the relationship between type of management and intra-organizational conflict.

This study finds a negative association between board size, an internal and structural factor, and the presence of conflict in the External and Internal Model (Model 3) when it expected a positive association. Previous research has demonstrated that larger governing bodies or groups may experience elevated levels of conflict because of the
necessity to aggregate the preferences of more decision-makers (Pelled, Eisenhardt, and Xin, 1999; Grissom, 2010). This study, however, finds that compared to homeowners’ association who reported having a small board size, those homeowners’ associations who reported having a large board size have decreased odds of experiencing a significant instance of conflict. This finding suggests that the presence of more decision-makers may actually be beneficial in a hybrid organization. Martirossian’s (2001) research on homeowners’ associations and Cox’s (2003) study of nurses similarly suggest that larger groups were less conflicted, and while Cox was unable to identify why this was true, Martirossian argues that larger board sizes may have less conflict because there is less pressure for conformity and more expectation for debate.

Homeowners’ associations who report frequently adhering to the legal documents (Bylaws, CC&Rs, and Rules and Regulations) of the association in their decision-making process are less likely to experience a significant instance of conflict when compared to homeowners’ associations who do not report frequently adhering to the legal documents of the association in their decision-making process. A similar direction of association is found in both models, but attentiveness to rules, an internal and cultural factor, is only found to be a significant predictor of intra-organizational conflict in the External and Internal Model (Model 3). This relationship, however, is ultimately rendered insignificant and the null hypothesis cannot be rejected. Still, the implication that organizational control, via the mechanism of attentiveness to rules, may be implicated in the presence of intra-organizational conflict in homeowners’ associations is consistent
with Kahn\^\(\text{\textcopyright}1964\) study of corporations which found that organizational conflict was highest where there was low emphasis on rules.

Ideological homogeneity is found to be the most statistically significant predictor of intra-organizational conflict in homeowners\^\(\text{\textcopyright}\) associations in the Internal Only Model (Model 2) and the External and Internal Model (Model 3), suggesting that there is, at the very least, a correlative relationship between ideological homogeneity and the presence of intra-organizational conflict, and, perhaps, a causal relationship between the two variables.\(^{40}\) The statistical significance of ideological homogeneity maintains over both models, significantly reducing the concern that this result might be driven by some other factor.\(^{41}\) The measure of ideological homogeneity is used in this analysis to indicate the possible presence of multiple institutional logics. Institutional theory implies that organizational members, especially leaders and decision-makers, play an important role in shaping organizational responses to multiple and potentially competing institutional logics; however, the extent and implications of the role of organizational members\^\(\text{\textcopyright}\) interests in shaping responses to conflicting institutional demands remains poorly understood (Pache, 2011; Jarzabkowski, Matthiesen, and Van De Ven, 2009; Kraatz & Block, 2008; Kraatz & Moore, 2002). This research, although preliminary and limited in scope, indicates that at least one of the implications of multiple institutional rationales

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\(^{40}\) As I have indicated previously, at this time I can only claim a correlative relationship between ideological homogeneity and the presence of intra-organizational conflict. In the next two chapters I will more fully develop the relationship between these two variables through the collection and analysis of qualitative data.

\(^{41}\) Indeed, in additional statistical models that evaluate organizational attributes associated with only structural explanations of conflict and cultural explanations of conflict, ideological homogeneity is consistently the most statistically significant predictor of intra-organizational conflict in homeowners\^\(\text{\textcopyright}\) associations. This outcome bolsters the suggestion that cultural explanations of conflict may be better suited for hybrid organizations like homeowners\^\(\text{\textcopyright}\) associations.
and demands is the presence of significant intra-organizational conflict. This finding echoes previous research in the area which finds that private, non-profit, and public boards and organizations that are made up of members with diverse ideological preferences are likely to face greater difficulties in working out their collective preferences (Grissom, 2010; Cornforth, 2001; Golden-Biddle and Rao, 1997).

The relative robustness of ideological homogeneity as a predictor of intra-organizational conflict underlines the importance of understanding the internal and cultural dimensions of hybrid organizations. It may be especially important to understand the internal and cultural dimensions of hybrid organizations for several reasons. First, there is a greater potential for members of hybrid organizations to have competing and incongruous organizational visions, values, expectations, and rationales for action because of the institutionally complex nature of these organizations. To that point, the majority homeowners' association board members surveyed (approximately 80%) report not sharing a common vision about the purpose of homeowners' associations. Second, hybrid organizations, unlike other types of organizations, face the unique problem of defining organizational purpose. Organizational purpose is often ingenerate in non-hybrid organizations; for example, the purpose of a corporation is to earn money and the purpose of a non-profit organization is to serve the community; so while intra-organizational conflict may emerge from any number of structural or cultural conditions in these organizations it is less likely to emerge from problems regarding a shared vision about the purpose of the organization. Third, to some extent a shared vision is something that is under the control of organizational members; it is not like an external structural
condition that must be taken as a given—there is agency. Individual agency may be embedded in an institutional structure, however, there is likely to be interplay between the two. Insofar as this is true, the internal dimensions of a hybrid organization and its organizational culture may take on special importance as it is the place where board members, and other organizational members, construct and re-construct the notion of organizational purpose.

Overall, internal and cultural factors are found to better predict the presence of intra-organizational conflict in a hybrid organization such as a homeowners’ association. This is especially reflective in the relative number of important internal and cultural predictors in the External and Internal Model (Model 3), which is the most statistically robust of the three models produced in this analysis. Further, ideological homogeneity emerged as the key predictor of intra-organizational conflict, a somewhat surprising finding given the number of studies which identify organizational and board structure, rather than culture, as the significant predictor of conflict in private organizations (Wall and Callister, 1995; Pfeffer, 1972), non-profit organizations (Cornforth, 2001; Brown, 2005), and public organizations (Grissom, 2010; Kochan, Huber, and Cummings, 1975).

**Summary and Conclusion**

The findings presented in this chapter imply that some amount of conflict is endemic in organizations—all types of organizations. That is, some degree of conflict is bound to arise from the macro-structural characteristics of an organization itself, particularly from external and structural characteristics like size which must be taken as a given. Yet the results also show that several factors associated with greater conflict are
under the purview of the board and organizational members themselves and thus can be addressed, and potentially minimized, by the institutional choices of the organization. For example, the results strongly suggest that sharing a common vision may help the overall functioning and performance of the organization. This may be particularly true in hybrid organizations like homeowners' associations who must manage multi-sector institutional demands. These unexpected findings coupled with the relative robustness of ideological homogeneity as a predictor of intra-organizational conflict is compelling evidence of not only the empirical existence of multiple institutional logics in hybrid organizations, but also of the problem of applying traditional structural explanations and measures of conflict to hybrid organizations. I conclude then, that structural explanations of conflict are incomplete and insufficient for explaining intra-organizational conflict in a hybrid organization. Because of its mixed organizational structure, predicting conflict in a hybrid organization may be more difficult, and may require a more qualitative examination of its culture (i.e., the interests, identities, values, and assumptions) and its members' action-logics.

In the next chapter I will build upon the findings of this chapter to more fully explore the relationship between ideological homogeneity and the presence of intra-organizational conflict in homeowners' associations. I will seek to qualitatively conclude whether there are multiple institutional logics present in homeowners' associations and, if there are, to identify and define what institutional logics are present, explain where they derive from, and explore how and why they may cause intra-organizational conflict in homeowners' associations.
CHAPTER THREE: IDENTIFYING, EXPLAINING, AND DEFINING THE LOGICS OF HOMEOWNERSHIP

Introduction

Institutional pluralism is "the situation faced by an organization that operates within multiple institutional spheres" (Kraatz and Block, 2008: 243). Institutional theory presumes that a hybrid organization, by nature of its organizational form, exists in an institutionally pluralistic environment and thus is subject to multiple regulatory regimes, embedded within multiple normative orders, and/or constituted by more than one cultural logic (Kraatz and Block, 2008: 243). These regimes, orders, or logics are imposed upon the organization by the broader institutional environment and are believed to generate persistent and deep-rooted tensions within the organization (Kraatz and Block, 2008: 243). But while previous research has uncovered a vast swath of organizations existing in institutionally pluralistic environments, few of these studies have explicitly identified the sources of these regimes, orders, or logics, explained their existence, and defined the nature of their influence on the organizational actors whom reside within these organizations. How do these regimes, orders, or logics become present and/or accessible in an organization and how are they enacted in the everyday beliefs, decisions and activities of organizational actors?

This chapter confirms the hybrid organizational form of homeowners' associations by identifying and explaining the existence of multiple institutional logics in homeowners' associations. It builds upon the suggestion of the last chapter that multiple institutional logics are present in homeowners' associations and draws upon qualitative
interviews with homeowners’ association board members in Massachusetts, observations of homeowners’ associations, and textual analysis of homeowners’ association documents to identify, explain, and define the existence of two institutional logics in the hybrid institutional environment of homeowners’ associations: an economic logic and a social logic. The economic logic of homeownership views homeownership as a financial investment and appeals to an individual’s pursuit of self-interest. The social logic of homeownership views homeownership as a civil investment and appeals to a collective’s pursuit of community. I argue that the American history and ideology of homeownership generates and institutionalizes these logics and that institutional complexity results from the problematic intersection of the American history and ideology of homeownership and homeowners’ associations’ hybrid organizational form. Homeowners’ associations and their organizational actors’ cultural embeddedness in the American history and ideology of homeownership generates conflicting visions about the purpose of homeownership, the nature of the identity of homeowner, and the purpose of a homeowners’ association.

**Institutional Pluralism in Hybrid Organizations**

Institutional theory suggests that institutional environments provide meaning and stability to social behavior, shaping and constraining organizational actions. Institutional influences are imposed and exerted on organizations through rules and regulations, normative prescriptions, and social expectations (Scott, 2001). They are also communicated through institutional logics (Thornton, 2004; Thornton and Ocasio, 2008; Thornton, Ocasio, and Lounsbury, 2012). The operation of organizations in multiple social sectors creates pluralistic (Kraatz and Block, 2008) institutional environments
and the opportunity for organizations to interface with multiple institutional logics. The following sections explore the theoretical foundations of the institutional logics perspective and the organizational implications of institutional pluralism.

_Institutional Logics_

As I explained in the introductory chapter of this manuscript, institutional logics shape the “rules of the game” (Thornton and Ocasio, 2008: 112) and provide organizational actors with cultural templates and organizing principles (Friedland and Alford, 1987, 1991). They are the practices, beliefs, and rules which guide an institutional order and provide organizational actors with sets of expected goals and modes of action. Logics emerge from the seven major social institutions of society (the family, the community, religion, the state, the market, the professions, and the corporation) and represent a different cultural belief system or worldview which encompasses a way of thinking about one’s environment that links purpose and process, means and ends, and helps organizational actors to interpret and assign meanings to organizational behavior (Thornton, Ocasio, and Lounsbury, 2012). Institutional logics are available to individuals, groups, and organizations to further elaborate and use to their own advantage (Thornton and Ocasio, 2008). As such, institutional logics are embodied in practices and sustained and reproduced by cultural assumptions and political struggles (Thornton and Ocasio, 2008).

Thornton and Ocasio (2008) advance a meta-theory of the institutional logics approach by identifying five elements of the approach that provide clarity into Friedland

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42 For a full summary of the seven institutional orders proposed by Thornton, Ocasio, and Lounsbury (2012) see Table 1-1 in Chapter One: Introduction.
and Alford’s (1987, 1991) institutional logics construct. First, society should be understood as an *inter*-institutional system comprising the seven theoretically distinct social institutions identified above. Second, social action is culturally embedded in institutional logics. Third, institutional logics have both material and cultural components. Fourth, this perspective is relevant to multiple levels of analysis. And fifth, institutional logics are historically situated and contingent to a particular spatial and temporal setting. Hence, the main functions of institutional logics are to define what an institution means, focus the attention of key decision-makers, and to provide key decision-makers with a set of associated perceptions and practices. These qualities make institutional logics observable in the concrete social relations of actors who utilize, manipulate, and reinterpret them.

*Institutional Pluralism*

Institutional pluralism refers to situations whereby an organization *operates within multiple institutional spheres* or is marked by the presence of more than one dominating institutional logic (Kraatz and Block, 2008: 243-244). To date, much of institutional theory has been focused on explaining the role that dominant institutional logics play in promoting institutional conformity within fields and organizations (Tracey et al., 2011). This is because institutional theory frames organizations as *entities reproducing a single coherent institutional template in order to gain legitimacy and secure support from external institutional referents* (Pache and Santos, 2012: 975). Isomorphism in pursuit of institutional legitimacy is a core assumption of institutional
theory. In this context, institutional pluralism is inherently problematic because it complicates the institutional template by promulgating multiple “rules of the game.”

Scholarship in this area has traditionally framed institutional pluralism as a problematic, but transitory, stage of organizational change. Institutional pluralism is believed to generate incompatible and contradictory prescriptions for organizational action (Greenwood et al., 2011), as well as conflict and contestation among groups that profess allegiances to different institutional logics as they jockey for control of an organization (Kraatz and Block, 2008; Marquis and Lounsbury, 2007). It is for this reason that institutional pluralism came to indicate a transitional stage marking organizational change; consequently, contradictions among institutional orders have alternately been characterized as a “period effect,” a “jolt,” or a “shift” as organizations move from a dominant logic to another (Meyer, 1982; Dunn and Jones, 2010) and situations of institutional pluralism as full of “turmoil” (Hallet, 2010: 52), “threats” (Jarzabkowski et al., 2009: 306), and “uneasiness” (Reay and Hinings, 2005: 364).

Recently, however, it has been suggested that multiple institutional pressures on organizations may be a more lasting and sustained phenomenon and that institutional pluralism can exist in permanence. This is especially true for hybrid organizations, like homeowners’ associations, which operate in or combine different characteristics of more than one social sector of society and thus may be conceptualized as permanent or semi-permanent carriers of multiple institutional logics. Homeowners’ associations exist at the intersection of the three main social sectors of society (private, public, and non-profit) and thus may draw institutional orders from each of these three sectors. McKenzie (2003,
1994) comments on their tendency to draw upon the incentives and characteristics of multiple social sectors: “Owners who serve as board members are influenced by market incentives when they contemplate using association funds in ways that advance their economic interests. They are at least quasi-state actors when they administer what would otherwise be municipal services and enforce rules. Further when board members see themselves as volunteers donating considerable time to their community to make it a better place to live, they are thinking like civil society actors (2003: 219). Homeowners’ associations, while unique, are not an exceptional case. Trade unions, healthcare organizations, public schools, and non-profit organizations are among those organizations who are increasingly finding themselves in environments where multiple, and potentially conflicting, institutional logics are an everyday part of their organizational template.43 Studies in this area often highlight the difficulty organizations face in meeting expectations, because “to comply with one set of demands requires them to defy a competing set” (Pache, 2011; Pache and Santos, 2010; Pfeffer and Salancik, 1978). This stream of research focuses on the nature of “embedded agency” (Thornton and Ocasio, 2008) and “strategic choice” (Clemons and Cook, 1999; Dorado, 2005; Pache and Santos, 2010; Greenwood et al., 2011; Tracey, Phillips, and Jarvis, 2011; Pache, 2011) on the part of organizational actors who, in the context of institutional pluralism, have the ability

43 Indeed, prior empirical research has uncovered numerous instances of organizations existing in institutional environments which appear to impose pluralism. These include hospitals (D’Aunno, Succi, and Alexander, 2000; Denis, Lamothe, and Langley, 2001; neo-natal intensive care units (Heimer, 1999), rape crisis centers (Zilber, 2002), drug treatment centers (D’Aunno et al., 1991), non-profit and public organizations (Brunsson, 1989; Dutton and Dukerich, 1991; Stone and Brush, 1996), universities (Cohen and March, 1986; Albert and Whetten, 1985), public schools (Rowan, 1982), public broadcasters (Powell, 1988), arts organizations (Mouritsen and Skaerbaek, 1995; Alexander, 1996), computer firms (Hung and Whittington, 1997), multi-national firms (Kostova and Zaheer, 1999), and small businesses (Pickle and Friedlander, 1967).
to access multiple institutional logics and whom shape organizational responses to institutional pluralism.

Thornton, Ocasio, and Lounsbury (2012) theoretically advance this stream of research in their recent synthesis of the institutional logics perspective. They offer a new theory which furthers their meta-theory of the institutional logics perspective and appeals to deeper understandings of the micro-foundations of the institutional logics perspective and the relationship between micro- and meso-levels of analysis (individuals and organizations), in addition to other cross-level relationships between the micro and macro (individuals and society), meso and macro (organizations and fields), meso and macro (fields and society) levels of analysis. Their elaboration of micro-mechanisms is meant to account for the ways in which institutional logics both enable and constrain an actor’s agency, thereby undoing the supposed “paradox of embedded agency” (Holm, 1995: 398 in Thornton, Ocasio, and Lounsbury, 2012: 82). Thornton, Ocasio, and Lounsbury’s (2012: 80) central micro-mechanism to undo this paradox is “bounded intentionality.” Bounded intentionality refers to the ways in which an individual is culturally embedded in a social group with which they identify, that affords them not only an identity to which they are emotionally committed, but also a cognitive schema that focuses their attention on particular features of organizations and their environments, conditions their interests

44 Within institutional theory there is a long-standing structure/agency debate that is often referred to as the “paradox of embedded agency” (Powell and DiMaggio, 1991; Friedland and Alford, 1991; Sewell, 1992; Holm, 1995; Seo and Creed, 2002). The paradox refers to the following theoretical puzzle: if actors are embedded in an institutional field and subject to regulative, normative, and cognitive processes that structure their cognitions, define their interests, and produce their identities (Friedland and Alford, 1991; Clemens and Cook, 1999), how are they able to envision new practices and then subsequently get others to adopt them? In short, how can actors shape institutions if their actions, intentions, and rationality are all conditioned by the very institution they wish to change?
and goals, and provides them a distinctive repertoire of practices presumed to attain them (Thornton, Ocasio, and Lounsbury, 2012: 79-81, 86-91). The three main features of bounded intentionality—social identity, goals, and cognitive limitations—are situated in time and place. The context (what Thornton, Ocasio, and Lounsbury, 2012: 80 call “situationism”) structures and shapes individual behavior, but allows for variations and inconsistencies in behavior; this feature markedly differentiates this approach from the rational choice and structural determinism perspectives. Thus, their integrative model of the micro-foundations of institutional logics emphasizes not only how individual agency is culturally embedded in institutional logics, but also how individual agency is involved in the reproduction and transformation of organizations, thereby connecting the micro- and meso-levels of analysis to show that there are both enabling and constraining effects of institutional logics on social action.

A core feature of Thornton, Ocasio, and Lounsbury’s (2012) model is that it recognizes that not all social actors are equally embedded in or committed to prevailing institutional logics. They state: “Institutional logics provide a network of accessible structures to guide the individual’s focus of attention. The activation of each aspect of institutional logics is contingent on the applicability of accessible knowledge structures to salient aspects of the situation and the environment. If no aspects of highly accessible institutional logics are viewed as applicable or relevant, individuals may rely on other available institutional logics to activate knowledge and information for further

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45 Thornton, Ocasio, and Lounsbury (2012: 98-102) identify seven important features their integrative model of the micro-foundations of the institutional logics approach accounts for: 1) institutional reproduction, 2) individual differences in embeddedness, 3) differentiation and complexity in institutional logics, 4) exogenous and endogenous change, 5) top-down and bottom-up attention, 6) the role of language linking micro-cognition to culture and institutional logics, and 7) micro-interactions and macrostructures.
information processing (84). Drawing from previous research like Greenwood and Suddaby’s (2006) account of changing logics in Canadian accounting firms due to actor’s network position and Meyer and Hammerschmid’s (2006) analysis of changing logics in Austrian public administration because of professional identity and commitment, they show that social actors can vary in their cultural embeddedness in and commitment to pre-existing logics. The central insight is that social actors play a significant role in determining whether or not more than one logic is accessible to an organization, how meaningful one or multiple logics may be, and how, or in what ways, the logic or logics impacts actual behavior. How available, accessible, and actionable institutional logics are is variable and is contingent upon both institutional and organizational culture and an organizational actor’s agency.

A second core feature of their model is that it accounts for both top-down and bottom-up attention. The former is consistent with prior theory and research (Thornton and Ocasio, 1999, 2008) which views institutional logics at multiple levels of analysis (organizational, field, and society) and as a mechanism for focusing attention. Cho and Hambrick (2006), for example, in their examination of deregulation in the airline industry reported a shift from a government logic to a market logic that emanated from top management teams enforcing an entrepreneurial attention perspective. The shift in attention from operational management to entrepreneurial management was top-down; it depended upon the composition and communication of managerial attention. Bottom-up attention originates with organizational actors and is dependent upon the salience of environmental stimuli, or the relative importance of one stimulus in comparison to others.
Binder (2007: 568) states: "Logics are not purely top-down: real people, in real contexts, with consequential past experiences of their own, play with them, question them, combine them with institutional logics from other domains, take what they can from them, and make them fit their needs. When activation of an institutional logic is not automatic, alternative institutional logics may serve as "toolkits" for individual action (Swidler, 1986), and can be drawn from other situational contexts, allowing for both automatic taken-for-granted behavior and agency. Both top-down and bottom-up attentional processes ultimately shape the focus of attention through availability, accessibility, and activation of identities, goals, and schemas (Thornton, Ocasio, and Lounsbury, 2012: 91-92).

The recognition on the part of institutional and institutional theorists that more individual-level understandings of institutions are important and necessary reflects the general critique of institutional theory that the individuals who populate it are portrayed as either cultural "do pes" (Garfinkel, 1967) or heroic "change agents" (Strang and Sine, 2002). There is an absence of research which identifies and explains the existence of institutional logics, how they become present and/or accessible in an organization, and how "regular" organizational actors experience and manage institutions on the ground, particularly in pluralistic environments. And although there is a growing interest in multi-institutional settings and "institutional complexity" (Pache and Santos, 2010; Greenwood et al., 2011), much of the research in the area focuses on organizational responses to

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46 Swidler (1986) culture as "toolkit" perspective views culture as something to be used and drawn upon. People do not just passively live within a culture, but actively use elements of that culture to inform their behavior and decision-making. Culture is simultaneously constraining and enabling people's behavior, choices, proclivities, etc. (Alexander, 2003; Hays, 2000).
conflicting institutional orders at the field level rather than on identifying, explaining, and defining the relevance and salience of institutional logics to organizational actors.\textsuperscript{47} Thornton, Ocasio, and Lounsberry\textsuperscript{(*)} (2012) concept of bounded intentionality and Swidler\textsuperscript{(*)}’s “cultural toolkit” approach could help to explain how organizational actors interface with multiple institutional logics by identifying what logics are available, defining the nature of their demands, and explaining how logics become accessible and inaccessible, and when and why certain logics are activated or inactivated as these local actors go about their everyday activities creating and re-creating organizational life.

Collectively then, scholarship suggests that institutional logics stem from critical social sectors of society and impose a set of normative cultural expectations and practices upon organizations and organizational participants which are cultural embedded in these social sectors. The imposition of such cultural expectations and practices, communicated via institutional logics, are deemed problematic in hybrid organizations because of the pluralistic nature of their organizational form. This pluralism, however, creates the space for both top-down and bottom-up attention and the opportunity for organizational participants to exercise agency.

In the remaining sections of this chapter, I will 1) identify the institutional location of homeowners’ associations in the context of the American history and ideology of homeownership; 2) review my data collection and analysis procedures; 3) use my

\textsuperscript{47} The constructs of institutional pluralism and institutional complexity are often used interchangeably in the institutional literature; they are seen as synonymous terms. I do not see them as synonymous. I differentiate the two constructs based on their influence in the organizational environment. For me, institutional pluralism refers to situations where multiple logics are present, but are not simultaneously accessible or do not exist in direct contradiction with one another and institutional complexity refers to situations where multiple logics are present, accessible, and contradictory. This view is in keeping with recent scholarship from Pache and Santos (2010) and Besharov and Smith (2013).
qualitative interviews with homeowners' association board members in Massachusetts, observations of homeowners' associations, and textual analysis of homeowners' association documents to identify, define, and explain the institutional logics available and/or present in homeowners' associations; and 4) advance my argument for how and why the American history and ideology of homeownership generates and institutionalizes two logics of homeownership which create institutional complexity in the organizational environment of homeowners' associations. The two logics of homeownership generate conflicting visions about the purpose of homeownership, the nature of the identity of homeowner, and the purpose of a homeowners' association. Ultimately I will show that the American history and ideology of homeownership produces a cultural rhetoric of homeownership that is mismatched to the organizational structure and composition of homeowners' associations. This mismatch creates the potential for intra-organizational conflict between organizational actors at the individual and organizational levels as everyday organizational actors exercise bounded intentionality and respond to the demands of multiple logics of homeownership.

**Institutional Context: The American History and Ideology of Homeownership**

Central to Thornton and Ocasio's (2008) and Thornton, Ocasio, and Lounsbury's (2012) theories on the institutional logics perspective is the idea of cultural embeddedness or the idea that all social action is culturally embedded in institutional logics and that institutional logics stem from normative material and cultural components historically situated in institutions. To the extent that this is true, homeowners' associations are situated against the backdrop of the American ideology of
homeownership and the organizational actors that populate homeowners’ associations (board members and non-board members) are culturally embedded within it. The ideology frames organizational actors’ understandings of homeownership and provides them with symbolic structures to understand and construct their environments. It imbues homeowners’ associations with meaning and purpose and imposes upon these organizations a cultural template. Thus, it is important to understand homeowners’ associations’ placement within the American institution of homeownership.

**The Origins of an Ideology**

For decades United States housing policy has focused on promoting homeownership because of the belief that homeownership is a "public good." Owning a home, it was, and is, communicated, is good for homeowners because it helps them accumulate personal wealth. It is good for the economy because it encourages people to work hard and save. And it is good for society because it encourages people to invest more in their communities, develop personal relationships, and engage more in civic activities. Homeownership should be every individual’s or family’s goal because it benefits everyone. The strength of this belief is that owning your own roof, walls, and

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48 A public good is a good that is non-excludable and non-rivalrous. Homeownership is non-excludable because it is not possible to exclude other individuals from the benefits that homeownership provides. For example, the stability that widespread homeownership provides to a community cannot be limited to only homeowners; the stability would benefit renters in the community as well. Homeownership is non-rivalrous because changing the level for one in a neighborhood will change it for all. For example if one homeowner’s home is foreclosed upon it affects all house prices in the neighborhood. The government encourages homeownership, and reinforces the notion of homeownership as a public good, by allowing homeowners to deduct mortgage-interest payments from taxable income and promoting public policy programs designed to increase rates of homeownership. These programs are based on the belief that homeownership provides external benefits to society.

49 A large variety of government programs have served over time to promote homeownership. Most of these policies work by reducing the cost of homeownership or by increasing the flow of capital to the housing market.
space matters in significant ways. It is a strongly held American value and is a well-defined part of the American Dream.

The American ideology of homeownership dates back to Thomas Jefferson’s exaltation of the Yeoman Farmer. The Yeoman Farmer owned the land he labored on; Jefferson believed that this conferred upon him a special dignity and autonomy that was to be emulated. Not only would small-scale ownership of property—particularly homes, small businesses, and financial savings—improve economic autonomy, but it would also serve as a check on monopoly capital. Thus, it was very early on in America’s history that property ownership came to be imbued with economic value.

The idea that owning property conferred some economic value endured during the 19th century, yet it wasn’t until the early 20th century that the belief in the social value of homeownership first found expression. By then, the new accessibility to land outside of a crowded city brought about by the development of the streetcar as a mode of transportation had firmly established the single-family home as the ideal dwelling, and the government fearful of socialist and communist sentiment had come to support homeownership as a national value. After all, as one organization of realtors stated, "socialism and communism do not take root in the ranks of those who have their feet firmly embedded in the soil of America through homeownership" (Kelly, 1993: 49). The overture of government support for the social value of homeownership came in the form of a promotional "Own Your Own Home" campaign and a "Better Homes in America"

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50 Jefferson believed that if individuals owned property they would be less likely to be obligated to support the politics of their employers or landlords.
campaign, both sponsored in part by the United States government. Together these were the first federal programs explicitly aimed at encouraging and promoting the social value of homeownership.

The collapse of the economy and the wave of house foreclosures during the Great Depression hindered the success of these campaigns; however, the federal government continued to support homeownership. Herbert Hoover, inaugurated only months prior to the start of the Great Depression and a strong advocate of homeownership, created the Federal Home Loan Bank Act near the end of his presidency to increase the supply of money available to local institutions that made home loans. Franklin Roosevelt later supported this act by creating the Federal Housing Authority (FHA) and establishing the 30-year fixed rate mortgage as a part of his New Deal legislation. The creation of the 30-year fixed rate mortgage put homeownership within the reach of many more American families who were still regaining their footing after the Great Depression.

Following the lead of Hoover and Roosevelt, nearly every new president and administration since has championed the economic and social value of homeownership.

George H.W. Bush's Secretary of Housing and Urban Development (HUD), Jack Kemp,

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51 The "Own Your Own Home" campaign, originally launched by the National Association of Real Estate Boards and now known at the National Association of Realtors, was taken over by the U.S. Department of Labor in 1917. The campaign was largely promotional and included handing out "We Own Our Own Home" buttons to schoolchildren, sponsored lectures at universities, and distribution of posters and banners extolling the virtues of homeownership and pamphlets on how to get a home loan (Cannato, 2010: 71). The "Better Homes in America" movement, chaired by Vice President Calvin Coolidge, began in 1922 and was designed to celebrate homeownership, home maintenance, and home improvement. It is largely credited with expanding the market for household consumer products in the years immediately following World War I when there was a critical shortage of homes.

52 Herbert Hoover was such a great promoter of homeownership as a social value that he once wrote that homeownership could "change the very physical, mental, and moral fiber of one's own children."

53 Prior to the creation of the 30-year fixed rate mortgage, home mortgages were primarily balloon rate mortgages.
went so far as to say that homeownership as a public policy could save babies, save children, save families, and save America (Kiviat, 2010). Similarly, President Bill Clinton stated homeownership was an essential part of the American Dream and that he wanted to make the dream of homeownership a reality for all Americans. Toward that end, in 1995 he introduced the National Homeownership Strategy to boost the homeownership rate among low-income and minority Americans. Clinton expressed the importance and value of homeownership to the nation: When we boost the number of homeowners in our country, we strengthen the economy, create jobs, and build up the middle class, and build better citizens (United States Department of Housing and Urban Development, May 1995). President George W. Bush, who during his presidency hosted several conferences on homeownership, said that homeownership has the power to transform people. He referenced the importance of homeownership as an American value during the announcement of his homeownership initiative called The American Dream Down Payment Fund: Owning something is a freedom, as far as I’m concerned. It’s part of a free society. And ownership of a home brings stability to neighborhoods. You own your home in a neighborhood, you have more interest in how your neighborhood feels, looks, whether it’s safe or not. It brings pride to people; it’s an asset to society. It helps people build up their own individual portfolio, provides an opportunity, if need be, for a mom or dad to leave something to their child. It is an important part of America (United States Presidential Speech, 2002). President Barack Obama, speaking several years after the financial crisis, reiterates these points: But if we take the steps I put forward today, then I know we will restore not just our home values, but our common
values. We’ll make owning a home a symbol of responsibility and a source of security for generations to come, just like it was for my grandparents, and just like I want it to be for our grandchildren (United States Presidential Speech, 2013). Over the past 80 years, the United States government has devoted significant public resources to encouraging and promoting homeownership. Homeownership is the omnipresent public policy goal of every administration: whether they were looking to promote an economic or social political agenda, homeownership was the answer. No other issue has been met with more bi-partisan support than housing and no other social institution has been more popularly credited with providing so many benefits to individuals and to society than homeownership.

The Benefits of Homeownership

Prior to the 2009 sub-prime mortgage crisis and with few exceptions, homeownership has been popularly credited, in politics, public policy, and popular culture, as a social policy with only benefit for the individual and the public. It is viewed as a public good largely because it is believed to confer many types of benefits upon both the individual and society. These benefits can be divided into two broad categories: economic and social. Economic benefits refer to primarily financial benefits that might accrue to the individual homeowner, the larger community, or society. The reported economic benefits of widespread homeownership include wealth accumulation, financial and housing security, and a strengthened national economy. Social benefits refer to a variety of benefits that accrue mainly to those other than homeowners themselves. The

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54 A great deal of literature assesses the relative value of homeownership by assessing its economic and social benefits (see: McCarthy, Van Zandt, and Rohe, 2001 and Rohe, Van Zandt, and McCarthy, 2001).
reported social benefits of homeownership include increased rates of neighborhood stability, social and civic involvement, and improved educational achievement.

Economic Benefits

Both U.S. policymakers and the public believe that homeownership provides significant economic benefits for the individual, the family and the country. The 2013 National Housing Pulse Survey, sponsored by the National Association of Realtors (NAR), reports that Americans overwhelmingly believe owning a home is a good financial decision, and a majority of renters say homeownership is one of their highest priorities in the future.\(^55\) Wealth accumulation, borrowing power, stability, and freedom are the four most cited economic benefits of homeownership.

The main economic argument cited by proponents of homeownership is that homeownership is the most important way in which families accumulate wealth and achieve financial security. Families accumulate wealth and achieve financial security in four basic ways. First, in preparation to buy a house, individuals and families go on a "voluntary" savings plan in order to acquire the minimum amount of wealth necessary to buy a house. Potential homeowners, advocates of homeownership reason, are more likely to be economically responsible by establishing good credit and saving for the explicit goal of putting down a substantial down payment for a home.\(^56\) \(^57\) Second, after the

\(^55\) The national telephone survey took place from May 28 – June 5, 2013 and consisted of 2,000 respondents. Eighty percent of respondents reported believing that buying a home is a good financial decision. Seventy-nine percent of those who reported being currently renters reported that homeownership was a future priority, with 51 percent of those reporting that it was one of their highest priorities.

\(^56\) There is some historical merit to this argument. A 1996 study by Haurin, Hendershot, and Wachter found young householders’ decisions prior to buying their first home (e.g., deciding to live with one’s parents longer or delay fertility) led to savings which contributed to the minimum amount of wealth necessary to purchase their first house. This study, along with two others by Sheiner (1995) and Engelhardt
purchase of a home, homeowners go on a “forced” savings plan. Homeowners accumulate wealth because with each required payment on the principal on their mortgage they are increasing their equity and, ultimately, their net worth.\textsuperscript{58} The idea is that the mortgage payment mechanism effectively forces households to save more than they otherwise would have if they not purchased a home. Wealth is accumulated to the extent that the constant-dollar value of the owner’s equity exceeds any decline in the home’s value. Third, homeowners enjoy tax advantages from owning their home, in effect reducing their housing costs and aiding their accumulation of wealth. These include tax deductions for mortgage interest and property taxes, as well as tax-exempt capital gains from the resale of the home. These tax benefits can be substantial.\textsuperscript{59} Lastly, proponents of homeownership also argue that homeownership is a “safe” investment that virtually guarantees the financial security of a household. This is because homeownership is a leveraged investment (even though only a small part of the purchase price is paid as a down payment, the buyer controls all appreciation and absorbs any loss in the value

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7 Critics of this argument point to rampant risky mortgage lending practices which advertise “no money down” mortgages. Prior to the financial crisis the average prospective homebuyer could easily obtain 100 percent financing from nearly any bank or lender; the 80/20 combo loan, which is comprised of two mortgages, one for 80 percent of the selling price and a second for the remaining 20 percent of the selling price, were very common in the early 2000s. This type of loan is risky because it assumes endless appreciation of the home. Today, post-financial crisis, the average homeowner is generally expected to put down 20% of the total selling price of a home.

58 Critics of the “homeownership as savings accrual” argument will point out that a true savings account earns interest and is accessible at any time. The savings accrued in the payment of a home can only be accessed by selling, refinancing, or taking out a loan or line of credit on the house, some of which may actually extend the length of the mortgage or cause the homeowners to pay more interest to the lender over time.

59 The tax benefits for homeownership are more advantageous for high income households and less advantageous for low and moderate income households (McCarthy, Van Zandt, and Rohe, 2001). Capone (1995: 341) shows that since standard deductions were raised in 1986 with the introduction of the Tax Reform Act, the homeowner tax subsidy from interest, discount, points, and property taxes is worth less than $50 the first year of ownership and zero after that for low and moderate income households.
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of the property). Over the long term, despite the potential for loss, proponents of homeownership argue that homeownership as an investment is less risky than other types of investments and “nonetheless, a critical factor in moving up the economic ladder” (United States Department of Housing and Urban Development, August 1995). Despite the fact that the effectiveness of each of these arguments has recently been called into question, proponents of homeownership still argue that owning a home is the single best investment a family can make and is one of the best ways to save and earn wealth.60

A second presumed economic benefit of homeownership is greater borrowing power. For homeowners who choose to sell their investment the benefit is accumulated equity and increased wealth; for those homeowners who choose to stay in residence the benefit is accumulated equity and increased borrowing power. The additional equity can be used to secure an additional loan or obtain another line of credit. The homeowner, advocates of homeownership argue, can use this greater borrowing power to fund home improvements or to assist with the purchase of an investment property.61 Studies by the Federal Reserve Board from the late 1990s indicate that about 40 percent of homeowners do use their increased borrowing power for home improvements, which potentially could

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60 Li and Yang (2010), in their analysis of the benefits and costs associated with owning one’s residence, argue that in most circumstances owning one’s own home does not aid in wealth accumulation or pay off as a long run investment. One reason for the former is because for every dollar of household price appreciation homeowners take out 3, 4, or even 10 cents of their home equity for other consumption purposes effectively treating their house as an ATM, never actually saving or accumulating money. One reason for the latter is that housing is just as susceptible to market conditions as are other investments like stocks. Flavin and Yamashita (2002) echo this sentiment. Their study reports that in most cases consumers purchase more housing than is optimal with regard to their investment, thus deflating the potential to achieve a maximum return on their investment. Perhaps this is what led one recent Wall Street Journal article to declare that homeownership is a “losy” investment (Bridges, 2011).

61 Proponents of homeownership often emphasize its potential for additional use in the housing market; however, this additional borrowing power can also be used to fund emergencies, purchase big-ticket items, spend on vacations, or generally consume.
raise the value of a house and thus contribute to wealth accumulation; however updated statistics on the extent of such activity are not available and critics would point out that the majority of those homeowners who engage in refinancing strategies are not borrowing for the purpose of home improvement. Second homes and investment properties are similarly heralded by homeownership proponents as vehicles to accumulate wealth. The government supports this assertion by extending the same tax benefits it affords to primary residences to second homes as long as homeowners stay in the home at least 14 days a year or rent the property for at least 10 percent of the time. Li and Yang (2010) note, however, that during tough financial times the foreclosure rates of investment properties rise at a much faster rate than that of loans for primary residences and are just as subject, if not more, to the whims of the market when compared to other medium-term investment strategies.

In addition to the increased financial security homeowners enjoy through wealth accumulation, homeownership also provides increased housing security and economic stability. McCarthy, Van Zandt, and Rohe (2001) report that homeownership increases housing security to families in three ways. First, homeowners are better able to customize their residences to suit their personal needs and tastes. Second, homeowners have access to higher-quality dwellings than do renters. For example, homeowners usually have larger and more private residences. Third, homeowners enjoy diminishing housing costs over time. Further, because of their fixed-rate mortgages and forced savings plans, homeowners are better able to make long-term financial plans because they basically know what their month-to-month and year-to-year financial responsibilities are for a
period of 30 years. Renters, on the other hand, may be subject to unanticipated rent increases and over the long-term are more likely to pay more on housing costs because while homeowners mortgage payments remain constant as income increases rents usually rises at rates close to or above the general rate of price inflation.\textsuperscript{62}

A final economic benefit lauded by homeownership enthusiasts is freedom. In particular, homeownership provides individuals freedom from paying rent, freedom from being confined by the restrictions of a landlord and/or other neighbors, and indefinite control of their living space. The decision-making autonomy that comes from owning their home gives individual homeowners the right to personalize and customize their residences to their own personal tastes and not answer to others about the use of their personal residence. This assurance is present in the introduction to President Clinton's National Homeownership Strategy Brief: "Owning a home embodies the promise of individual autonomy" (United States Department of Housing and Urban Development, August 1995) and is valued as an implicit interest of individual homeownership. The idea is that homeowners are able to control the value of their economic investment based on the personal decisions that they make.\textsuperscript{63}

\textsuperscript{62} Critics of this argument will note that renters are not subject to the additional home ownership and maintenance costs that homeowners are subject to such as closing fees, homeowners' insurance, landscape costs, routine maintenance and upkeep costs, etc. Research shows that because homeowners often purchase larger and higher quality residences their "housing-intensive" preferences might result in more frequent and expensive maintenance (Rothenberg et al., 1991; Galster, 1987) that could negate the difference in housing costs between homeowners and renters.

\textsuperscript{63} Critics of the promise of individual autonomy in homeownership would point out that to an extent the economic value of a home is determined by the value and condition of housing in the neighborhood; therefore homeowners must rely on one another to help maintain their position in the housing market and in home valuations. Rothenberg et al. (1991) notes that in most cases homeowners prefer to be surrounded by other homeowners (as opposed to renters) because owners have similar incentives, the main one of which is to maintain the investment values of their residences.
From a macro-level perspective, homeownership is also credited with providing economic benefits to society. Due to its perceived stabilizing effect, policymakers and government officials often view increasing homeownership as a central strategy for successful economic development. This strategy assumes that homeownership establishes a common economic interest that creates a social network of mutually reinforcing relationships. Besides the labor market, the housing market is the most significant market and accounts for a large portion of production activity with many forward and backward linkages to the rest of the economy. It is for this reason that most policymakers, government officials, and advocates of homeownership believe that homeownership fosters widespread economic benefits through job creation and other economic stimuli. McCarthy, Van Zandt, and Rohe (2001: 34) caution, however, that homeownership can also stifle the economy:

"Widespread homeownership makes the national economy inflexible—unable to respond quickly or efficiently to changing scenarios in the world economy."

The same authors, with discerning clairvoyance, further note: "While a vibrant housing sector might lead the national economy out of financial doldrums, instability in the housing sector can have devastating regional and local impacts. Bubbles—extreme events in housing markets can distort local economies much like boom-and-bust cycles of energy markets. [É ] Housing value losses associated with job loss can put families in the untenable position of needing to sell to move, but being unable to sell because of negative equity."
Social Benefits

In addition to economic benefits, U.S. policymakers also tout the social benefits of widespread homeownership for the individual, the family, and the country. The introduction to President Clinton’s National Homeownership Strategy (1995) includes the following passages:

Homeownership is a commitment to strengthening families and good citizenship. Homeownership enables people to have greater control and exercise more responsibility over their living environment.

Homeownership is a commitment to community. Homeownership helps stabilize neighborhoods and strengthen communities. It creates important local and individual incentives for maintaining and improving private property and public spaces.

These passages indicate that the federal commitment to and subsidy of homeownership is justified because of the social betterment properties of homeownership. The 2013 NAR National Housing Pulse Survey reveals that the public echoes and even elevates the importance of the perceived social betterment properties of homeownership. Survey respondents, when asked to rate the reasons for why homeownership is important, gave some of the highest importance ratings to neighborhood stability and quality measures rather than wealth accumulation measures.64 The social benefits most often associated with widespread homeownership include: increased neighborhood stability, increased social and civic involvement, and increased commitment to social values.

One of the most persistent claims made for homeownership is that owners have a greater economic and emotional stake in their community and thus are more likely than

64 Of the five highest rated factors relayed to survey respondents, three were indicators of the social benefits of homeownership and two were indicators of the economic benefits of homeownership.
renters to act in ways that maintain and strengthen the community. This claim, however, is mostly conjecture; while there is a rich sociological literature on the social and political life of communities, surprisingly few studies have considered the explicit role of homeownership or housing tenure on community life. Those studies that have examined the role of homeownership on neighborhood stability have focused on homeowners’ length of residence, neighboring, preservation, and crime prevention.

Homeownership and neighborhood stability are correlated with one another: homeowners move less frequently than renters, and hence are embedded into the same neighborhood and community for a longer period of time. The U.S. Census Geographical Mobility survey confirms this relationship. It found that only 4.7 percent of owner-occupied residents moved from 2011-2012, as compared to nearly 27 percent of renters. These rates are heavily correlated with age (the “mover rate” is higher for younger individuals who are more frequently changing jobs, not yet married, and have fewer geographical commitments) and other variables such as income and marital status; however, the U.S. Census report, after controlling for these variables, found that homeownership does have a statistically significant impact on lowering the mover rate and increasing neighborhood stability. That is, among people of the same age, same income, and same marital status, a person was significantly more likely to change residence in a given year if he or she was a renter rather than a homeowner. This

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65 Sociological studies have tended to concentrate on the importance of factors such as age, sex, socio-economic status, presence of children, and residents’ attitudes about their neighbors and neighborhoods on the social and political life of communities.
66 Rohe, Van Zandt, and McCarthy (2001) additionally report that homeowners stay in residence for a median duration of 8.2 years while renters only maintain their residences for a median duration of 2.1 years.
relationship is important, homeownership advocates argue, because the longer individuals reside in a neighborhood, the more stable the neighborhood is. Thus homeownership signifies stability and a family’s commitment to a neighborhood and community.\(^{67}\)

The neighborhood stability that homeownership provides is associated with several other social benefits. Chief among them is increased "neighboring." Because homeowners are much more likely to reside longer in a neighborhood, it is argued that homeowners, unlike more transient renters, will much more readily forge relationships with their neighbors and nurture a sense of community. Several studies have found evidence that homeownership is positively associated with higher levels of neighboring. Galster’s (1987) investigation of neighborhood upkeep in Minneapolis and Ohio, for example, revealed that homeowners’ sense of familiarity and solidarity with their neighbors was significant in determining their efforts to reinvest in their homes and neighborhoods.\(^ {68}\)

Another benefit associated with neighborhood stability and homeownership is neighborhood preservation. Advocates of homeownership assert that homeowners are more likely than absentee landlords or their tenants to maintain and improve their properties. Galster’s (1987) research supports this proposition. After controlling for a

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\(^{67}\) Rohe and Stewart (1996) suggest that homeownership impacts stability through two mechanisms. The first mechanism references the human capital that homeowners have acquired; homeowners tend to be higher-income, higher-educated, family households and thus can anticipate staying in a residence for a longer term. The second mechanism references the additional interest that owners have in their homes; homeowners are more likely to join organizations with other community members in order to protect the collective interests of the area.

\(^{68}\) A 1996 study of General Social Survey data by Rossi and Weber, however, found conflicting accounts of owner and renter behaviors. On the one hand they reported that renters are more likely to spend evenings with neighbors, but on the other hand they reported that owners are more likely to give help to others. This finding casts some doubt upon the argument that owners are more likely to "neighbor."
series of structural, household, and neighborhood characteristics, Galster shows homeowners who reside in their dwellings spend more on maintenance, are less likely to defer repairs, and report fewer housing problems than other groups. Rohe and Stewart (1996) also show the positive effects of homeownership on neighborhood preservation. Their research suggests that homeownership contributes to stable or increasing property values and that neighborhood stability encourages participation in community organizations, local social interaction and attachment, property maintenance, neighborhood satisfaction, and positive expectations about the future of the neighborhood (Rohe and Stewart, 1996: 54-55). 

Popular and academic research also supports the assertion that the behaviors associated with stable neighborhoods deter crime. The literature suggests two connections between stable housing and crime. First, long-term homeowners encounter significantly lower crime rates (Alba, Logan, and Bellair, 1984; Glaeser and Sacerdote, 1999). Second, crime is reduced via informal social controls. To the degree that residential stability strengthens social ties with neighbors, crime is diminished (Warner and Rountree, 1997). Sampson, Raudenbush, and Earls (1997) suggest that collective efficacy, or social cohesion and strong ties among neighbors (such as those developed in homeowner-occupied neighborhoods) combined with willingness to act on behalf of the common good, is an effective means of social control. Their study of over three hundred Chicago neighborhoods supports their hypothesis that residential tenure and homeownership promote collective efforts to maintain social control. Because

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69 Rohe and Stewart believe that these benefits are a result of stability and extend beyond homeownership.
70 This relationship remains true even after controlling for other variables like socioeconomic status.
homeowners have a lot more to lose, they have more of an incentive than renters to deter crime by forming and implementing voluntary crime prevention programs (National Association of Realtors, 2006).

Proponents of homeownership argue that homeowners are more civically and socially engaged, they are more willing to commit time and resources to organizations and activities that promote social cohesion or address community problems. Andrew Cuomo, former Secretary of Housing and Urban development, embodied this sentiment on the 50th anniversary of the Housing Act of 1949 when he said: “Housing is more than just bricks and mortar; it is the building block of community, it is powerfully tied to civic behavior to working together with neighbors on shared concerns, to literally making us a part of a block, a neighborhood, a town, a country, a nation. Homeownership makes us stakeholders in something greater than ourselves” (Coulson, 2002). Several arguments have been advanced to explain why homeowners may be more likely than renters to participate in voluntary organizations and political activities. Rohe, Van Zandt and McCarthy (2001) summarize three of them: 1) homeowners may be more likely to be civic and social participants because they have an economic investment in their homes and they see participation in voluntary and political organizations as a means of protecting that investment (Baum and Kingston, 1984; Rohe and Stewart, 1996); 2) the transaction costs associated with moving are greater for homeowners so there is an economic incentive for owners to join community associations to maintain and preserve their neighborhoods (Cox, 1982); and 3) homeowners may develop an attachment to, pride in, and identification with their home and surrounding community that leads them
to be more civically and socially engaged (Baum and Kingston, 1984). Research supports these arguments; data has consistently shown that homeownership is associated with greater social and political participation (Ahlbrandt and Cunningham, 1979; Baum and Kingston, 1984; Cox, 1982; Lyons and Lowery, 1989; Guest and Oropesa, 1986; Rohe and Stegman, 1994; Rossi and Weber, 1996; DiPasquale and Glaeser, 1999; Kingston and Fries, 1994).\footnote{As before, it is not clear if homeownership itself determines more civic and social engagement rather than an underlying propensity to be both an owner and more civically and socially involved.}

Homeownership is also believed to imbue a strong commitment to social values. In particular, advocates of homeownership suggest that there is a relationship between homeownership and socially desirable youth behaviors. Homeownership is thought to be directly or indirectly linked to better school performance, lower school dropout rates, and lower rates of teen parenthood (Green and White, 1997). Research has generally confirmed that access to economic and educational opportunities are more prevalent in neighborhoods with high rates of homeownership and community involvement (Ellen and Turner, 1997) and that homeownership has a positive effect on children. Green and White (1997) suggest that homeowners have a stronger incentive than renters to monitor their own children and their neighbors’ children because children’s bad behavior can threaten property values. The same authors also suggest that homeownership instills an \textit{I-can-do-it} type of attitude in homeowners that extends to children’s behavior. Other studies
report similar educational and non-educational benefits (Haurin, Parcel, and Haurin, 2000; Boehm and Schlottman, 1999).\textsuperscript{72}

In sum, supporters of homeownership credit homeownership with producing many economic and social benefits both for homeowners themselves and for society. While empirical research bears some of these benefits out, others are only weakly supported by data, and most are subject to questions of spuriousness. Although it is difficult to disentangle the causal impacts of homeownership and the outcomes it is purported to provide, it is clear that policy makers and the general public strongly believe in homeownership and affords it great economic and social meaning. The strong presence of the American ideology of homeownership strongly resonates in American politics, public policy, and popular culture, so it stands to reason that the institution of homeownership and its material, cultural, and symbolic ideological components impose upon homeowners and organizations associated with homeownership organizing beliefs, behaviors, expectations, and rules which guide the perceptions and practices of those culturally embedded within it.

Data Collection & Analysis

Data Collection

To address the three main questions of this research required two steps.\textsuperscript{73} First, I had to measure how common intra-organizational conflict is in homeowners' associations

\textsuperscript{72} Haurin, Parcel, and Haurin (2000) use panel data from the National Longitudinal Survey of Youth to show that homeowners offer a youth a more stimulating and supportive home environment. This type of environment has a positive impact on cognitive and behavioral outcomes. Boehm and Schlottman (1999) use data from the Panel Study of Income Dynamics to show that homeownership is a highly significant predictor of educational attainment. Children translate greater educational attainment into increased earnings and rates of personal homeownership.
by conducting a survey of Greater-Boston area homeowners' association board members to ascertain whether conflict is common in homeowners' associations (it is) and whether external or internal determinants of conflict were better able to predict the occurrence of significant intra-organizational conflict (my findings provide some support for several of the external and internal determinants of conflict predicted to explain conflict in organizations, however, an internal and cultural measure of the presence of multiple institutional logics emerges as the key predictor of intra-organizational conflict in homeowners' associations). Second, I had to confirm the hybrid organizational form of homeowners' associations by identifying, explaining, and defining the institutional context of homeowners' associations. This second step assumes that institutional logics cannot be directly or fully measured through any one variable or set of variables. So while the first phase of this research (Chapter Two: Homeowners' Association Board Member Survey) provided necessary and useful empirical information, it alone was not sufficient to address the main questions of this research. It was a necessity that I also conduct qualitative interviews with board members of homeowners' associations to assess whether or not there was evidence of different visions, assumptions, values, beliefs, or expectations about the purpose the homeowners' association and, more

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73 See Chapter One: Introduction for a full description of my research agenda. In short, I sought to answer the following three questions: 1) How common is intra-organizational conflict in homeowners' associations; 2) What are the sources of intra-organizational conflict in homeowners' associations; and 3) What makes some homeowners' associations more and less conflicted?  
74 See Chapter Two: Structure v. Culture: The External and Internal Determinants of Conflict to read more about this phase of my research.  
75 In Chapter Two: Structure v. Culture: The External and Internal Determinants of Conflict I use a variable that measures whether or not homeowners' association board members believe that its organizational members share a common vision about the purpose of a homeowners' association. This variable is merely meant to indicate the possible presence of multiple institutional logics. I do not claim that this variable directly or fully measures institutional logics.
generally, of homeownership, and, if there was evidence of this, to ascertain what the prevailing logics were, where they originate from, and how and why they impact the day-to-day actions and decisions of homeowners' association board members and the larger organization.

To identify, explain, and define the available institutional logics and to understand their role and enactment in the everyday activities of organizational actors, I conducted semi-structured interviews with homeowners' association board members. These interviews were conducted from the fall of 2011 through the spring of 2012 via telephone, Skype, or in-person, each lasting between 45 minutes to two and one-half hours in length. Interview respondents were purposively selected based on their participation in my Homeowners' Association Survey and their willingness to talk. Of the 176 respondents to this survey I followed up with 80 participants (40 respondents each from less and more conflicted associations). Of those 80 participants that I requested to interview, 56 consented to the interview (30 respondents from the most conflicted and 26 respondents from the least conflicted associations).

76 The semi-structured interview format allows for a much deeper exploration of the board members' experiences than would have been possible using surveys alone (Charmaz, 2006).

77 The average interview length was one and one-half hours.

78 As noted in Chapter Two: Structure v. Culture: The External and Internal Determinants of Conflict, of the 176 board members responding to this survey, approximately 46% reported their association experienced at least one significant instance of conflict in the prior 12 months. I distinguished between less conflicted and more conflicted associations using responses to this question and several additional questions designed to measure different dimensions of conflict such as How many times in the last year has your board experienced a significant instance of disagreement regarding the proper course of action for your association? How many times in the last year has your association issued a notice of non-compliance? and How many times has the association been threatened with or involved in a legal dispute in the last five years?

79 A table (C-1) detailing the descriptive characteristics of my interviewees may be found in Appendix C.
I focused on homeowners’ association board members because they are the primary decision-makers and the individuals who on a day-to-day basis define the culture of the organization and structure and enact the everyday beliefs, activities, and practices of the organization. Others, such as non-board member unit owners, homeowners’ association managers, and financial and legal advisers, are all important players in the environment of homeowners’ associations; however, they do not do the work of the organization or have an active role in the day-to-day identification, elaboration and enactment of institutional beliefs and practices.

The initial interview protocol consisted of 40 open-ended questions which focused on general information about the interviewee and his or her association, the purpose of a homeowners’ association, personal experiences serving on the board, responsibilities of the board, the board’s decision-making process, rules, regulations, and governance, legal matters, and interactions with non-board members and management. After the initial set of interviews, the original interview protocol was winnowed down to approximately 30 open-ended questions in accordance with developing codes and themes. All of the interviews were digitally recorded and transcribed. I used Atlas.ti 6 to code and analyze all interview transcripts.

On several occasions interview subjects invited me to make observations of their association. I was asked to attend both open and closed-door meetings as well as election nights and association activities. I was also invited to attend and give presentations at several regional and national community association events sponsored by the Community

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80 The final interview schedule may be found in Appendix B.
Associations Institute (CAI). CAI events were well attended by both industry personnel (e.g., community association managers, contractors, etc.) and board members and non-board member unit owners in associations. The conferences consisted of a mixture of speaker presentations, question-and-answer sessions, educational sessions, and vendor booths. When asked to attend these events (homeowners' association and CAI), I sat in on these gatherings and took notes. My jottings were turned into fully fleshed-out and richly detailed field notes as soon as possible after leaving the observation site. These observations were important as they provide insights into relationships between board members and other groups and, in the cases of open and closed-door meetings at associations, into areas where problems in the association surface and reoccur, and are ultimately resolved (or not). Several interview subjects also offered to share copies of their association’s CC&Rs, board minutes, and other homeowners’ association records with me. These documents were similarly coded and analyzed along with my interview transcripts. Observational and textual data were considered supplemental to my interview data.

**Data Analysis**

My interview transcripts, observations, and documents were analyzed using an inductive, grounded theory approach (Glaser and Strauss, 1967). As suggested by Suddaby (2006), I approached the coding process iteratively and sensitized by my survey data, literature regarding the American ideology of homeownership, and my reading of the extant literature on institutional theory and the institutional logics framework. I focused on theoretically salient themes and codes as discussed in the theory section while
keeping an open mind to emergent themes and codes in the data. I began with a strategy of open coding and in subsequent readings of the data developed a finite list of coding categories. I frequently alternated between reading theory and examining my data, looking for emerging patterns and themes, memoing, and then returning to theory and my data to refine and focus my codes and interpretively develop my concepts. As themes and concepts emerged I refined my data collection and recording process. When able to I also presented these codes, themes, and concepts to my interview participants and other board members, non-board members of homeowners’ associations, and others at homeowners’ associations and CAI events to clarify and verify my observations, insights, and conclusions.  

From this process I developed a theoretical typology, an abstract model of two ideal types of institutional logics: an economic logic and a social logic. Both logics reference the American history and ideology of homeownership and represent a combination of attributes emanating from different institutional sectors of society (private, public, and non-profit and theoretical sectors defined by Friedland and Alford (1987, 1991) and Thornton, Ocasio, and Lounsbury (2012)) and believed to create the potential for intra-organizational conflict in homeowners’ associations.

**Institutional Logics in Homeowners’ Associations**

*Logics of Homeownership*

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81 I was able to do this four times; once three months into my interviewing process, once six months into my interviewing process, once after data collection was complete, and once after I started drafting this chapter and the next.
My qualitative research reveals the concurrent presence of two types of institutional logics in homeowners' associations: an economic logic and a social logic. Strong and consistent evidence of the presence of both the economic logic of homeownership and the social logic of homeownership is found in all of the homeowners' associations, regardless of whether the association was categorized as more or less conflicted. Both logics reference the cultural rhetoric of the American ideology of homeownership, draw from different institutional orders, and provide potentially conflicting information about the purpose of homeownership, the identity of the homeowner, and the purpose of a homeowners' association. The economic logic primarily draws from the institutional orders of the market, the corporation, and the state and views homeownership as a financial investment, identifies the homeowner as an investor, and likens a homeowners' association to a corporation. The social logic primarily draws from the institutional orders of the community, the family, and the state and views homeownership as an investment in community, identifies the homeowner as a neighbor, and likens a homeowners' association to a family business. These two logics represent the available cultural repertoires that accompany the status of homeowner in homeowners' associations. I find that board members in all homeowners' associations regularly draw upon both of these logics in their day-to-day activities to establish identity.

82 Based on the institutional location of homeowners' associations I expected to identify three logics, one consistent with the market, one consistent with civil society, and one consistent with the state. My analysis, however, revealed only two logics. Characteristics consistent with the state were subsumed into the two other logics. For example, bureaucratic tendencies were found to best represent the economic logic of homeownership, while democratic tendencies were found to best represent the social logic of homeownership.
and purpose, identify interests and goals, and decide upon the practices to do the work of the organization. Table 3-1 summarizes the ideal-type characteristics of both logics.

**The Economic Logic of Homeownership**

The economic logic of homeownership broadly represents the manifestation of the institutional orders of the market, the corporation, and the state and the economic systems of market and managerial capitalism (Thornton, 2004; Thornton, Ocasio, and Lounsbury, 2012). Homeownership is a rational, self-interested transaction with an emphasis on efficiency and financial gain. Wealth accumulation, increased borrowing power, financial stability, and financial freedom are among the supposed economic benefits that homeowners believe they will accrue in exchange for the costs of homeownership (McCarthy, Van Zandt, and Rohe, 2001). This logic imbues homeownership with an economic value—particularly that of a profit motive. As such, homeownership is framed as a financial investment, the homeowner is an investor, and a homeowners’ association is a corporation.

**Homeownership as a Financial Investment**

The idea that homeownership is a financial investment stems from the popularly held belief that homeownership provides significant financial benefits to the individual and the family. This belief is inscribed into the cultural fabric of America and can be seen in the public policies of the government, the aspirations of the public, and in popular culture. President Bill Clinton’s 1995 National Homeownership Strategy famously sought

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83 As detailed earlier in this chapter, policymakers, nonprofit leaders, and housing experts often publically extol the economic benefits of homeownership. Many public reports and public policy initiatives have argued that homeownership drives individuals’ and families’ economic prosperity. President Bill Clinton’s 1995 National Homeownership Strategy is an example of such initiatives.
Table 3-1: Ideal Types of Institutional Logics in Homeowners’ Associations

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Economic Logic</th>
<th>Social Logic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institutional orders</td>
<td>Market, Corporation &amp; State</td>
<td>Community, Family &amp; State</td>
</tr>
<tr>
<td>Economic system</td>
<td>Market capitalism &amp; Managerial capitalism</td>
<td>Cooperative capitalism</td>
</tr>
<tr>
<td>Sources of identity</td>
<td>Homeowners as investors</td>
<td>Homeowners as neighbors</td>
</tr>
<tr>
<td></td>
<td>Bureaucratic identification</td>
<td>Ideological identification</td>
</tr>
<tr>
<td>Sources of legitimacy</td>
<td>Property values</td>
<td>Democratic participation</td>
</tr>
<tr>
<td>Sources of authority</td>
<td>Board of directors</td>
<td>Board of directors</td>
</tr>
<tr>
<td></td>
<td>System of administration</td>
<td>Commitment to values</td>
</tr>
<tr>
<td>Basis of norms</td>
<td>Self-interest</td>
<td>Group membership</td>
</tr>
<tr>
<td>Basis of mission</td>
<td>Build economic value</td>
<td>Build social value</td>
</tr>
<tr>
<td>Basis of attention</td>
<td>Short-term governance</td>
<td>Long-term governance</td>
</tr>
<tr>
<td>Basis of strategy</td>
<td>Increase efficiency/profit</td>
<td>Increase community good</td>
</tr>
<tr>
<td>Control mechanism</td>
<td>Rigid adherence to the rules</td>
<td>Personal relationships</td>
</tr>
<tr>
<td>Nature of homeownership</td>
<td>Individual</td>
<td>Shared</td>
</tr>
</tbody>
</table>
to create eight million new homeowners in five years because “through homeownership, a family… invests in an asset that can grow in value and… generate financial security” (United States Department of Housing and Urban Development, May 1995). Four years post sub-prime mortgage housing crisis, the 2013 National Housing Pulse Survey reports that Americans still overwhelmingly believe owning a home is a good financial decision, and a majority of renters say homeownership is one of their highest priorities in the future.\textsuperscript{84} And, in a scene from the classic film \textit{It’s a Wonderful Life}, Jimmy Stewart, whose firm sold a happy couple a home mortgage, reflects that there is “a fundamental urge… for a man to have his own roof, walls, and fireplace.” He then offers them bread, salt, and wine so “joy and prosperity may reign forever.”

Not surprisingly, then, the notion that homeownership is a significant financial investment trickled down to my interviewee’s expectations and understandings of homeownership and reverberated throughout their responses to the question of why they first decided to purchase a home. They often expressed the view that homeownership is the “biggest financial investment” they will ever make and frequently made reference to the economic rationales they drew upon when they were in the housing market.\textsuperscript{85} 86 The

\textsuperscript{84} The national telephone survey, sponsored by the National Association of Realtor (NAR), took place from May 28 \textendash June 5, 2013 and consisted of 2,000 respondents. Eighty percent of respondents reported believing that buying a home is a good financial decision. Seventy-nine percent of those who reported being currently renters reported that homeownership was a future priority, with 51 percent of those reporting that it was one of their highest priorities.

\textsuperscript{85} According to Sechrest and Sidani (1995: 79) qualitative researchers can extract more meaning out of their research by using word counts. They argue that qualitative researchers regularly use quantitative terms such as “many,” “most,” “frequently,” and “several” in their explanation of their research, but that these terms lack context. Word counts improve the vigor of qualitative data analysis and can enhance verhesten by preventing the researcher from overweighting or underweighting the importance of emergent themes and concepts (Leech and Onwuegbuzie, 2007; Sandelowski, 2001).
frame of homeownership as a financial investment is exemplified by one board member’s reasoning for purchasing a home and, in particular, purchasing a home in a homeowners association:

Well the main reason I purchased a home was for my retirement. My parents always said this funny thing. They said that the best bank they had was their mortgage because their mortgage was their mandatory savings plan and that all of those payments would pay off when it was time to sell the house and retire. So as soon as I was financially able to I purchased a home so that I knew I had some sort of financial security. I didn’t want to waste my money paying rent because I knew that I would be paying for someone else’s Florida and not my Florida.

Following up on this admission, I asked the same 40-something homeowner and board member whether the desire to achieve some financial security specifically factored in to her decision to buy a home in a homeowners association. She states:

Oh yes. Yes. Yes. Yes. At first I looked at both homes in associations and regular homes, but what I noticed was that the homes in HOAs were always more tightly kept up than regular homes. I knew that I was probably making the biggest financial investment of my lifetime and I wanted a nice profit. I wanted to grow my wealth. Get to that secure place for my retirement. And I just knew that I couldn’t depend on regular neighbors for that; for instance I looked at one house in the Nashoba Valley it was a really nice house, great square footage, a nice backyard, you know nice. It was a really great deal too. I probably would have made quite a hefty profit on that one. The thing was though that I looked to the left, to the neighboring house and it just wasn’t nicely kept up. I don’t know why, but that observation stayed with me and a couple of days later I had a sort of epiphany, I didn’t want someone else to drag me down. I didn’t want to have to rely on someone else to get my profit. So I decided right then and there I was only going to look at homes in associations from then on.

This homeowner’s reasoning for purchasing a home in general and a home in a homeowners association in particular is representative of the institutional orders of the

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86 The word “investment” was recorded in 52 out of the 56 responses to my question asking about each interviewee’s reasons for purchasing a home. In 50 of the 56 cases the respondent specifically said “financial investment” or “economic investment.”
market and the economic logic of homeownership in three ways. First, she frames her process for selecting a home to purchase as a rational one by invoking a cost-benefit analysis (i.e., she reasons that although one home offered good square footage and re-sale value, the costs associated with worrying about the neighbor’s upkeep of an adjacent home were too high). Second, she is solely focused on her own financial interests (i.e., she reasons that paying rent is not in her own financial self-interest whereas homeownership is). Third, she places an emphasis on financial gain (i.e., she reasons that she is making a large financial investment and thus wants to see a short- and/or long-term payoff depending on when she is ready to sell her home).

Economic rationales such as the one offered by the above homeowner were common. With a focus on homeownership as a financial investment, property values come to indicate the legitimacy of an investment; property values should always be, at worst, stable and, at best, increasing. Property values are akin to share prices and are reflective of the relative worth of an investment. Higher property values signal a greater return on investment. A board member, responding to a question about what the short-term and long-term responsibilities of the board are, acknowledges the pressure to keep property values high:

Property values. For both. Keeping them high. Thankfully we don’t have a lot of turnover in our building, but when someone is selling their place there is always a hushed gossip about what they are selling their unit for and after the unit is sold what it sold for. If it is any less than what that individual paid we hear about it even if it is a different floor plan! It drives me nuts because I’m always trying to reassure everyone that our community is good, their investment is good. I mean we just had a lobby renovation, we added a gym a couple of years ago but what is inside that door is theirs and what is outside of our property is outside of our control. I always like those things matters too you know.
This board member’s responsibility on both a short- and long-term basis was to reassure association members of their investment and to make sure that their association was competitive with other homeowners’ associations in their market environment. The mission of the homeowners’ association then is to maintain and enhance property values through enforcing the covenants of the association and maintaining the common areas of the association. It is the responsibility of board members to focus on building the economic value of the association. Many of the other board members I interviewed admitted to feeling this same type of pressure often commenting on the importance of property values and real estate *comps* (i.e., comparable homes and associations in the geographic area) as being a measure upon which their performance is often judged. In 48 out of my 56 interviews, board members referenced “property values,” “home values” or “comps/comparables” as one of the most important indicators they have about the relative financial health of their association. Others frequently noted included size of association reserves and operating budget. This situation is very similar to how a corporation’s board of directors reports on market share and market position of the firm. Board members of homeowners’ associations are tasked on a day-to-day basis with assessing the financial well-being of their investment as it compares to others on the market.

**Homeowner as Investor**

The status of homeowner holds a venerable place in the psyche of the average American, and part of the reason why is that homeownership signals security and individual accomplishment. Data from the National Survey of Families and Households supports the assertion that homeowners are happier, have higher self-esteem, and are more autonomous (Rossi and Weber, 1996). Rohe and Stegman (1994) suggest that

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87 In 48 out of my 56 interviews, board members referenced “property values,” “home values” or “comps/comparables” as one of the most important indicators they have about the relative financial health of their association. Others frequently noted included size of association reserves and operating budget.
homeownership contributes to an individual’s sense of self via three mechanisms: internalization, comparison, and self-assessment. Since homeowners are afforded a higher social status in American society (Doling and Strafford, 1989; Dreier, 1982; Marcuse, 1975; Perin, 1977) homeowners internalize their status as self-esteem appraising themselves as more autonomous, self-sufficient, and accomplished than non-homeowners. In all, the status of homeowner becomes incorporated as an important part of one’s identity.

To the extent that the status of homeowner informs an individual’s identity, the economic logic of homeownership imparts the identity of homeowner as investor. Capitalizing upon the notion that the purpose of homeownership is financial investment in pursuit of self-interest, this identity emphasizes one’s sense of self as a member of a social group, in this case a financially interested party. The importance of this identity can be read into my interviewees’ repeated distinctions between owners and renters. Take for example, this board member’s identification of one his association’s most persistent problems:

We have too many renters. That’s what all the owners say at our open meetings. We constantly are looking for ways to reduce the number of renters we have and increase the number of present owners. We are really clamping down on absentee owners. We kind of eased up on that during the crisis you know because it was harder to sell a house then and now that we feel things are rebounding on that front we’ve been really trying to reduce the number of tenants we have—it just doesn’t look good you know. We want more owners than tenants in residence because you know—it even though this really hasn’t been true here, we’ve been lucky with the quality of our renters because of our proximity to the Longwood medical area. renters are transient. They care less because they don’t own.

Even though this board member admitted that the quality of renters in his association was high, the idea is that renters do not and will not care enough about the property they
reside in because they are not financially invested in it. The weight of this status is so important that it often overrides other personal characteristics that might make a renter a better neighbor than an owner (i.e., being polite, friendly, quiet, helpful, considerate, etc.). A non-board member unit owner that I chatted with at one of the CAI conferences echoed the importance of this identity. We were talking about why I chose this topic for my research and I responded that it emerged from my personal experience living within an embattled condominium association. She immediately asked me if I was an owner or a renter. I answered that I was a long-time renter in the building. She laughed and said rather affectedly “Oh my my, a renter.” This conversation struck me as significant because normally the people I converse with about my research want to share their story, or are interested to hear about what I learned from my research. This woman though, first in her immediate request to hear about my status, and then in her response to my status, leveled an assessment and made a value judgment about me based on what being an owner versus a renter meant to her. Because renters are not shareholders in the homeowners’ association community (i.e., investors in the corporation) their status is one of “less than” and their presence represents a “problem.” In-group and out-group designations like this signal not only the presence of a shared identity, but also the importance and significance of the shared interests that define them.

Homeowners’ Association as a Corporation

A homeowners’ association is typically a non-profit corporation that is created by a developer when a community is in the planning stages. The association is governed by a

88 The distinction between what it means to be an owner versus a renter was a common theme in my research. Demeaning identifications or descriptions of renters appeared in 38 of my 56 interviews.
board of directors that initially consists of the developer and his representatives and later consists of elected homeowners following the sale of a percentage of homes in the community.\textsuperscript{89, 90} Thus, the structural origin of homeowners' association is corporate in nature.\textsuperscript{91} There is a hierarchy, albeit a fairly flat one, that typically consists of an elected board of directors at the top, a manager or management company in the middle and non-board member residents at the bottom. This hierarchical structure informs the work of the board of directors and defines their system of control. A long-time chairman of his homeowners' association reflects on how this structure impacts the nature of control:

This is a business, but it is a unique one. Board members are the same, but different. We volunteer to serve on the board and are elected to serve on the board, but are not paid. In this way we are less like a corporate advisory board and more like elected officials. We have control, but we don't have control. We have to listen to the residents and go by the rules. It gets messy. That's why I've kind of acquiesced to the realization that I am a bureaucrat and this is a bureaucracy. We follow the rules to a T.

I asked the same board member to explain more about why he felt his association was bureaucratic in nature. He responded:

Here's an example. A couple of weeks ago a resident of ours bought a bicycle. We have several bicycle racks in the garage, but they are full. So he saw that one of our other residents had bought a personal bicycle rack and placed it at the front of his parking spot. This other resident thought this was a good idea and purchased one as well. Not two days after he had placed his rack in his spot the person with the parking spot next to him complained. I went down to inspect it and he was still well within the confines of his parking space and his bike and car were not impinging on the adjacent spot at all. Well, long story short, it led to an inspection of the rules of the association and we ultimately had to have both residents remove their personal bicycle racks. Now they roll their bikes through

\textsuperscript{89} For more information about the organization of homeowners' associations and a full description of the core characteristics of homeowners' associations see Chapter One: Introduction.
\textsuperscript{90} These positions are voluntarily filled by residents of an association and are unpaid.
\textsuperscript{91} The origination of the organization and the basis of the Covenants, Conditions, and Restrictions (CC&Rs) are economic. The association and its associative rules are presented as rational structures and documents meant to preserve the economic value of the property.
the lobby on the carpets and into their units. It makes no sense to me how this is better, but "thems the rules." This board member's example reflects the tendencies of corporations to be bureaucratic in nature and provides evidence of the "irrationalities" often associated with increasing rationality in organizations (Ritzer, 1993). Homeowners' associations are governed by a series of "rational" documents (CC&Rs) meant to preserve the economic value of the property, but in practice these Covenants, Conditions, and Restrictions often produce unintended irrationalities. In this case, rather than storing a bicycle in the garage where it posed no danger to the economic value of the association, now, by forcing these residents to wheel their bikes through the lobby and on the hallway carpets, it does. There is a greater potential for the lobby and hallway carpets to become dirty and muddied or torn and worn. This is a hazard that the board member recognizes, but feels he is helpless to control; he places the authority of the condominium trust into the CC&Rs. Nonetheless, the bureaucratization of homeowners' associations is still believed to preserve the economic value of the association because of the influence of the institutional orders of the corporation.

Recently more and more homeowners' associations have chosen to employ managers or management companies to handle the day-to-day administrative functions of the association. This represents a shift to managerial capitalism whereby the capitalistic enterprise is administered by managers rather than by owners. The board of directors can

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92 Of the 179 respondents to my Homeowners' Association Survey, 76.4% reported that their association employed a manager or management company to handle administrative functions of the association. Although there isn't any regional or national data available to confirm that this rate is increasing, the Occupational Employment Statistics shows a 1.2% increase in the number of community association managers (Bureau of Labor Statistics, May 2012).
hire managers or management companies to supervise a wide range of administrative functions including managerial services, financial services, communications services, and contractor/vendor services. The services can range from simple advisory services to full-service management. The following board member of a very small association reflects on his decision to hire a part-time manager for the association:

It was a big decision for me. I mean we are only five units, but it just got to be so difficult to organize and much too time intensive and way too combative. Since I am the board I just wanted to pass off the responsibility to someone else, someone who could exert control differently than me and who maybe seemed like he had more authority to the other owners – someone who could cite the CC&Rs and could more strongly enforce sanctions if need be without personal repercussion.

This board member was most interested in shifting the responsibility of dealing with complaints, delinquencies, and collections. He assumed that using a manager would legitimize the authority of the association because instead of answering to "the guy in the unit next door" as he described himself, the other owners would now answer to someone who could use his position as manager, and the power of the Covenants, Conditions, and Restrictions to enforce the authority of the condominium trust. This type of leadership is akin to Weber's legal-rational authority wherein authority resides in the rules and the rights of those elevated to authority positions and imbued with the power to use the rules to issue such commands. By imparting this type of formal authority onto a manager, this board member believed the economic well-being of association would be better preserved.93

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93 Board members frequently used words such as "authority," "control," or "power" to describe their reasons for hiring a manager or management company. Of those board members whom I interviewed 50 of them employed a manager or management company and 36 of them used language such as this to describe why they hired a manager or management company.
The Social Logic of Homeownership

The social logic of homeownership broadly represents the manifestation of the institutional orders of the community, the family, and the state and the economic system of cooperative capitalism (Thornton, 2004; Thornton, Ocasio, and Lounsbury, 2012). Homeownership is a route to individual fulfillment and community betterment; it is a way to connect with others who share similar values and build social relationships. Increased neighborhood stability, social and civil involvement, and a shared commitment to social values are just some of the social benefits that homeowners believe are associated with their investment in a home (Rohe, Van Zandt, and McCarthy, 2001). This logic imbues homeownership with a social value—particularly that of democratic participation and personal relationships. As such, homeownership is framed as an investment in community, the homeowner identifies as a neighbor, and a homeowners’ association is likened to a family business.

Homeownership as an Investment in Community

Homeownership has long been credited with providing social benefits to the individual and society. The introduction to President Bill Clinton’s National Homeownership Strategy (1995), for example, attributes homeownership not only with economic benefits, but also with social benefits such as creating stronger families and communities and better citizens. The 2013 National Housing Pulse Survey reveals that the public echoes and even elevates the importance of the perceived social betterment properties of homeownership. Survey respondents, when asked to rate the reasons for why homeownership is important, gave some of the highest importance ratings to
neighborhood stability and quality measures rather than wealth accumulation measures.\footnote{140} Homeownership functions to create common bonds and build community.

Many people purchase a home in order to foster social relations and build a connection to a community. Homeowners are more apt to be knowledgeable about community affairs and are presumed to be more likely to participate in community affairs. In keeping with this view, the board members I interviewed were just as likely to offer a social rationale for purchasing a home as they were likely to offer an economic rationale.\footnote{95} Take, for example, this board member's reasoning for purchasing a home and, in particular, purchasing a home in a homeowners association:

My wife and I were in the process of downsizing. Our kids were out of the house and married and the house we had was just too big for us— you know the whole "empty nest" thing. We wanted a smaller place and we wanted to be in a place where people shared a similar lifestyle. We wanted to be around people and activity. We wanted playmates. Our old neighborhood was a great place to raise kids, but we weren't a part of that scene anymore, we kind of felt like the old fogies of the street.

I asked him if his and his wife's desire to be a part of a community with similar interests factored into their decision to purchase a home in a homeowners association.

It did. You know we weren't exclusively looking at 55-year and older communities to live in, but once we visited this property and this might seem cliché to say we knew it was the one. We knew that it was the right decision for us.

I prompted him to tell me more about how he and his wife knew it was the right decision.

\footnote{140}{The national telephone survey, sponsored by the National Association of Realtor (NAR), took place from May 28 \textendash June 5, 2013 and consisted of 2,000 respondents. Of the five highest rated factors relayed to survey respondents, three were indicators of the social benefits of homeownership and two were indicators of the economic benefits of homeownership.}

\footnote{95}{When asked about their decision to buy a home 41 of 56 respondents cited social reasons related to building community and making personal connections.}
Well, I guess I would have to say that we knew it was right when we saw the clubhouse. We hadn’t ever really considered that any property we might buy may have a clubhouse, but once we saw it we kind of fell in love with it. There was a gym, a pool, and rooms to play pool or cards— you know different types of activities. We liked the idea of being active and having things to do.

This board member’s account is representative of the institutional orders of the community in three ways. First, he and his wife were invested in finding a home and a community in which personal relationships were valued. They wanted a home situated near people in the same stage of their life course; presumably so that they could bond with others who were likely to share similar values. Second, his and his wife’s identification of the clubhouse as a key factor in their decision to purchase a home in a homeowners’ association signaled the symbolic value of the clubhouse. Homes tend to be personal in nature, the clubhouse, however, symbolized a shared connection and group membership. Third, he and his wife wanted to be active members in their community; they wanted to be a part of something larger than themselves. In all, homeownership for them was an investment in the social relationships and a homeowners’ association represented the mechanism to build social relationships and community.

The view that homeownership is an investment in social relationships and community was common, especially in board members reasons for choosing to purchase a home in a homeowners’ association. Many of my interviewees noted that prior to purchasing their home they believed that homeowners’ association communities would better represent their interests and values because of owners’ membership in the

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96 Interviewees explicitly cited personal relationships, shared values, shared interests, similar life stage and the like in 44 of the 56 interviews to describe why owning a home in a homeowners’ association appealed to them.
homeowners' association. Group membership and a commitment to the group were resonant themes. Consider this board member's commentary on the homeowners' association as a voluntary organization:

You have to be a part of the association. Buying equals membership. To me this meant that you are in it together. So when I purchased my home I actually felt some comfort in that. I had just gone through a difficult selling process with my previous home because of the financial downturn. When I purchased my current home I really liked that I would now be a part of something that people had chosen to be a part of.

I asked her to tell me more about why membership in the association was important to her given her difficulty in selling her previous home. She states:

Well I feel like we are working together to make the best community possible. Membership in an HOA means that you have a stake in something. Before I was selling a home on my own, when it comes time to sell my current home it won't be on my own – I mean the work I put into my personal home will be part of it, but I won't just be selling that, I'll be selling a fabulous community too – one that, as a board member, I helped to build and maintain. I think it's priceless really. We have real friendships here and such a small-town atmosphere.

This board member's admission is interesting not only because it echoes the sentiment that personal relationships are important in the home buying process, but also because of her purposeful emphasis on the voluntary nature of membership in a homeowners' association. She frames a homeowners' association as a type of voluntary association wherein members are united not only by their membership in the association, but also by their interests and values. By acknowledging the role of the association in the housing market she likens the process to one of cooperative capitalism. In her view, homeowners' associations represent an autonomous entity whereby people voluntarily cooperate for

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97 When an individual buys a home in a homeowners' association he or she is automatically a member of the association. She and some of my other interviewees' emphasis on the voluntary nature of membership are notable because some would characterize it as forced or obligatory membership.
their mutual economic and social benefit. She equated building a harmonious community and strong social relationships with building the economic value of the community.

Homeowner as Neighbor

As detailed in the "The Economic Logic of Homeownership" section of this chapter, the status of homeowner is incorporated as an important part of one’s identity. Whereas the economic logic of homeownership imparts the identity of homeowner as investor, the social logic of homeownership imparts the identity of homeowner as neighbor. Building upon the assumption of this institutional logic that homeownership is an investment in community and social relationships, this identity emphasizes one’s sense of self as a member of a social group, in this case a neighborhood or community. This identity is solidified through the process of "neighboring" and is supported by academic research which shows that homeowners, unlike more transient renters, will more readily forge personal relationships with their neighbors and nurture a sense of community. The implication is that homeowners who identify as neighbors are more likely to involve themselves in community matters. A board member, when asked about why he volunteered to serve on the board, reveals how he came to understand his identity:

I lived in my home for a long period of time and was never interested in serving on the board. I was busy—I worked full-time, I had had two young kids, and I just really didn’t need another obligation. To be honest, my wife and I were pretty self-centered at the time; we didn’t really take this whole association thing seriously. That changed though when we heard that our HOA board was supporting a measure to install a cell phone tower on our property. This was a

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98 Galster’s (1987) investigation of neighborhood upkeep in Minneapolis and Ohio revealed that homeowners’ sense of familiarity and solidarity with their neighbors was significant in determining community involvement.
turning point for me because it really changed my perspective on the association. I got together with a few of my neighbors and we banded together to prevent it from happening. After that I realized I needed to serve on my board because we are each other's business and we really need to be active.

I asked him to explain more about why this was a pivotal turning point for him. He states:

Well, it started out of anger and the turning point came out of my reflection on the cause of that anger. I was outraged because it didn’t seem like the board valued our perspective on such a big decision. It propelled me to act. It changed my beliefs and it changed the way I felt about myself and my community. After that I realized that we are more than just people who bought a house next door to one another — we are neighbors, we are partners — and that means that all voices should be heard and that we should act as one.

His use of the label “neighbor” is laden with meaning. A neighbor, in his view, is not just someone who lives in close proximity; it is someone who shares similar values and unity of vision. It represents a connection that will inspire action and “neighborly” behavior. A non-board member unit owner expounds upon this point:

I really learned the importance of community in my current home. My husband died suddenly two years ago and because of that I moved to Boston to be closer to my daughter. In the day-to-day though I was alone and at 63-years old I was starting over. I used to sit in the patio area every afternoon because I was lonely, being inside by myself seemed claustrophobic. Well anyway, people started to notice me — in particular a young woman who lives in my development. She started to stop and talk to me on her way to her place. I guess she talked to others she knew in the development — she was a board member and they started to stop by and talk to me too. Eventually the board decided to host a “social hour” once a month for people in the development to connect. This woman, for me, taught me about neighborliness and community.

Taken together, these accounts define the identity of neighbor as one in which there is a social relationship between people that is characterized by a common boundary or interest, a commitment to shared values and beliefs, and an emotional connection or response that inspires action. The legitimacy of this identity comes from a strong
ideological identification with the status of homeowner and a unity of action on the part of those beliefs.

Homeowners’ Association as a Family Business

Corporations and family businesses may both deal in the distribution of goods or services for profit, but there are real differences between the focus and intentions of the two types of enterprises. Corporations, and the investors who run them, in the strictest sense, are motivated solely by the profits at the expense of any other short- or long-term considerations. Family businesses, and its stewards, by contrast, act in the long-term interest of business and all of those involved. This distinction may be extended to beliefs about the purpose of a homeowners’ association as defined by the economic and social logics of homeownership. As I detailed earlier in this chapter the economic logic of homeownership likens a homeowners’ association to a corporation and homeowners to investors, the social logic of homeownership, on the other hand, likens a homeowners’ association to a family business and homeowners to neighbors. The economic system of cooperative capitalism and its correspondent belief that homeownership is an investment in community creates a family business-like atmosphere in which there is an emphasis on enlightened self-interest, social relationships, and family politics.

The social logic of homeownership recognizes the business interests of homeowners’ associations, but does not frame those interests as purely driven by individual self-interest or a strict profit motive as may be expected by the economic logic of homeownership. Instead, the interests of the homeowners’ association are driven by "enlightened self-interest." This concept, first introduced by Alexis de Tocqueville in
1835, refers to self-interest driven by serving the long-term good. As de Tocqueville noted in his book *Democracy in America*: The Americans are fond of explaining almost all of the actions of their lives by the principle of interest rightly understood; they show with complacency how an enlightened regard for themselves constantly prompts them to assist each other and inclines them willingly to sacrifice a portion of their time and property to the welfare of the state. Board members who act as stewards for their association sacrifice some short-term interests of unit owners for the long-term interests of the association. One board member comments on his struggles to maintain a patient capital approach:

I am constantly struggling with how to make our unit owners understand the decision-making process of the board. Many of them are solely focused on the short-term; they want lower monthly fees and don’t even get me started about when we broach the topic of a special assessment. I have to remind them that if we don’t fix things now then little problems become big problems. It’s like medicine really—some preventative measures go a long way.

This type of approach, a patient, preventative, and proactive approach, may be likened to family businesses in that owners of family businesses often have to forgo personal financial rewards in the short-term in order to help launch, nurture, grow, and maintain their businesses in the long-run. The pursuit of short-term profit usually undermines future security as in the case of one Boston-area condominium association that for years delayed capital investments in its infrastructure eventually leading the board to levy a $100,000 special assessment. Upon completion of their capital improvements projects the board released a memorandum stating the following:

We are writing to update you on the capital improvements projects that have taken place over the last several years. As you know the Board is charged with the responsibility of protecting the value of the Baldwin Condominium Trust. From
the 1960s to the 1990s there was little maintenance done on the property and major renovations were deferred. This Board has taken an aggressive approach (both structural and cosmetic) to "catch up" on the deferred maintenance and bring the Condominium to a condition of which we are all proud. While it is impossible to speak about the future in certain terms, the Board would like keep up this approach and plan now for the future. While the Board has the ultimate responsibility for protecting the Condominium, the Board has always taken into account the desire of the majority of the Unit Owners.

This memorandum references the importance of enlightened self-interest, responsible governance, and social relationships. The board must make responsible decisions that take into account the interests of all parties involved including current and future unit owners. This will create an environment in which the "family" business system can continue to flourish and not fall victim to what one board member called the "tragedy of the association" as a riff off of the classic economic problem of the tragedy of the commons. This witty and future-thinking board member also shared his "rules" for governance in a homeowners' association. The rules included making long-term stewardship a priority, running the association as a business but with a democratic and "community" focus, working with unit owners to ensure a smooth transition from one generation to the next, investing in education for "the kids," and respecting and learning from other unit owners because "this business is personal."

The latter portion of his rules speaks to the importance of social relationships and the dynamics of "family" politics in homeowners' associations. His choice of words like "next generation" and "the kids" to describe other members of the association was surprisingly common. The nature of the relationships in homeowners' associations took

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99 Twenty-five of my 56 interview respondents used the analogy of a family to describe personal relationships in homeowners' associations.
several different forms, however, one common theme was that board members were

(parents and non-board members were children children who were often in need of
discipline.

For example, one board member, when asked about why types of non-compliance
with community rules and regulations occur, remarked:

It's almost like we [the board] are the parents and our children are trying to get
away with things, either out of ignorance first, or they're just trying to find a way
around it. So one of the things we routinely do is we go through the halls and
the stairways and get after people about not leaving stuff out in the hallways. It's
a common area, don't do it. Those are the kind of things that we feel like, "Why
are we still even talking about this?" They are our children, and we are training
them. But, it never ends. They never grow up.

Another board member account uses a similar analogy after asked about whether or not
the board is threatened with lawsuits by other non-board member unit owners:

No. They wouldn't dare, they're afraid. Now, what I see is, even if somebody
asks for something that they really want, but they get an explanation about why
we really can't allow it and we say, "You understand that right?" Really
patronizing you know. They go along with that now, more likely than a couple
of years ago [before what she described as a regime change on the board]. So
our children are growing up a bit.

Not all characterizations, however, are negative. Board members liken homeowners'
associations to family businesses because of the complex mixture of the public and the
private. The following board member makes note of the interplay between the two:

The place is well run and cared for. So we are able to establish boundaries
between the business and the family. So we're able to now get down to the social
events. And you know what we discovered? Yeah, some of our neighbors are
interesting people! And isn't it nice, now we can have friendly relations with our
neighbors, not everybody we still got a couple of the crazy relatives you know, it's
like a family. How do you get the family together and have a nice
time when the roof is leaking and there's no hot water and there's no heat and
nobody is doing anything about those things?
Another common theme was that homeowners' associations' boards, much like family businesses, must develop a succession plan and prepare the "future generation" of board members. One board member reflected upon the imminent end of his term:

I'm served several terms, probably more than I should have according to the CC&Rs, but I kind of founded this board after we took over from the developer. I'm ready to retire though, so to speak, because I can't keep up with everything because of some health problems I'm having. So I'm stepping down at the end of my current term. I'm trying to find the right replacement though — the right person to pass the baton too, I want there to be consistency and an ease in the transition, and I want to know that the board will be run similarly to how I run it.

The worry that this board member is feeling regarding his succession in reminiscent of the struggles that family businesses face when personal relationships are tested by the transition from one leader to the next. He felt the need to recruit and train the next generation of board members to ensure that they would keep his tradition and style of leadership alive in the association.

In summary, my qualitative research identifies, explains, and defines the simultaneous presence of two institutional logics in homeowners' associations, an economic logic of homeownership and a social logic of homeownership. The economic logic primarily draws from the institutional orders of the market, the corporation, and the state and is characterized by self-interest, rational and efficient practices, a profit motive, bureaucratization, and managerial control. The social logic primarily draws from the institutional orders of the community, the family, and the state and is characterized by group membership, ideological identification, personal relationships, and democratic participation. Both logics stem from the American history and ideology of homeownership, societal beliefs and expectations regarding the economic and social
benefits of homeownership, and serve to influence the identities, goals, and cognitive schemas of organizational actors in homeowners’ associations.

*The Ideology of Homeownership and the Logics of Homeownership in Homeowners’ Associations*

*Ideology, Logics, and Cultural Embeddedness*

Homeowners’ associations are situated against the backdrop of the American ideology of homeownership and the organizational actors that populate homeowners’ associations are culturally embedded within it. Cultural embeddedness is a critical component of Thornton, Ocasio, and Lounsbury’s (2012) micro-foundational theory and refers to “the role of shared collective understandings in shaping strategies and goals” (Zukin and DiMaggio, 1990: 17). The ideology frames the American public’s understanding of homeownership and provides them with symbolic structures to understand and construct their environments. In the context of homeowners’ associations, the ideology frames the purpose of the organization and imposes a set of expected goals and modes of action upon the organizational actors that reside within it. It represents a top-down structure that informs, focuses, and directs the attention of social actors. I argue that, in practice, the American history and ideology of homeownership generates and institutionalizes two logics of homeownership and that institutional complexity results from the problematic intersection of the American history and ideology of homeownership and homeowners’ associations’ hybrid organizational form. The two logics of homeownership generate conflicting visions about the purpose of homeownership, the nature of the identity of homeowner, and the purpose of a
homeowners' association. Figure 3-1 diagrams the cultural embeddedness of homeowners' associations and describes the layered relationships between the American ideology of homeownership, institutional sectors, the logics of homeownership, and the beliefs, goals, and expectations that they impose on organizational actors.

The identification of the economic and social logics of homeownership bring to the fore how the American history and ideology of homeownership produces a cultural rhetoric of homeownership that is mismatched to the organizational structure and composition of homeowners' associations. One can see in Figure 3-1 that the institution of homeownership is complicated by the communal nature of homeowners' associations. Homeowners' associations, by virtue of their hybrid organizational form, sit at the crux of two different ideas about homeownership—one that primarily views homeownership as an individualistic endeavor (the economic logic) and one that primarily views homeownership as a collective endeavor (the social logic). Because institutional logics shape the "rules of the game" and "promulgate assumptions" about organizational vision, purpose, and behavior, the mere presence of multiple logics forces organizational actors to "play in two or more games at the same time" (Kraatz and Block, 2008: 243).

To the extent that this is true, the presence of both the economic logic of homeownership and the social logic of homeownership in homeowners' associations creates two different "rules of the game." On the one hand, board members have the economic logic of homeownership available to them. This logic draws from the institutional orders of the market, the corporation, and the state and is characterized by self-interest, rational and efficient practices, a profit motive, bureaucratization and
Figure 3-1: Cultural Embeddedness of Homeowners’ Associations

The American Ideology of Homeownership
managerial control. It makes homeownership a financial investment, the homeowner an investor, and the homeowners' association a corporation. On the other hand, board members have the social logic of homeownership available to them. This logic draws from the institutional orders of the community, the family, and the state and is characterized by group membership, ideological identification, personal relationships, and democratic participation. It makes homeownership an investment in community, the homeowner a neighbor, and the homeowners' association a family business. Institutional complexity results from the simultaneous accessibility of these logics by organizational actors and the contradictions of the relative orders of the logics.

Institutional Complexity and the Space for Agency

The mere availability of both logics, however, is critical because it creates the space for agency on the part of organizational actors. Given the availability of multiple logics, individuals have the potential for agency in choosing which of the multiple logics they rely on for social action and interaction (Friedland and Alford, 1991). The choice of logics is dependent upon bottom-up attentional processes such as individual differences in the degree of cultural embeddedness and the salience of the logics given the situation (Thornton, Ocasio, and Lounsbury, 2012). For example, a board member who is more strongly embedded in the economic logic of homeownership may neglect the social responsibilities of the association and focus solely on her identity as an investor. In doing so, she would only activate the economic logic of homeownership and her decisions on association matters would be solely motivated by profit. Likewise, a board member who is more strongly embedded in the social logic of homeownership may be more likely to
focus his attention on the social dynamics of the association, focusing on building personal relationships at the expense of potential profit. There is also the option that a board member could be equally embedded in the economic and social logics of homeownership and may "activate" one logic over the other given the salience of environmental stimuli in a particular situation. The latter case of which represents the optimal space for agency or the potential for purposeful action on the part of organizational actors. Board members in homeowners' associations arguably act with bounded intentionality: they are culturally embedded in a social group with which they identify and which structures and conditions their interests and goals.

Consider the following two accounts of my observations of two homeowners' associations meetings:

A fight is brewing between board members and homeowners during the quarterly open owner meeting of the Seaside Community Trust. One of the homeowners has just approached the microphone to speak with the board during the Q&A portion of the meeting. Before he even gets a word out the head of the management company the homeowners' association hires to manage the everyday workings of the organization steps forward to remind everyone to be "civil" and "constructive" with their comments. The homeowner, visibly angry, speaks loudly into the microphone: "It is just children having fun. It was a summer afternoon of fun. It is not of your concern. Your focus should be on our money… our investment. That is your job. Your job is not to stop and police our kids’ kids. I am not [he takes a moment to look back at the 20-25 homeowners gathered behind him] are not going to stand for this. I will not pay this [he holds up and shakes what appears to be a letter from the board]. You need to make the right decision here. You need to make the right decision for us."

Months later in a different homeowners' association meeting some 25 miles away another heated disagreement is taking place, this time, however, the disagreement is between two board members. The chairman of the board is calling for a vote

100 Names of homeowners' associations and interviewees have been replaced with pseudonyms to protect respondent confidentiality.
about whether or not to levy a $150,000 special assessment on the association. He argues that the special assessment is “badly needed” and will “ultimately increase our property values.” Another board member responds: “That may be true, but we just can’t and shouldn’t do this right now. We can’t drive the community apart right now. We’ve just healed and we just need time; the economy isn’t good right now. Nothing is good right now. This just isn’t the time for this. We need peace. We need stability. We need to focus first on building their [the homeowners] trust in us. We need to be good neighbors right now.”

These two scenarios seem quite different at first glance. In the first case, a homeowner is protesting a citation from the board fining him for his child’s sidewalk chalk drawings on the sidewalk outside of his house. He is calling upon the board to decide not only to dismiss the fine, but also to change the rules of the association so that situations like this do not occur in the future. In the second case, a board member is presenting a case for why the board should decide not to levy an expensive special assessment on the association given that the association has just settled a lawsuit against a former board member who was found guilty of embezzling funds from the association.

A closer examination of these accounts, however, reveals the influence of both logics of homeownership and their references to the American history and ideology of homeownership. It also reveals the mismatch between the cultural rhetoric of homeownership and the organizational structure and culture of homeowners’ associations. This mismatch creates the space for agency on the part of organizational actors. In the first scenario, the homeowner is both advocating against and for both the economic and social logics of homeownership. He is fighting the board’s decision to fine him for his child’s sidewalk chalk drawings (presumably because it impacts the financial value of the community) and charging them to only focus on the economic logic of
homeownership, while at the same time pushing the board to think about the community and to make decisions that allow personal relationships to flourish. The second scenario exhibits a similarly scaly conflict. In this case, the board member is invoking the importance of the social logic of homeownership at the expense of the economic logic of homeownership. She is able to access both logics, but given the situation, is advocating for the activation of the social logic; she wants to preserve the personal relationships of the association until the time is right to enact and use the economic logic.

**Institutional Logics as Bits of Culture**

The concurrent presence of multiple logics in various organizational environments and the newly recognized ability of organizational actors to exercise agency in the practice of institutional logics warrants the reconceptualization of institutional logics. Thornton, Ocasio, and Lounsbury (2012) micro-foundational theory of institutional logics and their model of human behavior as situated, embedded, and boundedly intentional allows for both enabling and constraining effects (rather than just constraining effects as institutional theory has traditionally assumed). This model thus effectively decouples logics from institutional orders. The disassociation of logics from institutions sanctions the theorization of logics as flexible bits of culture that constitute actors and shape their actions (Glynn, 2013: 2). In practice this means that organizational actors can draw upon multiple institutional logics in the decisions and actions they make in an organization. Envisaging of logics in this way has an affinity to Swidler (1986) cultural toolkit approach in that it conceives of organizational actors of having a repertoire of logics that they can choose from in the decision-making process.
By identifying, explaining, and defining the logics present in homeowners’ associations and showing how they intersect with the American ideology of homeownership and the hybrid organizational form of homeowners’ associations, one can better assess the how institutional logics become present and accessible in these organizations and how they are enacted in the beliefs, decisions, and activities of organizational actors. I show how homeowners’ associations exist in institutionally pluralistic and complex environments which require organizational actors to exercise bounded intentionality and highlight the ability of institutional logics to both enable and constrain organizational actors’ agency.

**Conclusion**

One of the main goals of this chapter was to identify, explain, and define the available institutional logics that govern the setting of a homeowners’ association. Identifying the available logics and distinguishing the differences among and between these logics was important to understanding how and when these logics are enacted in practice and the potential consequences of their enactment. Existing research often implicitly assumes that if multiple logics exist it is: first, problematic, and second, the result of different organizational actors bringing different institutional logics to bear in the organizational environment. My qualitative data, however, drawing from and building upon the institutional pluralism and institutional complexity constructs and Thornton, Ocasio, and Lounsbury’s (2012) meta-theory of institutional logics and micro-foundational theory of institutional logics, suggests that an organizational actor can draw upon multiple logics in a singular organizational setting. In the next chapter I will detail
the enactment of institutional logics in homeowners' associations and explore how organizational actors' responses to institutional pluralism and complexity, in particular those actualized in organizational actors' perceptions and practices, and use or disuse of multiple logics may create the potential for more and less intra-organizational conflict.
CHAPTER FOUR: “DOING” LOGICS TO LESSEN CONFLICTS

Introduction

Intra-organizational conflict is common in all types of organizations; it is naturally occurring and to be expected. The presence and nature of conflict, however, varies and can be detrimental to the functioning of an organization and its organizational actors. Structural explanations of conflict suggest that organizational and board structures, or characteristics of the organization itself, will best explain the existence of conflict. Cultural explanations of conflict suggest that an organization’s culture, or its congruity of organizational vision, will best explain the existence of conflict. As I have shown in the last two chapters, both of these explanations have merit. They can, to an extent, explain the presence of conflict. And while cultural explanations have proven to better explain the occurrence of conflict in institutionally pluralistic and complex hybrid organizations like homeowners’ associations where the dual presence of the economic logic of homeownership and the social logic of homeownership exist in opposition to one another they still cannot fully explain the intra-organizational conflict that hybrid organizations experience. Neither the structural nor the cultural explanations of conflict can explain the variability in intra-organizational conflict that hybrid organizations experience. What makes some hybrid organizations more conflicted and other hybrid organizations less conflicted?

A close examination of both explanations reveals some glaring oversights and troubling assumptions; namely their failure to fully consider the role of organizational participants and their agentic potential to cause both more and less conflict. Structural
explanations focus only on characteristics of the organization itself (i.e., organizational and board structures) omitting the concern for other organizational variables. Cultural explanations are somewhat better, but still do not consider bottom-up attentional strategies. This failure has recently been acknowledged in the institutional and institutional logics literature which notes that while there is a rich literature studying how macro-level institutions affect meso-level organizational strategies and structures (Thornton and Ocasio, 1999; Thornton, 2004; Thornton, Ocasio, and Lounsbury, 2012), there are very few studies which detail how micro-level processes, such as how social actors respond to multiple institutional logics or translate institutional logics into their everyday perceptions and practices, affect meso-level organizational outcomes. This is especially true in hybrid organizations where conditions of institutional pluralism and complexity are automatically presumed to create conflict (Figure 4-1 displays this relationship).\(^{101}\)

Thornton, Ocasio, and Lounsbury’s (2012) micro-theory of the institutional logics perspective detailed in the previous chapter is meant to endorse research in this area. I use elements of their micro-theory in addition to recent scholarship in the institutional work and institutional ambidexterity literatures to advance a third explanation for the presence of and variability in intra-organizational conflict in hybrid organizations like homeowners’ associations.

\(^{101}\) As I noted in Chapter Three: Identifying, Explaining, and Defining the Logics of Homeownership, I do not see the constructs of institutional pluralism and institutional complexity as synonymous. I differentiate the two constructs based on their influence in the organizational environment. For me, institutional pluralism refers to situations where multiple logics are present, but are not simultaneously accessible or do not exist in direct contradiction with one another and institutional complexity refers to situations where multiple logics are present, accessible, and contradictory. This view is in keeping with recent scholarship from Pache and Santos (2010) and Besharov and Smith (2013).
I argue that organizational actors’ responses to institutional pluralism and complexity, as evidenced in their perceptions and practices, and use of multiple institutional logics explain the presence of and variability in intra-organizational conflict that homeowners’ associations experience. I will provide evidence to show that all homeowners’ associations are subject to the conditions of institutional pluralism and complexity but will contend that homeowners’ associations that respond to institutional pluralism and complexity by eliminating or compartmentalizing logics (i.e., disusing one or more institutional logics) are more conflicted. Board members in eliminatory and compartmentalizing homeowners’ associations, what I will come to call non-
ambidextrous organizations, perceive the simultaneous presence and accessibility of multiple institutional logics as novel and instinctively treat it by disrupting one or more institutional logics. They do this by contesting or separating one or more logics. In practice this response creates a self-reinforcing cycle of problem and contestation and ultimately results in an incongruous organizational vision and more intra-organizational conflict. Homeowners’ associations that respond to institutional pluralism and complexity ambidextrously are less conflicted. Board members in ambidextrous homeowners’ associations perceive the simultaneous presence and accessibility of multiple institutional logics as routine and purposefully do logics to lessen conflicts. They actively maintain and use both the economic logic of homeownership and the social logic of homeownership and do logics by making adjustments, improvising, and switching between logics on a context-specific basis. In practice this response creates a self-reinforcing cycle of ambidextrous action and ultimately results in a congruous organizational vision and less intra-organizational conflict.

My focus in this chapter then is to demonstrate how board members’ responses to multiple, permanent, and conflicting institutional logics affect organizational outcomes. I aim to show that the decoupling of institutional logics from institutions creates the space for organizational actors to exercise agency. Organizational actors, namely board members of homeowners’ associations, are able to use informed discretion to draw from their institutional logics toolkit and strategically do logics for the benefit of the organization. Doing logics means to perform complex, continuing, and context-related actions which inscribe different organizational perceptions and practices within one
organizational space. By “doing logics” they are able to lessen significant intra-organizational conflict and address coexisting and opposing institutional logics as a part of the ordinary, everyday nature of [organizational] work, rather than [as] exceptional phenomena (Jarzabkowski et al., 2009: 289).

The organization of this chapter will proceed as follows. First, I will review several “problem-based” models of organizational responses to institutional pluralism and complexity. These models focus more on top-down processes than bottom-up attention strategies and are primarily concerned with organizational strategies to “correct” the problem of institutional pluralism and complexity. Second, I will review recent theoretical and empirical work in the institutional theory literature which seeks to develop an alternative organizational response to institutional pluralism and complexity. This practice-based approach focuses on how organizational actors interact and act in institutionally pluralistic and complex settings, exalts the potential benefits of institutional pluralism and complexity, and centers on the concepts of institutional work and institutional ambidexterity. Third, I will use my interview, observation, and textual data to compare and contrast organizational responses to institutional pluralism and complexity in ambidextrous and non-ambidextrous homeowners’ associations. I will show how organizational actors’ perceptions and practices create the conditions for both more and less intra-organizational conflict. Finally, I will re-visit my argument that it is organizational actors’ “not-doing or doing” of logics, rather than just the mere presence of

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102 I am liberally borrowing the terminology of West and Zimmerman (1987) to describe the ways in which organizational actors codify and manifest multiple, potentially contradictory, institutional logics.
multiple and opposing institutional logics, that creates the potential for more and less intra-organizational conflict in homeowners’ associations.

**Organizational Responses to Institutional Pluralism and Complexity**

*Identifying and Predicting Responses*

The nature of institutional pluralism and complexity demands that organizations respond to multiple and sometimes conflicting institutional demands. How organizations respond to institutional pluralism and institutional complexity has been the focus of much recent research. This research centers on identifying meso-level strategic organizational response strategies to deal with the ‘problem’ of institutional pluralism (Oliver, 1991; Kraatz and Block, 2008) and predicting organizational response strategies given the nature of the conflict caused by institutional complexity (Pache and Santos, 2010).

Oliver (1991) set an early precedent for seeking to understand strategic responses to institutional processes.\textsuperscript{103} She suggested that organizations, and their members, might not simply respond to institutional demands with passive compliance (as suggested by prevailing isomorphic theories) but could employ a range of ‘strategic’ responses to deal with institutional pressures. Oliver argued that organizations may defy isomorphic pressure from powerful institutions either by quietly ignoring those pressures or by actively challenging and attacking the sources of those pressures when they believe they can demonstrate the rationality or righteousness of their position or when they believe they have little to lose by exercising agency. She specified five types of organizational responses to plural institutional pressures including acquiescence, compromise,

\textsuperscript{103} Oliver\textsuperscript{a} (1991) model of strategic responses integrates institutional theory and resource dependency theory.
avoidance, defiance, and manipulation. The adoption of each response is bound to institutional factors including cause, constituency, content, control, and context. The response of acquiescence, for example, may require the organization (and its members) to accede to demands of the institutional environment and can result from habit (an unconscious adherence to taken-for-granted norms), imitation (conscious or unconscious), and voluntary compliance. Because acquiescence is essentially an act of conformity, Oliver suggested that organizations are highly likely to resort to more resistant strategies like compromise (i.e., a mild alteration of demands and/or responses), avoidance (i.e., circumventing, buffering, or escaping institutional influence), defiance (i.e., explicit rejection via dismissal or challenge), or manipulation (i.e., active alteration via co-option, influence, or control).

Kraatz and Block (2008) adapted and extended Oliver’s (1991) typology to specifically address how organizations respond to what they termed institutional pluralism. They propose that under conditions of organizational change, and in particular during periods of institutional plurality, there are multiple ways in which an organization can address its self-concept and purpose. First, the organization can eliminate pluralism by ignoring or resisting the new institutional logic and by preserving its original institutional logic. In this case, resistance is deployed (a la Oliver’s (1991) four resistance strategies) in the name of a strong commitment to a particular organizational identity and history (Kraatz and Block, 2008; King, Falin, and Whetten, 2010). The organization can also eliminate pluralism by favoring the new institutional logic, essentially denying the validity of or deleting the old institutional logic and embracing a new monolithic self-
concept (Pratt and Foreman, 2000). Second, the organization can attempt to balance the plurality of its institutional demands by loosely coupling its institutional logics or trying to increase cooperation between institutional logics. This would involve forging strategic linkages between institutional demands in order to work towards the same end (Pratt and Foreman, 2000; Binder, 2007) and effectively yields a multiple-identity or a “blended” hybrid organization. Third, the organization can decouple and “compartmentalize” its self-concepts and relate independently to its multiple constituencies (Kraatz and Block, 2008; Pratt and Foreman, 2000; Binder, 2007) yielding a “structurally differentiated” hybrid organization. Finally, the organization may “forge [a] durable identity of [its] own” and emerge as an “institution in [its] own right” (Kraatz and Block, 2008: 262). In this situation, the organization would, to an extent, detach from its institutional environment, make itself anew, and become self-reinforcing.

Pache and Santos (2010) build upon Oliver’s (1991) and Kraatz and Block’s (2008) models of response strategies to institutional pluralism by detailing the conditions under which different response strategies are likely to be utilized. Pache and Santos’s model, in contrast to the earlier models which largely ignored the role of internal organizational actors, focuses on how intra-organizational dynamics filter, alter, and inform responses to institutional complexity (Greenwood and Hinings, 1996). They recognize that although there may be institutional pluralism that does not necessarily mean there is problematic institutional complexity. In other words, just because multiple logics may be present and available to the organization that does not mean multiple logics are directly represented in the organization; not all situations of institutional pluralism are
equally complex. The relative power of logic's representation in the organization is of particular importance to determining degree of complexity.

Their model identifies organizational responses to situations in which the conflict between institutional logics goes unresolved at the field level and is internalized in the organization. They posit that the preferred organizational response strategies (acquiescence, compromise, avoidance, defiance, or manipulation) are dependent upon the nature of the demands and internal representation. They predict that organizational responses will vary based on whether the conflict is over “means only” disagreements (there is institutional/organizational agreement on the goals of the organization, but disagreement about the means or methods to achieve these goals) or “goals” disagreements (there is institutional/organizational disagreement about the goals the organization should pursue) and whether there are zero, one, or two or more conflicting demands (Pache and Santos, 2010: 463-470). Their emphasis on the presence, representation, and power of the institutional logics underlines the importance of the internal political dimensions of the organization; the more balanced the power structure is, the higher the likelihood of organizational paralysis and breakup. Heimer (1999) similarly recognizes the role of power and status in the decision-making process of organizations, in particular the status of the logic “carrier.” Her analysis of the competing influences of law, medicine, and family in neonatal intensive care found that organizational actors who routinely participate in organizational decisions (e.g., the dominant carriers such as physicians in hospitals) are more influential than organizational
actors who are only part-time participants (e.g., non-dominant carriers such as parents of patients) (Greenwood et al., 2011).

These models of institutional pluralism and strategic responses to institutional complexity are helpful in that they take steps to systematically predict the influence of multiple logics in an institutional environment and connect that to organizational-level responses to complex, and potentially conflict-ridden, institutional environments. Nonetheless, these models are still predominantly outward-focused and problem-based; they are more concerned with organizational efforts to achieve social endorsement and legitimacy via external referents and less concerned with how multiple logics are reflected and refracted in the organization’s structures and, more importantly, the perceptions and practices of organizational actors. This is a critique that recent work in the institutional complexity, work, and ambidexterity literature has sought to rectify through advocating a practice-based approach to studying institutions.

*Adapting Structures and Practices*

The concept of institutional work describes "the purposive action of individuals and organizations aimed at creating, maintaining, and disrupting institutions" (Lawrence and Suddaby, 2006: 215) and the concept of institutional ambidexterity describes the ability to "simultaneously perform contradictory processes when both are critical to organizational success" (Jarzabkowski et al., 2013: 45).\(^{104}\) As arms of institutional theory, ambidexterity literally means the ability to use one’s hands equally well. Organizational and management scholars have appropriated this term and leveraged this metaphor to deal with paradoxes; such as how organizations can simultaneously engage in both *exploitation* and *exploration* (March, 1991; Tushman and O’Reilly, 1996). Exploitation refers to an organization’s ability to be *aligned and efficient* with current business demands while exploration refers to an organization’s ability to be *adaptive to changes in the environment* (Raisch and Birkinshaw, 2008: 685).
these two concepts are at the forefront of efforts by institutional theorists to establish a broader vision of individual agency in relationship to organizations and institutions. They represent components of a practice-based approach to the study of organizations and an alternative response to institutional complexity. Such an approach focuses on how institutional pluralism is reflected in the structure and practices of organizations (Greenwood et al., 2011) and sits in contrast to strategy-based approaches of identifying and predicting organizational responses to institutional pluralism.

Practice Approach

A practice-based approach to institutions (Battilana and D'Aunno, 2009; Jarzabkowski, Matthiesen, and Van de Ven, 2009; Lounsbury and Crumley, 2007; Smets, Morris, and Greenwood, 2012) is particularly well-positioned for generating actionable insights into the relationship of organizational and institutional life and is particularly relevant in institutionally complex settings, in which coexisting and potentially conflicting logics are part of the ordinary, everyday nature of work, rather than exceptional phenomena (Jarzabkowski et al., 2009: 289) (Jarzabkowski et al., 2013: 37). This approach focuses on explaining the relationship between human action and the cultures and structures in which actors are embedded (Bourdieu, 1997, 1990, 1993; Giddens, 1984). DiMaggio and Powell (1991), in their early call to explore practice as a micro-foundation for institutional research, suggested that this type of approach was needed in institutional theory because it would help institutional theorists to develop a
more balanced view of the relationship between actors and institutions.\textsuperscript{105} Although researchers did not immediately respond to DiMaggio and Powell\textsuperscript{\textsuperscript{o}}s call, they are now increasingly advocating for a practice-based approach.\textsuperscript{106}

Recent theory and research in this area (e.g., Jarzabkowski, 2005; Jarzabkowski, Balogun, and Seidl, 2007; Schatzki, 2001) directs attention to how local actors interact with, construct, and draw upon their context in their everyday activities and practices. There is an explicit and purposeful focus on the mundane: \textquote{\textit{how people engage in the doing of \textit{real work}} (Cook and Brown, 1999: 387), particularly in situations of institutional complexity. Recent examinations of institutional complexity using a practice-based approach to institutions include Jarzabkowski et al.\textsuperscript{\textsuperscript{o}}s (2009) study of market and regulatory logics in a telecommunications company, Smets et al.\textsuperscript{\textsuperscript{o}}s (2012) study of German and English professional logics in a law firm merger, and Zilber\textsuperscript{\textsuperscript{o}}s (2002) study of feminist and clinical logics in a rape crisis center, all of which focus on the practical coping of individual actors with multiple and potentially competing institutional logics in their everyday activities. Each of the studies takes actions, interactions, and negotiations between multiple individuals as their core unit of analysis (Jarzabkowski et al., 2013; Jarzabkowski et al., 2007) and considers the mutually reinforcing relationships between organizational actors, organizations, and institutions.

\textsuperscript{105} By drawing on a practice-based approach, DiMaggio and Powell (1991) thought that institutional theorists would be better able to find a mid-point between over- and under-socialized views of agency. Their advocacy of this approach came from their critique of the neo-institutionalism and institutional entrepreneurship perspectives respectively.

\textsuperscript{106} Lawrence, Suddaby, and Leca (2009: 5-6) suggest that little work in institutional theory has used a practice-based approach because 1) institutional studies of organization tend to accentuate the role of collective actors rather than individual actors and 2) the relative temporal orientation of action in the practice approach is short- or long-term, while the temporal orientation of action in institutional approaches is intermediate in nature. They introduce the concept of institutional work to mitigate these tensions.
Institutional Work

The concept of institutional work depicts institutional actors as reflexive, goal-oriented, and capable, focuses on actors’ actions, and strives to capture structure, agency, and their interrelations (Battilana, Leca, Boxenbaum, 2009). Scholarly work in the area is oriented around discovering how institutions are created, maintained, and disrupted and can be broadly divided into three categories: studies of how institutional work occurs (e.g., institutional entrepreneurship, political work, technical work, cultural work, practice work, boundary work), studies of who does institutional work (e.g., professionals, leaders, collectives), and studies of what constitutes institutional work (e.g., individual agency) (Lawrence, Leca, and Zilber, 2013). The crux of the concept of institutional work is on how actors engage in three distinct work practices: institutional creation, institutional maintenance, and institutional disruption.

Institutional creation examines how new institutions emerge and become established with corresponding institutional logics. It builds upon the concept of institutional entrepreneurship and primarily explores the kinds of actors who work to create institutions, the environmental conditions that surround their work, and the work strategies they employ (Garud et al., 2002; Greenwood et al., 2002; Hargadon and Douglas, 2001; Lawrence, 1999; Lounsbury, 2001; Maguire, Hardy, and Lawrence, 2004). It is the most studied form of institutional work. Lawrence and Suddaby (2006: 221) specify three types of work associated with creating institutions: “overtly political

107 For representative studies of how institutional work occurs see Slager, Gond, and Moon (2012), Perkmann and Spicer (2008), Zietsma and Lawrence (2010), and Dacin, Munir, and Tracey, 2010); who does institutional work see Suddaby and Viale (2011), Empson, Cleaver, and Allen (2013), Kraatz (2009), and Dorado (2013); and what constitutes institutional work see Battilana and D’Aunno (2009), Zundel, Holt, and Cornelissen (2013), and Smets and Jarzabkowski (2013).
work in which actors reconstruct rules, property rights and boundaries that define access to material resources, actions in which actors’ belief systems are reconfigured, and actions designed to alter abstract categorizations in which the boundaries of meaning systems are altered. Creation work is particularly relevant in the context of institutional pluralism where there is the potential for the generation of a new logic and/or the readjusting and reconfiguring of existing belief systems and meanings (Jarzabkowski, Matthiesen, and Van de Ven, 2009).

Institutional maintenance examines how institutions are self-reproducing, or actively created and re-created through everyday practice. It is the least studied and most overlooked form of institutional work. It is the most overlooked form of institutional work because it often occurs quietly due to the taken-for-granted status of institutions (Phillips and Malhotra, 2008; Scott, 2008). Lawrence and Suddaby (2006: 230) identify two main types of maintenance work, those that address the maintenance of institutions through ensuring adherence to rules systems and those that focus efforts on maintaining institutions by reproducing existing norms and belief systems. Jarzabkowski, Matthiesen, and Van de Ven (2009: 288) argue that the concept of institutional maintenance is especially pertinent to the study of institutional pluralism because when multiple, potentially contradictory logics coexist, it seems that any particular institution must continuously be maintained, in order to not be dominated by other competing logics.

Institutional disruption examines how institutions are undermined, disembodied, or disturbed. It occurs when existing institutions do not meet the interests of local actors
who are able to band together to interrupt institutional processes. Disruption work is often assumed to be a precursor for institutional change (Greenwood et al., 2002) or deinstitutionalization. Lawrence and Suddaby (2006: 235-237) name three forms of disruption work: ědisconnect[ing] rewards and sanctions from sets of practices, technologies, or rules, ědissociating the practice, technologies, or rules from its moral foundations, ě and ěundermining core assumptions and beliefs. ě Jarzabkowski, Matthiesen, and Van de Ven (2009: 289) propose disruption work is also important to understanding institutional pluralism because ěcompeting institutions may seek to disrupt each other. ě Few studies, however, have examined institutional disruption in the context of institutional pluralism because of the underlying assumption that any conflict or disruption is due to the ěshift ěfrom one dominant institution or logic to another. Consequently, the extent to which institutional disruption is possible, particularly if multiple institutions are legitimate and have the ability to maintain their logics, beliefs, and practices, has not been extensively studied.

A practice approach to the study of institutional work examines how institutions are created, maintained, and disrupted through the actions, interactions, and negotiations of multiple actors. Research applying the practice approach and the concept of institutional work to the study of institutional pluralism sit in contrast to prior studies of institutional pluralism which mainly focus at the field level of analysis and which view institutional pluralism primarily as source of institutional change either through
substitution, sedimentation, or synthesis of institutional logics. Jarzabkowski, Matthiesen, and Van de Ven (2009)’s real-time case study of a utility company and its constituent actors grappling with opposing market and regulatory institutional logics offers an alternative explanation for how organizations and organizational actors cope with institutional pluralism over time. They find that both the market logic and the regulatory logic remained intact and discrete throughout their longitudinal analysis and identified work practices through which organizational actors engaged with both logics and actively did creation work, maintenance work, and disruption work in their routine and day-to-day activities and decisions. For example, after discrete periods of institutional disruption, incompatibility, conflict, creation, there was, eventually, adjustment. Adjustment in the organization required the active maintaining and reinforcing of and adherence to both the market and regulatory logics. The authors ultimately conclude that under conditions of institutional pluralism, actors must continuously maintain opposing institutional logics, which requires them to engage in the politicized work of creating their own institutional logic and disrupting the opposing logic (Jarzabkowski, Matthiesen, and Van de Ven, 2009: 313). They thusly show the possibility for ongoing situations of institutional pluralism and complexity, mutual maintenance and interdependencies between multiple logics, and the potential for organizational actors to exercise agency in their everyday practices and shape organizational responses, organizations, and institutions.

108 As previously noted, many studies of institutional pluralism posit that pluralism is a source of institutional change. Change can happen via substitution (an existing institutional logic is replaced by a new institutional logic), sedimentation (a new institutional logic is layered over an existing institutional logic), and synthesis (reconciliation of an existing institutional logic with a new institutional logic).
Institutional Ambidexterity

The concept of institutional ambidexterity emerged as mechanism to address the extraordinary challenge of individuals and organizations to develop the simultaneous capacity to engage in two (or more) predominant beliefs and practices and with two (or more) distinct institutional logics. It represents a different approach to studying organizational responses to institutional complexity because it does not portray multiple logics as fundamentally incompatible or emphasize the "paradoxical cognitive frames" (Smith and Tushman, 2005), "inherent contradictions" (Lavie et al., 2010), or "paradoxical challenges" (Jansen et al., 2009) of institutional pluralism and complexity. Instead, research in this area focuses on the adaptation of organizational structures and practices, particularly by organizational actors, to manage and potentially benefit from the presence of multiple, potentially contradictory, logics.

Structural Ambidexterity

Greenwood et al. (2011) point to the development of hybrid organizational structures as an adaptation to the management of institutional complexity. They argue that the development of "blended" and "structurally differentiated" hybrid organizations (Simsek, 2009) resonate with the organizational ambidexterity literature which focuses on the simultaneous development of organizations to functionally both "exploit" and "explore" (March, 1991; Tushman and O'Reilly, 1996). They state: "[Blended hybrid organizations] seek to synthesize processes of exploitation and exploration within the same organizational unit, whereas [structurally differentiated hybrid organizations] partition compartmentalize them into separate units" (Greenwood et al., 2011: 352).
Hybrid organizations may be better suited organizational structures to address the beliefs and activities required of multiple institutional logics.

Blended hybrid organizations layer institutional logics and manage organizational responses to institutional pluralism and complexity through acts of reflexivity and agency. Organizational actors “wittingly” (Greenwood et al., 2011; Boxenbaum and Jonsson, 2008) or consciously, purposefully, and with awareness combine and integrate beliefs and practices from multiple institutional logics. This is adaptation is akin to the organizational responses of “loose coupling” (Kraatz and Block, 2008) and “forging strategic linkages” (Pratt and Foreman, 2000; Binder, 2007) that may ultimately result in a synthesis of institutional logics. Important questions remain, however, regarding how multiple institutional logics are effectively “blended” and managed by organizational actors and the organization. Research by Battilana and Dorado (2010) on successful and unsuccessful adaptations of organizational structures and practices in two microfinance banks in Bolivia suggests that this type of adaptation is only possible in cases where organizational members do not have any attachments to or prior experience with the logics; leading to the conclusion that blended hybridization is only possible in new organizations (Greenwood et al., 2011).110

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109 Greenwood et al. (2011) liken blended hybrid organizations to the “inhabited institutions” perspective (Hallet and Ventresca, 2006), but question whether this type of hybrid organizational structure ultimately becomes institutionalized within the organization resulting in “uncontested settlements” (Rao and Kenney, 2008) or exist with ongoing tension and conflict that must be managed by ongoing practices of agency and reflexivity. Similarly, Jarzabkowski, Smets, and Bednarek (2013) question whether blended hybridization will ultimately produce “slippage” towards either logic.

110 Greenwood et al. (2011) go on to suggest that the construction of organizational identity is an important mechanism through which organizational responses to institutional complexity are determined. This echoes sentiments from other institutional theorists (e.g., Thornton, Ocasio, and Lounsbury, 2012; Creed, DeJordy, and Lok, 2010; Glynn, 2008; Kodeih and Greenwood, 2013; Kraatz and Block, 2008; Lok, 2010; Rao et al., 2003).
Structurally differentiated hybrid organizations separate, compartmentalize, or partition an organization so that different levels, units, or persons deal in specific logics (Anand, Gardner, and Morris, 2007; Kraatz and Block, 2008; Pratt and Foreman, 2000). This organizational response essentially decouples potentially conflicting logics and creates organizational ambidexterity by default. This type of hybrid organization is fairly common (e.g., universities, hospitals, multinational corporations) though relatively understudied. Recent inquiries in the area have focused on the relationships between differentiation and integration (e.g., Binder, 2007; Reay and Hinings, 2009; Jarzabkowski et al., 2009; Goodrick and Reay, 2011), boundary management (e.g., Carlile, 2002; Ferlie et al., 2005; Simsek, 2009), and identity and leadership (e.g., O’Reilly and Tushman, 2004; Jansen et al., 2009; Fang, Lee, and Schilling, 2010; Kraatz, 2010, and Pratt and Kraatz, 2010). Institutional theorists’ understanding of how ambidexterity functions in these organizations, however, remains very limited because of the literature’s almost singular focus on controlling and containing the effects of multiple logics by separating and compartmentalizing those who use them. A spate of studies in the identity and leadership literature assessing the possibility of ambidexterity in structurally differentiated hybrids, for example, only focus on institutional ambidexterity in the upper ranks of the organization (e.g., exalting the importance of the ambidextrous leader who has the ability, authority, and skills to manage the complex terrain of multiple logics) rather than assessing practical adaptations to institutional complexity on the ground with the people who actually do the day-to-day work of the organization.

111 One might question whether these organizations are ambidextrous at all because of the emphasis on compartmentalization and separation rather than integration.
Practice Ambidexterity

The aforementioned critique is at the center of an adapted article by Jarzabkowski, Smets, and Bednarek (2013) which seeks to expose the empty promise of ambidexterity and get institutional work to work by advocating a practice-based approach to the study of institutional ambidexterity at the individual and organizational levels of analysis. They state: In order to fulfill the promise of the institutional ambidexterity concept, we need an approach that leverages institutional complexity in practice (3), one that depart[s] from previous approaches that saw institutional complexity as problematic and focused on resolving conflict by keeping apart people, practices, or audiences that followed contradictory logics (e.g., Greenwood and Suddaby, 2006; Seo and Creed, 2002; Smets et al., 2012) (2). Their practice-based and benefits-based approach relies upon an embrace of complexity and awareness that multiple logics are interdependent yet also contradictory (Friedland and Alford, 1991:250).

A practice approach to the study of institutional ambidexterity examines alternative organizational responses to institutional complexity; in particular, ambidextrous responses that integrate practices derived from two or more potentially contradictory logics and which permanently remain interdependent yet separate.

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112 Jarzabkowski, Smets, and Bednarek (2013) stress the difference between the concept of organizational ambidexterity and institutional ambidexterity. Organizational ambidexterity is characterized as a strategic organizational resource that is associated with organizational performance (Gibson and Birkinshaw, 2004; He and Wong, 2004; Simsek, 2009; Tushman and O'Reilly, 1996), is achieved via organizational structure (e.g., O'Reilly and Tushman, 2004; Tushman and O'Reilly, 1996), organizational culture/context (e.g., Birkinshaw and Gibson, 2004), or leadership (e.g., Carmeli and Halevi, 2009; Jansen et al., 2009), and is virtually synonymous with structurally differentiated hybrids (Greenwood et al., 2011: 355). Institutional ambidexterity, in contrast, has an explicit focus on integration, spans multiple levels of analysis, and is interested in doing (Jarzabkowski, Smets, and Benarek, 2013: 7-10).
These responses emanate from organizational actors who share a practical understanding and in their actions, interactions, and negotiations constitute and re-constitute multiple institutional logics. Thus, this approach recognizes that institutions themselves cannot be ambidextrous; rather, people do institutional ambidexterity in their everyday actions and interactions as they work within and enact multiple logics (Jarzabkowski, Smets, and Bednarek, 2013: 11).

Four potential examples of practical understandings (i.e., people’s performances or doing) of institutional ambidexterity include: expanded practice repertoires, situated improvising, mutual adjustment, and switching (Jarzabkowski, Smets, and Bednarek, 2013: 13-15). Expanded practice repertoires refer to organizational actors’ enactment of practices relevant to the multiple institutional logics comprising the organizational environment in addition to newly created hybrid practices (Smets and Jarzabkowski, 2013). It shows the generative capacity of institutional complexity (Kraatz and Block, 2008) and a cultural and practical expansion of an organizational actors’ toolkit (Swidler, 1986). Situated improvising refers to organizational actors’ spontaneous adjustments of their actions and practices in institutionally complex contexts. These adjustments may be made because of the urgency the situation and the need to get work done (Smets et al., 2012). Mutual adjustment (Jarzabkowski, Matthiesen, and Van de Ven, 2009; Lindblom, 2013).

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113 It is the sustained separation of logics that differentiates ambidextrous responses from a structural response like blended hybridization.
114 Jarzabkowski, Smets, and Bednarek (2013) practice model of institutional ambidexterity proposes practical understanding or the know-how and embodied repertoires that compose a practice (Schatzki, 2002: 77-78) as the ideal unit of analysis because they are grounded in actors’ actions and encompass the tacit knowledge that often goes unarticulated in collective practice.
1965) refers to organizational actors’ alterations or accommodations to contradictory institutional logics. Such an adjustment may be marked by a tolerance to or recognition of another’s beliefs, actions, or practices (Jarzabkowski, Matthiesen, and Van de Ven, 2009). Finally, switching refers to organizational actors’ ability to move between multiple institutional logics by enacting them at different times or in different spaces. The logics themselves remain distinct and discrete and are purposefully called upon given a situation or context.

Summarily, research in institutional theory suggests three broad organizational responses to institutional pluralism and complexity: organizational change, contested coexistence, and ambidexterity. The first two responses, organizational change and contested coexistence, are predominantly strategy, reactionary, and problem-based approaches while the latter response, ambidexterity, is a practical, proactive, and benefits-based approach. Although little empirical research has been conducted using a practice-based approach to institutional complexity that incorporates the concepts of institutional work and institutional ambidexterity, I believe that this type approach is appropriate for this research because it considers the role of organizational actors and is better able to reveal the practice of institutional logics on the ground and in action.

Data Collection & Analysis

I use the same qualitative interview, observation, and textual data specified in Chapter Three: Identifying, Explaining, and Defining the Logics of Homeownership. In keeping with the findings of that chapter, I understand that there are two dominant, accessible, and functionally contradictory institutional logics culturally embedded in the
institutional environment of homeowners’ associations. The economic logic of homeownership views homeownership as a financial investment and appeals to an individual’s pursuit of self-interest. Homeowners’ association board members adhering to this logic view the homeowners’ association as a corporation, homeowners as investors, and will make decisions to maximize short-term returns on their investment. The social logic of homeownership views homeownership as a civil investment and appeals to a collective’s pursuit of community. Homeowners’ association board members adhering to this logic view the homeowners’ association as a family business, homeowners as neighbors, and will make decisions to benefit the long-term interests of the community. Homeowners’ associations thus exist in an institutionally pluralistic and complex environment facing the enactment of both the economic logic of homeownership and the social logic of homeownership.

As noted in Chapter Two: Structure v. Culture: The External and Internal Determinants of Conflict, of the 176 board members responding to my original Homeowners’ Association Survey, approximately 46% reported their association experienced at least one significant instance of conflict in the prior 12 months. Data was collected and divided into two discrete data sets. The first data set comprised survey, interview, observational, and textual data with more conflicted homeowners’ associations and the second data set comprised survey, interview, observational, and textual data with less conflicted homeowners’ associations. I distinguished between “more conflicted” and “less conflicted” associations using responses to several survey questions designed to

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115 For a full description of the economic and social logics of homeownership see Chapter Three: Identifying, Explaining, and Defining the Logics of Homeownership.
measure the presence and dimensions of conflict such as How many times in the last year has your board experienced a significant instance of disagreement regarding the proper course of action for your association? How many times in the last year has your association issued a notice of non-compliance? How many times has the association been threatened with or involved in a legal dispute in the last five years? I followed up with 80 participants (40 respondents each from less and more conflicted associations). Of those 80 participants that I requested to interview, 56 consented to the interview (30 respondents from the most conflicted and 26 respondents from the least conflicted associations). Qualitative data from these two data sets were gathered, coded, analyzed, and compared to decipher the appreciable differences in the actions, practices, and responses of organizational actors to institutional pluralism and complexity that could account for and explain the differences in the variability of intra-organizational conflict the organizations reported experiencing.

Interview, observational, and textual data comprising the unfolding decisions, interactions, and practices between organizational actors in more conflicted and less conflicted homeowners' associations as they attempt to cope with institutional pluralism and complexity occasioned by the economic and social logics of homeownership are the

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116 In general, more conflicted homeowners' associations reported experiencing at least one significant instance of conflict in the prior 12 months, reported experiencing at least one significant instance of disagreement regarding the proper course of action for the association in the prior 12 months, reported issuing at least one notice of non-compliance in the prior 12 months, and/or had been threatened with or involved in at least one legal dispute in the last five years and less conflicted homeowners' associations did not report experiencing at least one significant instance of conflict in the prior 12 months, did not report experiencing at least one significant instance of disagreement regarding the proper course of action for the association in the prior 12 months, did not issue at least one notice of non-compliance in the prior 12 months, and/or had not been threatened with or involved in at least one legal dispute in the last five years.

117 A table (C-1) detailing the descriptive characteristics of my interviewees may be found in Appendix C.
basis of my analysis in this chapter. In addition to my incorporation of a practice perspective and “practical understandings” (Jarzabkowski, Smets, and Bednarek, 2013) as my unit of analysis, I continue to use an inductive, grounded theory approach to data analysis looking for organizational actors’ invocation and use of both institutional logics, and evidence of practices associated with institutional work (Lawrence and Suddaby, 2006; Jarzabkowski, Matthiesen, and Van de Ven, 2009) and institutional ambidexterity (Jarzabkowski, Smets, and Bednarek, 2013; Jarzabkowski et al., 2013) and intra-organizational conflict. While I did keep an open mind to emergent themes and codes in the data, these conceptual models and theoretical concepts informed my coding judgments.

**Explaining Conflict in Homeowners’ Associations**

My qualitative research reveals that all homeowners’ associations exist in institutionally pluralistic and complex institutional environments (i.e., all exhibit evidence of the simultaneous presence and accessibility of the economic logic of homeownership and the social logic of homeownership). How board members of homeowners’ associations respond to institutional pluralism and complexity, however, varies. I contend that organizational responses to institutional pluralism and complexity, in particular those actualized in organizational actors’ perceptions and practices, explain the variability in intra-organizational conflict. Homeowners’ associations that respond to institutional pluralism and complexity by eliminating or compartmentalizing logics are more conflicted. Board members in eliminatory and compartmentalizing homeowners’ associations, what I will call non-ambidextrous organizations, perceive the simultaneous
presence and accessibility of multiple institutional logics as novel and instinctively treat it by disrupting and disusing one or more institutional logics. They do this by contesting or separating one or more logics. In practice this response creates a self-reinforcing cycle of problem and contestation and ultimately results in an incongruous organizational vision and more intra-organizational conflict. Homeowners’ associations that respond to institutional pluralism and complexity ambidextrously are less conflicted. Board members in ambidextrous homeowners’ associations perceive the simultaneous presence and accessibility of multiple institutional logics as routine and purposefully do logics to lessen conflicts. They actively maintain and use both the economic logic of homeownership and the social logic of homeownership and do logics by making adjustments, improvising, and switching between logics on a context-specific basis. In practice this response creates a self-reinforcing cycle of ambidextrous action and ultimately results in a congruous organizational vision and less intra-organizational conflict. Table 4-1 summarizes the major characteristics of non-ambidextrous and ambidextrous organizations and Figure 4-2 diagrams my causal model.

Elimination/Compartmentalization as a Response

Homeowners’ associations that respond to institutional pluralism and complexity by eliminating or compartmentalizing logics are more conflicted. The non-ambidextrous nature of their response is reflected in their perceptions (beliefs) and practices (actions). Board members in non-ambidextrous homeowners’ associations perceive the simultaneous presence and accessibility of multiple institutional logics usually during
Table 4-1: Major Characteristics of Non-ambidextrous and Ambidextrous Organizations

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Non-ambidextrous</th>
<th>Ambidextrous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institutional pluralism</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Institutional complexity</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Organizational actors' responses to pluralism and</td>
<td>Elimination</td>
<td>Ambidexterity</td>
</tr>
<tr>
<td>complexity</td>
<td>Compartmentalization</td>
<td></td>
</tr>
<tr>
<td>Organizational actors' perceptions of pluralism and</td>
<td>Novel</td>
<td>Routine</td>
</tr>
<tr>
<td>complexity</td>
<td>Multiplicity is a problem</td>
<td>Multiplicity is a benefit</td>
</tr>
<tr>
<td>Organizational actors' responses to pluralism and</td>
<td>Instinctual</td>
<td>Purposeful</td>
</tr>
<tr>
<td>complexity</td>
<td>Disruption work</td>
<td>Maintenance work</td>
</tr>
<tr>
<td></td>
<td>Contestation, separation</td>
<td>Adjustment, improvisation, switching</td>
</tr>
<tr>
<td>Organizational actors' recognition of pluralism and</td>
<td>Change, uncertainty, ambiguity, and crisis</td>
<td>Always, continuously, and continually</td>
</tr>
<tr>
<td>complexity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational outcome</td>
<td>More conflict</td>
<td>Less conflict</td>
</tr>
</tbody>
</table>
Figure 4-2: Organizational Responses to Institutional Complexity in More and Less Conflicted Homeowners’ Associations

Presence of Economic and Social Logics of Homeownership
(Institutional Pluralism)

Simultaneous Presence and Accessibility of Economic and Social Logics of Homeownership
(Institutional Complexity)

Organizational Actors’ Responses

**Elimination / Compartmentalization**

*Perceptions:*
- Novel
- Multiplicity is a problem

*Practices:*
- Instinctual
- Disruption work
- Contestation / Separation

**Ambidexterity**

*Perceptions:*
- Routine
- Multiplicity is a benefit

*Practices:*
- Purposeful
- Maintenance work
- Adjustment, improvisation, switching

More Conflict

Less Conflict
times of change, uncertainty, ambiguity, and crisis, and treat it as novel. They instinctively rectify this “problem” by disrupting and disusing one or more alternative institutional logics. They do this by contesting or separating one or more institutional logics in an effort to maintain the dominance of a single logic. In practice this response creates a self-reinforcing cycle of problem and contestation and ultimately results in an incongruous organizational vision and more intra-organizational conflict.

Perceptions

Board members in non-ambidextrous homeowners’ associations regard the simultaneous presence and accessibility of multiple institutional logics as novel. They exhibit a singular understanding of their organization and will often either frantically fight to maintain their organizational vision or will succumb to the dominance of a new or alternative organizational vision. Organizational actors do not see the possibility for the co-existence of two organizational visions and thus multiplicity is a problem. Board members instinctively disrupt new and alternative institutional logics by contesting and separating institutional logics. They do this to maintain the dominance of a single logic. The following petition for a special election placed under the doors of a large Boston-area homeowners’ association exemplifies the embedded response of board members who adhere to a single institutional logic and the reactionary response of holders of alternative logics (emphasis in original):

Petition for Election

Bad things will happen when good people do nothing.

Dear neighbors,
We would like to ask for your support to call for a Bellvue Condominium Trust 7th trustee election and a Special Meeting.¹¹⁸

The reason we are asking for a signed petition and a special meeting is the recent board decision to appoint the 7th board member rather than through the election process.

Last year two board members, Nancy Pillham and Ronald McArthur unlawfully ejected three active board members from the voting process and appointed three new board members.

They got away with this because they knew people believe or want to believe the board is acting in our best interests.

Today, a year later, the board members are repeating the same troubling and solitary action. Why are they doing this? The real intent is to insert a board member that they are comfortable with and able to control.

We are concerned that these board members can potentially return us to an era of mismanagement and corruption that many of you still remember.

According to the By Laws a petition to vote and hold a special meeting may be called upon via written application of the unit owners.

If you want to support our community please sign the petition and return to our community manager.

This petition, laden with meaning from and prompted by organizational memory on the part of the writer, communicates a sense of urgency from one unit owner to other unit owners, or his or her neighbors, to intervene in the governance of the association to prevent mismanagement and corruption. These charges, both in their language and in their context, insinuate the incompatibility of two types of organizational actors (non-board member unit owners and board members) and their respective beliefs and practices with regard to the purpose of the organization. Board members via their alleged emphasis

¹¹⁸ Names of homeowners' associations, interviewees, and other potential identifiers have been replaced with pseudonyms to protect confidentiality.
on control, self-interest, and passivity on the part of non-board member unit owners are implied to represent the economic logic of homeownership. Their choice to “unlawfully eject” some board members and “appoint” new board members could be interpreted as an attempt to disrupt, disuse, marginalize, or altogether eliminate other understandings and viewpoints in service of maintaining the dominance of their understandings and viewpoints. Meanwhile, the writer of the petition, presumably a non-board member unit owner, through his or her allusions to shared interests, community, and neighborliness, references the social logic of homeownership. It is this logic which is continually muffled and silenced as a result of the belief by present board members that multiplicity is a problem.

A different but common example of the perceived problem caused by the simultaneous presence and accessibility of multiple institutional logics occurs when homeowners’ associations set out to hire a manager or management company. A long-time board member of a very small homeowners’ association recounts his decision to hire a manager and the subsequent transition of management:

So I’ve been primarily running the association for as long as I’ve lived here. It can be a lot of work, but I could always handle it. Well recently my mother became ill and most of my spare time has been spent caring for her. So I approached the other unit owners and said “Do you want to take over or do you want to hire a manager?” We all agreed to hire a manager. Wow. What a change. It was much more difficult than I anticipated. I’ll tell you, it was equal parts frustrating, disconcerting, and maddening. At one point I thought it would be just best if we fired him. Sometimes I still think about it!

When probed for more detail about why the transition was much more difficult than he expected he responds:
Well he [the new manager] came in guns blazing talking codes, new legislation, voting quorums, reserve studies—this, that, and the other thing. That just wasn’t my style. I’m not schooled in this but our association, I believed and as far as I know other unit owners have believed that our association and our homes have been well cared for. I was exceedingly surprised by his want and need to depersonalize our association and make it a business. I still am. If I could I think that I would fire him and go back to the way things were, before everything was about the money.

His recounting of the difficulty of the transition in management of the association highlights incompatible practical understandings of the homeowners’ association. The introduction of a new way of thinking and doing, marked by differences in languages, beliefs, and practices particularly one smacking of the economic logic of homeownership depersonalized the association for this board member who had long utilized a less formal and more personal social logic of homeownership. His beliefs, decisions, actions, and practices were profoundly marked by an ideological identification with the association and an emphasis on building community. For example, when I asked him about how he managed the association on a day-to-day basis he reported that he would often discuss association matters in passing, "out on the stoop, at the mailbox, or even on line at Trader Joe’s (a local supermarket)." The new manager, although wanted and needed, brought with him a different way of thinking and doing and a different perspective about the purpose of the homeowners’ association. He wanted to "make it a business," formalize the decision-making process, and build the financial and business profile of the association.

When I followed-up with this board member six months later and asked about how the association is managed now, my board member concedes that it is different now. He says that he has largely "let go" of his style of management and relinquished
control due to “massive and frequent” disagreements between himself and the manager. When asked about what the biggest change was he states: “There are fewer meetings out on the stoop. I have new neighbors, but I really don’t even know them. We don’t really have any reason to talk to each other now. The manager he takes care of everything and it’s all just really… I don’t know… formal I guess? Business-like? Professional? I mean it’s not an overly bad thing I guess, everything is taken care of and I have more time to focus on my mom. I guess all I can say is that it feels different.

Just as in the first example, this board member regards the simultaneous presence and accessibility of multiple institutional logics as problematic (as do other organizational actors such as presumably that of the referenced homeowners’ association manager). He is surprised by the existence of and reliance upon the economic logic of homeownership by the newly hired manager and does not see the opportunity for the co-existence of two organizational visions. As a result of this perception, both situations ultimately result in the elimination or compartmentalization of one of the logics of homeownership and the eventual acquiescence to a single dominant logic. In the first example, board members forcibly maintain the dominance of the economic logic of homeownership by appointing only those who share their understandings of the organization and, in the second example, the former manager and board member succumbed to the presumed power and dominance of the newly contracted manager and his invocation for the economic logic of homeownership instead of advocating for the continued dominance of the social logic of homeownership or the co-existence of both the economic and social logics of homeownership.
Practices

The practices and actions of organizational actors also create the potential for more and less intra-organizational conflict. Board members in non-ambidextrous homeowners’ associations perceive the simultaneous presence and accessibility of multiple institutional logics problematically and instinctively respond by trying to rectify the “problem” of multiplicity through disruption work. They do this by contesting or separating one or more alternative institutional logics in an effort to maintain the dominance of a single logic. The elimination and compartmentalization of institutional logics creates more intra-organizational conflict. Table 4-2 provides representative examples of organizational actors’ eliminatory and compartmentalizing responses to institutional pluralism and complexity.

Organizational actors in non-ambidextrous organizations perceive the simultaneous presence and accessibility of multiple institutional logics primarily during times of change, uncertainty, ambiguity, and crisis. It may happen when a new external actor introduces a new institutional logic (as in the previous section when a board member of a small homeowners’ association who utilized the social logic of homeownership hired a professional manager who brought with him the economic logic of homeownership), when there is a change in leadership, when there is a change in the material conditions of the organization, or even there is a substantial turnover in the makeup of the members of an organization. The introduction of change or even the potential for change in an organization may create the conditions for the employment of multiple logics where there was previously only a single dominant logic (available and/or
Table 4-2: Representative Examples of Organizational Actors’ Eliminatory and Compartmentalizing Responses to Institutional Pluralism and Complexity

<table>
<thead>
<tr>
<th>Elimination / Compartmentalization</th>
<th>Contestation</th>
<th>Separation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Of social logic:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ÑWe don’t need to deal in personal relationships. That isn’t our responsibility. I enforce the rules for the economic benefit of the association. That’s all I care about. Ñ</td>
<td></td>
<td>ÑWe are concerned about the money—the budget, the reserves, the bottom line. Our rules preserve our profit. Personal relationships are nice, but that’s not our main responsibility, it doesn’t get us a profit. Ñ</td>
</tr>
<tr>
<td><strong>Of social logic:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ÑIt is the fiduciary responsibility of the business that is my key priority. Sociality and such is unnecessary fluff. Ñ</td>
<td></td>
<td>ÑThere is a social committee that plans parties and stuff. They are separate from us. It’s OK to have that kind of stuff, but that’s not the board’s work. Ñ</td>
</tr>
<tr>
<td><strong>Of social logic:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ÑTo me a homeowners’ association is a service business and board members are business leaders. We know this is a business. Some people try to add community building aspects to the job and I don’t really see how that is as important. My job is to keep us efficient and profitable. Ñ</td>
<td></td>
<td>ÑYeah, we have a social committee, but we generally consider this committee as independent of the board. We set the rules and govern the committee, but it’s not us. We are the meat of the association. The social committee is the garnish. They are the parsley. Ñ</td>
</tr>
</tbody>
</table>
directly represented). In these situations there is an absence of consensus and frustration about divergent expectations, beliefs, and practices. In the following case, I observed the first meeting of a homeowners’ association board following the election of three new board members.

*Board chairman (continuance of term):* Welcome to the monthly meeting of the 70/80 Birchwood Road Trust. I’d like to congratulate the incoming board members on winning the election and thank outgoing members for their years of service. We’ll use this meeting to transition from the old board to the new. I guess the first order of business would be to address any questions you might have about your new positions and to get you up-to-date on association matters. Does anybody have any questions?

*New board member #1:* Well I guess what I would like to know is, what are our main responsibilities?

*Board chairman:* Well, first, uh, let me state the obvious. Our main responsibility is and has always been the financial management of the trust. We need to watch out for and protect our investments. That is all of our jobs: to act in the best interests of the trust.

*New board member #2:* Can I add to that? I appreciate the importance of financials, but part of the reason I wanted to be on the board was to do some community building. Isn’t that a main responsibility of the board too? I’d really like to think about doing things like having an ice cream social or setting up a book library down in the community room where we can take a book/leave a book or even like, you know, set up a social committee to welcome new owners. Down the line I’d even like to set up a fully functioning website.

*Board chairman:* [Laughs and gives an incredulous look to an outgoing board member] Wow—those are some new ideas and, forgive me, but it might be necessary to say, a little bit frivolous to talk about at this juncture. We really need to be talking about our budget, the end of the year financials, and our upcoming reserve study. So maybe I was getting ahead of myself here. Why don’t we just start with that, that way we will all be on the same page; then maybe we can address any questions you might have. I’ll hand it over to Steve Levinson (the association’s financial advisor) to go over some of our operating documents [he starts handing out a packet of papers to the incoming board members].

*New board member #2:* Hi Steve. I look forward to your presentation, but first can I just need to say this. I think that whole exchange was just
unnecessarily rude and dismissive. I really felt like a chastised little girl and that was wholly unnecessary. We are adults and I do not think my ideas were in any way frivolous or unwarranted. You were at the open meeting. You saw how upset people were with the board. You seem to think that you did a very good job, but not all would agree. I would appreciate it if you were just as receptive to my ideas as I am to yours.

*Board chairman:* Hey now, I'm just talking from experience. We have to pay the bills first. We can get together and get to know people second. It is what it is. Now Steve, what were you saying last time about what we need to get together for the reserve study? Were you saying it was of very high importance?

This exchange is notable for several reasons. First, it is taking place during a moment of change—the changeover from one governing board to the next. Second, one of the new board members (board member #2) is introducing an alternative logic or way of thinking about homeownership and the purpose of the homeowners' association. Her way of thinking and doing conflicts with the board chairman’s way of doing and the tension between the two is palpable. Third, the board chairman reacts to the alternative way of doing in such a way that suggests that he perceives that the norms of his logic have been egregiously violated. His instinctual response is to prevent or contest any change in thought or action. And, fourth, despite the new board member’s resistance, he is able to invoke and reassert the importance of the economic logic of homeownership by referencing his prior experience and re-framing the discussion by linking to an external referent (i.e., the association’s financial advisor). In doing so he has, at least temporarily, maintained the dominance of the economic logic of homeownership and disrupted and contested the introduction of an alternative logic, the social logic of homeownership.

A second illustration of an organizational actor perceiving the simultaneous presence and accessibility of multiple institutional logics as problematic during a time of
change, uncertainty, ambiguity, and crisis is exemplified by the following homeowners’ association manager’s account of ongoing on-and-off tension and incompatibility between himself and a mid-size homeowners’ association board.

It comes out of nowhere. And it always gets me. It just happens and it just out of the gate hostile again. Just rude you know. It really demoralizing and during those times it gets so bad that I think of quitting. I can’t tell you how many times I’ve thought of quitting. It just really gets to you. But then it’s gone, or at least manageable. I wouldn’t say rosy, but you know easier.

Upon some probing and discussion I get him to detail the circumstances under which incompatibility and hostility arises. What I find out is that it usually does not just occur out of nowhere, but seems to happen soon after he sends out notices to unit owners regarding issues of non-compliance. For example, at the time of our interview he recently delivered a notice of a disposal fee to a long-time unit owner in the building, whom happened to be very good friends with several of the board members, for improper disposal of a large appliance. From what I gather, this unit owner placed an old television on the loading dock over the weekend by the trash receptacles. It is apparently against the association’s rules and regulations to do so, so the manager watched video surveillance footage of the loading dock to find the culprit and then issued a notice of noncompliance which proclaimed the unit owner must retrieve the television or pay a $50 disposal fee. The manager did not hear from the unit owner the next day so he assumed the unit owner wanted the television disposed of and so did so. The unit owner later went down to the loading dock to retrieve the television and found it gone. This set off the unit owner who did not wish to pay the disposal fee. He [the unit owner] went to the board and vehemently complained about the actions of the manager. The board then
approached the manager with hostility accusing him of "acting without proper authority" and "disrupting personal relations." The ambiguous set of circumstances involved did the manager or didn't the manager have the proper authority to act with discretion in his adherence to the association's rules and regulations coupled with the collision of the manager's invocation of the economic logic of homeownership (as evidenced by his emphasis on rules and managerialism) with the board member's invocation of the social logic of homeownership (as evidenced in what the board member described to him as the "thoughtless" and "strict" following of the rules and the interference of community relationships) created a what this organizational actor perceived to be a novel problem. The failure or inability to fully recognize the presence and possible incorporation of the two logics of homeownership thus creates the conditions for sustained and ongoing on-and-off tension between the manager and the board.

In both of these cases, and as may be typical in non-ambidextrous homeowners associations, there was an element of surprise or dubiousness on the part of one or more organizational actors, who didn't anticipate or expect or, more importantly, thoughtfully respond to the invocation of another way of thinking and doing. Ultimately this led to an incompatibility between practical understandings of proper courses of thought and action. In the first case, the board chairman is incredulous that someone might consider community building as an important method of building the value of the homeowners association and in the second case, the manager is taken aback by his on-and-off designation of "the other," or his position as someone who the board can easily place blame upon because of the ambiguity of his position of authority in the
organization. Both, however, instinctively respond to the simultaneous presence and accessibility of multiple institutional logics by disrupting the invocation of an alternative institutional logic and contesting or separating one or more institutional logics. In each case organizational actors enact practices to eliminate or compartmentalize multiple institutional logics.

One of the ways in which organizational actors enact practices to eliminate or compartmentalize multiple institutional logics is to engage in institutional work—namely disruption work. My analysis reveals that organizational actors in non-ambidextrous homeowners’ associations were far more likely to engage in the institutional disruption of one or more institutional logics when compared to organizational actors in ambidextrous homeowners’ associations. Board members in non-ambidextrous homeowners’ associations were especially likely to engage in the practice of disrupting the creation or maintenance of the social logic of homeownership. In other words, board members in non-ambidextrous homeowners’ associations were more likely to assert and defend the dominance of the economic logic of homeownership rather than the social logic of homeownership and to engage in political acts to contest the enactment of the social logic of homeownership.

As shown in the previous sections, organizational actors in non-ambidextrous homeowners’ associations often perceive multiplicity as problematic and instinctively enact practices to contest or separate alternative institutional logics in an effort to maintain the dominance of a single logic. Organizational actors engage in disruption work by attempting to block the introduction and incorporation of new or additional
institutional logics and undermining the taken-for-granted assumptions, norms, beliefs, legitimacy, or value of new or alternative logics. Organizational actors may do this instinctually out of ignorance or in defense of their way of doing or, less commonly in my analysis, as a purposeful act of sabotage. In my data, I often found evidence of disruption work in the relative dismissal of the importance or value of the social logic of homeownership. The following interview excerpts represent some of many examples of disruption work in non-ambidextrous homeowners' associations:

To me a homeowners' association is a service business and board members are business leaders. We know this is a business and we operate as such. Some people try to add community building aspects to the job and I don't really see the value in that. In fact, I purposefully voted against the proposal to develop a social committee. What a waste of time.

It is the fiduciary responsibility of the business that is the key priority. Sociality and such is unnecessary fluff.

Yeah, we have a social committee, but we generally consider this committee as independent of the board. We set the rules and govern the committee, but it's not us. We are the meat of the association. The social committee is the garnish. They are the parsley.

I don't believe in leading by consensus. What a bunch of hooey. We are on the board. We were elected to be on the board. We don't need to play nice with everyone. We don't need to share the details of our decision-making process. We are here to do a job and as long as we are doing it that is what matters. The numbers [a reference to increasing property values] don't lie.

These beliefs also translate into concrete actions and practices. In the following example a board member unwittingly confides in me how his board sought to disrupt the social logic of homeownership despite the potential for a negative outcome:

Our board just imposed a major assessment on our 200 unit owners. The purpose of the assessment is to upgrade the sliding doors to the balconies. It's kind of tricky though because only about 80 of the sliding doors currently need to be upgraded; the other 120 are working fine. A couple of us on the board though
have the malfunctioning doors, so we just decided that we were going to do it. So we just passed through the assessment without going to a vote if we would have never got a quorum and our doors need to be replaced. So we just classified it as a repair, not an improvement. Sometimes those are the things you have to do. In the long run it'd better anyway. We won't have to keep paying for repairs as other doors start to malfunction. They'll get over it. If we sought a consensus on anything we would never get anywhere.

Laden in this board member's magical reasoning is a clear disruption of the social logic of homeownership which would call for a quorum to be met about whether or not the assessment should be levied. These board members were clearly acting in their own best interests rather that the community's best interests thereby undermining the core assumption of the social logic of homeownership. Their decision to classify the sliding door replacement as a repair rather than an improvement (the Master Deed of this association requires voters to approve “additions, alterations, or improvements,” but not repairs) clearly constitutes the practice of disruption work and effectively works in service of the elimination or compartmentalization of the social logic of homeownership.

*Ambidexterity as a Response*

Homeowners' associations that respond to institutional pluralism and complexity ambidextrously are less conflicted. The ambidextrous nature of their response is reflected in their perceptions (beliefs) and practices (actions). Board members in ambidextrous homeowners' associations always, continuously, and continually perceive the simultaneous presence and accessibility of multiple institutional logics as routine and purposefully doing logics to lessen conflicts. They actively maintain both the economic logic of homeownership and the social logic of homeownership and doing logics by making adjustments, improvising, and switching between logics on a context-specific
basis. In practice this response creates a self-reinforcing cycle of ambidextrous action and ultimately results in a more congruous organizational vision and less intra-organizational conflict.

Perceptions

Board members in ambidextrous homeowners’ associations regard the simultaneous presence and accessibility of multiple institutional logics as routine. They exhibit a multitudinous understanding of their organization and will work ably to maintain a congruous organization vision despite or because of the presence and accessibility of multiple institutional logics. Organizational actors see the possibility for the co-existence of two organizational visions, and see multiplicity as a potential benefit. Board members purposefully maintain multiple logics by making adjustments, improvising, and switching between logics as a situation requires. They do this to simultaneously address the concerns of multiple logics. Unlike the perceptions of organizational actors in non-ambidextrous homeowners’ associations, the perceptions of organizational actors in ambidextrous homeowners’ associations about institutional pluralism and complexity are subtle and nearly imperceptible, they are only revealed in a close analysis of the everyday practices of the association. Consider the following exchange I observed during a monthly meeting of the Forest Hills Condominium Trust:

*Board chairwoman:* The next matter on the docket is the issue of the number of rental units in the building. Over the past several years we have seen an increasing number of absentee owners and subsequent renters. Should we be concerned about this? What are your feelings on the matter?

*Board member #1:* I am concerned. Having lots of renters doesn’t look good – they don’t care as much about the property and don’t really know about the rules
and regulations. Are they going to decrease the value of the property? Are good prospective buyers going to buy other properties because of it?

Board member #2: I share those concerns; however, we really haven't had those types of problems. Plus, if anything, I've observed fewer problems with our renters than our owners. I don't remember a single complaint. Maybe the real concern is maintaining a high quality of renters; renters who are invested in the area and the community.

Board chairwoman: So maybe we can find some sort of middle ground here. Let's look into seeing if we can establish a minimum lease term—maybe two or three year commitments instead of one—or even a rent-to-buy type of structure. This way we can make sure we have people here who we know and see and who will be aware of our rules and who, maybe down the line, would ultimately buy in to the community.

The board chairwoman's response complements both the economic logic of homeownership (i.e., finding a way to limit the number of renters) and the social logic of homeownership (i.e., ensuring the long-term interests of the association by honoring the values of the community). She does not see the co-existence of both logics of homeownership as problematic, nor does she strictly assert the dominance of one of the logics of homeownership. For example, if she were to adhere purely to the economic logic of homeownership she might have decided to establish a rental cap by limiting the number or percentage of units that can be rented or restricted the number of units a single individual could own and if she were to adhere purely to the social logic of homeownership she might have decided to poll the community for their input and placed the power of the decision in the hands of a quorum of unit, constituent voters. The notable point is her virtually seamless, simultaneous, and purposeful acknowledgement, adjustment, and incorporation of both logics and their distinct concerns in the decision-making process and in the ultimate decision.
A similar acknowledgement and management of the two logics of homeownership happens in everyday decisions about ordinary association matters like noise and unruly behavior violations. These matters certainly have the potential to be viewed problematically and spark sustained frustration, annoyance, and incompatibility; however, board members in ambidextrous associations offer practiced, balanced, and deliberate responses because of their perception that multiplicity can be beneficial to the organization. In the following passage, for example, a board member comments upon his association’s management of noise violations.

Noise violations are a common problem. You know we live in a condo building with shared walls and close quarters so, you know, it happens. It’s not unusual. We probably have about 1-3 complaints per month, more probably in the winter because people go out less. We realize though that, for the most part, people are respectful. So if we understand that hey sometimes people have other people over and it gets a little noisy that it doesn’t need to be this big thing. So we usually simply knock on the door and ask the unit owner to reduce the volume of the noise within a half-hour. We also have a room downstairs that unit owners can rent out for a small use fee, so we also offer them the opportunity to move the party downstairs to this room. Most of the time these methods work, and I think it works because we work so hard to not be anonymous and to offer reasonable options. You know we are a familiar presence and regularly remind owners the rights and responsibilities of shared ownership.

Another board member in a different association discusses a chronic noise violation and unruly behavior case. He offers a similar management rationale.

We had one case a few years back where someone had a treadmill in their bedroom and would use it late at night or very early in the morning. The unit owner below him was constantly complaining and we were constantly tasked with responding to the complaint. It was a case that we really learned from because we got it you know. On the one hand you have someone in their own home who has a busy schedule and wants to exercise at the discretion of his or her personal schedule. On the other hand you have someone who is also in their own home and wants to have peace and quiet. We get it. So what do you do right? Do you continually issue warnings, complaints, fines, and so forth until the situation becomes increasingly untenable or do you make it personal and relatable and
work hard to find a mutually agreeable option. Well, we chose the latter. We had the owners meet one another discuss the matter and work to resolve the issue. Long story short, the owner agreed to move the treadmill into the living room because the sound didn’t carry into the bedroom during those hours.

In both of these accounts, the boards of the homeowners’ associations managed the noise violation and unruly behavior cases in a similar fashion; they knowingly decided to focus on resolution rather than escalation by preferring the social logic of homeownership rather than the economic logic of homeownership as the situation required. By focusing on shared ideological identification (via referencing the rights and responsibilities of shared ownership, offering a community room for parties rather than barring them, or finding a compromise) the board members were able to quell, if not entirely dissipate, the potential for conflict and bring stability to the association by recognizing the individual and communal nature of homeownership. Had they responded by preferring the economic logic of homeownership (as some of my non-ambidextrous associations did on very similar matters) they might have fined, fined, fined or told the unit owner to file a complaint with the local police because we are not legally responsible for such matters. These types of responses would have at the very least escalated the conflict by formalizing it and attaching to it a sense of novelty, challenge, contestation, and scrutiny.

In each of these cases, organizational actors regard the simultaneous presence of multiple institutional logics as a benefit. They recognize the presence and accessibility of both the economic logic of homeownership and the social logic of homeownership and make addressing the concerns of both logics routine. They readily and ably respond to the simultaneous presence of multiple institutional logics. Their responses share several features. First, multiplicity is marked by stillness, or the distinct absence of drama and
noise. Organizational actors recognize the concerns of multiple logics and do not perceive them problematically or approach them with fear or hostility. Second, multiple logics are simultaneously incorporated, considered, and balanced in the decision-making process. Organizational actors make adjustments, improvise, or switch between logics given a specific situation. In some situations they may prefer the economic logic to the social logic or vice versa. Their preference for one or the other logic, however, does not result in the contestation or separation of a logic. The concerns of both logics are embedded in the decision-making process and are addressed in the final resolution. Third, organizational actors in ambidextrous organizations are capable of carrying and invoking multiple institutional logics. Both the economic and social logics of homeownership are accessible to all organizational actors in homeowners’ associations.

Practices

As in non-ambidextrous organizations, the practices and actions of organizational actors in ambidextrous organizations are important to understanding the variability of intra-organizational conflict. Board members in ambidextrous homeowners’ associations perceive the simultaneous presence and accessibility of multiple institutional logics beneficially and purposefully respond by trying to contemporaneously manage multiplicity through maintenance work. They do this by using, or “doing” logics and making adjustments, improvising, and switching between logics in an effort to act ambidextrously. Table 4-3 provides representative examples of organizational actors’ ambidextrous responses to institutional pluralism and complexity.
Table 4-3: Representative Examples of Organizational Actors' Ambidextrous Responses to Institutional Pluralism and Complexity

<table>
<thead>
<tr>
<th>Ambidexterity</th>
<th>“Doing” Logics</th>
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<tr>
<td>Adjustment</td>
<td>Improvisation</td>
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<td>Accommodating logics: ( \text{It's not necessarily natural for me to think about personal relationships in economic decisions, but I've learned by working in this setting that I need to work with the other members of the board. I think that's gotten easier and now our association reflects that.} )</td>
<td>Expansion of logics: ( \text{We were just kind of figuring it out after the transition from the developer. We knew they were only about a profit. We knew that wasn't enough. We went to classes and we learned better ways of building economic value and building personal value.} )</td>
</tr>
<tr>
<td>Accommodating logics: ( \text{We have to work with our manager. We've adjusted to one another. I know how he is thinking and I think that he knows how I am thinking. Now I can think for the both of us but I don't!} )</td>
<td>Expansion of logics: ( \text{We were like days away from a hostile takeover and maybe a lawsuit. It took that. It really took that for me to realize we had to change what we were doing. We couldn't be ignorant any longer.} )</td>
</tr>
<tr>
<td>Accommodating logics: ( \text{More than anything else I think that we are tolerant to the dual needs of the association. It's not always easy but well in a way it is. It's like a compromise. And that process has become easier. We bounce off of one another and somehow find a balance for all that we need to do and be.} )</td>
<td>Expansion of logics: ( \text{I hate to say this, and this is confidential right? I used to just hire my buddies for contract work here. That changed though because another board member challenged me. It really changed the culture of the board. But in a good way. We had to move quick and I learned. I learned to do my job in a new way.} )</td>
</tr>
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Organizational actors in ambidextrous organizations perceive the simultaneous presence and accessibility of multiple institutional logics always, continuously, and continually. The concerns of multiplicity are perpetual and omnipresent. Although conflict can and occasionally does occur, it is often anticipated and expeditiously resolved via learned collective practices. The resolution happens through the practice of organizational members who engage in context-specific and thoughtful actions which instantiate, reproduce, and modify their shared understandings and practices of multiple institutional logics. The leadership mantra and decision-making strategies of one homeowners' association illustrates the simultaneous and continual employment of the economic and social logics of homeownership. A board member of this homeowners' association explains:

There is a difference between living in a community and being a part of that community. Being part of a community means sharing with your neighbors and cultivating a common desire and interest. We find this goal is best achieved through communication, consensus, and community involvement. So that is the way we think through our decisions. I mean an HOA is really equal parts business, government, and community. So we try to be mindful of each of these parts as best we can in each of our decisions.

I asked him to elaborate upon how this works in practice. He explained how the board recently decided to renovate the lobby of the clubhouse.

We [the board] started discussing potentially renovating the clubhouse about two months ago. It has started to look tired and it doesn’t show well. There is a new townhome development a couple of miles away that is bright and shiny. We feel like it might be dragging down our value a little bit so we want to be proactive and competitive by making a few improvements now. We [the board] were all in agreement, we had enough money in the reserves to do it, and because legally it is classified as a repair we have the authority to just do it. But because we know this is a community we decided to hold a town hall meeting where we could openly discuss the potential project and properly explain why it was needed before starting the renovation. It was a thoughtful decision on our part because we know
that people don’t like to be surprised. They [other unit owners] felt like they had a part in the decision and that matters when you are neighbors with the people you are making decisions for. You have to bring change in the right way because at the end of the day you still live together.

The direct representation and prudent incorporation of both the economic logic of homeownership and the social logic of homeownership is evident. The board’s invocation of the social logic of homeownership in making the decision to renovate the clubhouse was, in part, a practiced, strategic, and careful maneuver designed to balance their original invocation of the economic logic of homeownership.

No homeowners’ associations in my analysis were completely without conflict. Ambidextrous homeowners’ associations were less conflicted in part because of their apt responses to disagreements and conflicts between institutional logics. Their responses exhibited a tacit “know-how” and practiced invocation of institutional logics. The following board member describes how her association responded to community unrest regarding the board’s decision to fire a long-employed staff member:

Our maintenance worker had worked in the building since the early 1990s. He had a great working knowledge of the building for a great many years; however, after we completed a large-scale renovation of the property he no longer had the proper knowledge to service the building. We instructed him to seek out more education. He didn’t. We let several incidents go with just warnings. Recently though he put us in a very dangerous situation and we had to fire him. Within hours there was gossip circulating around the building about his firing. We knew that we had to respond and communicate why he was fired in the right way so we decided to host an informational meeting.

The board’s employment of the economic logic of homeownership resulted in the, seemingly rightful, decision to fire a long-serving, well-known, and beloved employee; however, the board anticipated that appeals to this logic in the informational meeting would be met with resistance because of the personal relationships many of the unit
owners had developed with the former employee. So while there was certainly a sound rationale and justification for the firing, the board just knew that the real purpose of the informational meeting was not to explain why the maintenance worker was fired, but instead to reassure people that Mike would be OK. So prior to the informational meeting the board called their management company and asked that Mike be considered for maintenance positions in other buildings that they managed. I attended the informational meeting and was somewhat surprised to discover just how astute their analysis was; the meeting began with very angry accusations about mismanagement and a failure to understand the importance of trust and ended with unit owners thanking the board for their prompt and judicious response. The specific reasons for why Mike was fired (i.e., his unwillingness to pursue more education and his mismanagement of equipment in the boiler room) were never discussed.

In both of these examples, and as may be typical in ambidextrous homeowners’ associations, there was an anticipation on the part of one or more organizational actors to thoughtfully respond to multiple, and potentially opposing, ways of thinking and doing. Their anticipation led them to take steps to ensure the compatibility of practical understandings of proper courses of thought and action. In the first example, the board member explained how his board balanced the concerns of the economic and social logics of homeownership in their decision to hold a town hall meeting about the possible renovation of the clubhouse. The second example similarly shows how board members took steps to proactively enact both the economic and social logics of homeownership in their management of a staff change. Both purposefully respond to the simultaneous
presence and accessibility of multiple institutional logics by maintaining both the economic logic of homeownership and the social logic of homeownership. In each case organizational actors enact practices to ambidextrously respond to multiple institutional logics.

One of the ways in which organizational actors enact practices to act ambidextrously is to engage in institutional work—particularly maintenance work. My analysis reveals that organizational actors in ambidextrous homeowners' associations are far more likely to engage in the institutional maintenance of multiple institutional logics when compared to organizational actors in non-ambidextrous homeowners' associations. Board members in ambidextrous homeowners' associations often engage in institutional maintenance to preserve and reproduce the norms and beliefs of both the economic logic of homeownership and the social logic of homeownership.

As shown in previous sections, organizational actors do maintenance work by consciously and thoughtfully expressing and upholding the value of understanding other ways of doing and perpetuating norms and beliefs of both logics in their actions, interactions, and practices. In some cases it was different organizational actors each maintaining and using a different logic (e.g., a board member maintaining the social logic of homeownership and the manager maintaining the economic logic of homeownership or one board member maintaining the social logic of homeownership and a different board member maintaining the economic logic of homeownership) or, more commonly in my data, single organizational actors each maintaining and using multiple logics (e.g.,
one or multiple board members, managers, unit owners, etc. maintaining both the economic logic of homeownership and the social logic of homeownership).

In my analysis, I often found evidence of maintenance work, where organizational actors routinely expressed an implicit understanding of the need to incorporate, uphold, and balance multiple ways of thinking and doing in the decision-making process. The following interview excerpts represent some of many examples of maintenance work in these homeowners' associations:

Any time we make an important decision we do a checks and balances procedure and we ask two questions. Is this good us and is this good for others? We have to answer yes to both of those questions or else it is back to the drawing board.

When you become an owner in a homeowners' association, you give up certain things and you gain certain things. You lose direct control of certain aspects of homeownership, but you gain relationships. When you are on the board you have the power to make decisions, so you get the control back, but now there is the greater potential to lose relationships. If you are losing relationships then what you are doing is wrong.

Good governance is not making decisions based on your own interests. You know you aren’t doing that if sometimes you aren’t happy with the decision but you make it anyway.

Each of these excerpts insinuate a nuanced understanding that one must consider multiple ways of thinking and doing in the decision-making process. The interviewees maintain the values of both the economic logic of homeownership and the social logic of homeownership by acknowledging the individual and communal impacts of their decisions and the cultural embeddedness of their authority. This bleeds in to their actions and practices as is illustrated in the following example of the proceedings of a newly transitioned condominium unit owners meeting.
Board president: Welcome to the first meeting of Sutton Avenue Condominium Association. We are here to celebrate our transition from being a developer-run association to a unit-owner run association. With that in mind, I am happy to answer any questions unit-owners might have about the transition, your homes, or the association.

Unit owner: I am planning to screen in my porch and was wondering if you could recommend a contractor who is reputable and would do it for a reasonable price.

This unit owner clearly does not understand that he cannot screen in his porch without permission from the board.

Board president: Well, I’m sorry to tell you that you actually cannot enclose your porch without express and written permission from the board. With these documents that are a bit vague regarding porches, I could see how you might believe that you could, but, if you look at the bylaws, it specifically says that any alterations to the unit, common element, or limited common element which your porch would be needs approval from the board. But since he here let just check with our legal counsel, Chuck Zito, to make sure that I am interpreting these documents correctly. [He directs the question to the legal counsel present who indeed confirms that unit owners may not enclose their porches without permission from the board.]

Unit owner: OK. I just wanted to check.

There were many other questions similar to this one asked over the course of the two-hour meeting, and the newly minted board members all took turns fielding them, helping one another when they were stumped, and directing questions to the legal and insurance representatives present when necessary. One of the reoccurring questions raised by unit owners at this meeting was the reckless driving of one of the unit owners. The board clearly knew who the offender was, but rather than embarrass him publicly, they chose to make their comments generally and appealed to his sense of community: “a lot of us have the need for speed, but God forbid that need would hurt one of our neighbors, by golly, then there would be a real need for speed!” The board patterned, thoughtful, and
seemingly practiced responses, served two purposes. First, they maintained the economic logic of homeownership by placing an emphasis on the use of professionals and the importance of rule following and adherence to authority. Second, they also maintained the social logic of homeownership by appealing to a larger sense of community and the importance of board practices to service congenial relations. The board members drew upon their natural instincts, the context, and their culturally embedded understandings of the meaning of homeownership in a homeowners’ association to invoke, maintain, and uphold the norms and beliefs of the both logics, either by making adjustments to the logics, improvising, or switching between logics, given the question, concern, or decision they were responding to.

“Doing Logics” to Lessen Conflicts

My analysis reveals that all homeowners’ associations are subject to institutional pluralism and complexity but that responses to institutional pluralism and complexity vary. I propose that it is not the mere presence of multiple and functionally contradictory institutional logics that causes intra-organizational conflict as the institutional logics often implicitly presumes, but rather organizational responses to institutional pluralism and complexity, in particular those responses that stem from the agency of organizational actors. I argue that organizational actors’ responses to institutional pluralism and complexity, as evidenced in their perceptions and practices, better explains the presence of and variability in intra-organizational conflict that homeowners’ associations experience than traditional structural and cultural explanations. Organizational actors’ beliefs about the simultaneous presence and accessibility of multiple institutional logics
and use, enactment, and practice of logics in day-to-day decisions, interactions, and routine activities create the potential for both more and less intra-organizational conflict.\textsuperscript{119} As I have shown, homeowners' associations that respond to institutional pluralism and complexity by eliminating or compartmentalizing logics are more conflicted. Board members in eliminatory and compartmentalizing homeowners' associations (i.e., non-ambidextrous) adhere to a single dominant institutional logic by eliminating new or alternative logics or separating and compartmentalizing multiple logics. This creates a cycle of problem and contestation that ultimately results in an incongruous organizational vision and more intra-organizational conflict. Homeowners' associations that respond to institutional pluralism and complexity ambidextrously, in contrast, are less conflicted. Board members in ambidextrous homeowners' associations make a continuous and thoughtful choice to reify and maintain and use multiple institutional logics. This enables them to use their logics as a cultural and practical toolkit and act ambidextrously. They are able to simultaneously do logics, or to perform complex, continuing, and context-related actions which inscribe different organizational perceptions and practices within one organizational space. Because of these actions they create a self-reinforcing cycle of ambidextrous action which ultimately results in a congruous organizational vision and less intra-organizational conflict.

\textsuperscript{119} Alternative explanations are available. For example, one such alternative explanation may posit that it is the presence of the economic logic only which leads to more conflict and the presence of the economic and social logics which lead to less conflict as opposed to my argument of ambidextrous/non-ambidextrous responses to the presence of multiple logics. While possible, my research finds consistent evidence of differential outcomes based on organizational actors' relative ability to do logics (i.e., ability to make adjustments, improvise, and switch between logics on a context-specific basis). Ultimately, more research is needed which empirically tests the institutional ambidexterity construct.
Automatic Action: Organizational Responses in Non-Ambidextrous Homeowners’ Associations

Organizational actors in non-ambidextrous homeowners’ associations respond to institutional pluralism and complexity by disrupting the creation and/or maintenance work of new or alternative logics. As I have shown in the previous sections of this chapter they do this by undermining the value of new or alternative logics and instinctively re-establishing the dominance of their logic by eliminating or contesting new or additional institutional logics or by separating and compartmentalizing multiple institutional logics. It appears that this is often an automatic, re-occurring, and self-reinforcing response. Organizational actors perceive the simultaneous presence and accessibility of multiple institutional logics as novel and deem multiplicity as problematic. As such they instinctively disrupt new and alternative logics by contesting them or separating them from the dominant logic. I contend that each time an organizational actor chooses to do this he or she contributes to the development of an incongruous organizational vision and creates more intra-organizational conflict. Each of these flare-ups represents missed opportunities for organizational actors to adapt their and their organization’s responses to the simultaneous presence and accessibility of multiple institutional logics and practice ambidexterity.

Instead of practicing institutional ambidexterity non-ambidextrous organizations treat the “problem” of institutional pluralism and complexity by either adhering to a single institutional logic by eliminating a potentially new or an alternative institutional logic or separating and compartmentalizing multiple institutional logics. The perception
of institutional pluralism and complexity as problematic by organizational participants is apparent in my data and their subsequent actions to eliminate or compartmentalize multiple institutional logics comply with theoretical expectation (Oliver, 1991; Kraatz and Block, 2008; Pache and Santos, 2010; Greenwood et al., 2011). The notion, however, that organizations, and by extension organizational actors, respond "strategically," however, was unfounded in my analysis. In the cases presented in the previous section, one can see how organizational actors in non-ambidextrous homeowners' associations frequently, although not exclusively, respond to institutional pluralism and complexity instinctively and without careful or deliberate thought. They undermine or de-legitimate the economic logic of homeownership or the social logic of homeownership in order to fend off the threat of the unknown in an attempt to maintain the dominance and legitimacy of their preferred institutional logic. They do this because it is what they know and are comfortable with, not because they are aware of or acting in accordance with field-level pressures to comply with a single logic as is suggested by most institutional literature (Greenwood et al., 2011). My analysis reveals that this is often an automatic response and is frequently done without strategic aforethought; organizational actors are simply acting and responding to a new or different way of doing and coping with the resultant conflict as best they know how. They are unwitting participants and often do not see or anticipate incompatible practical understandings or the connections between their beliefs, actions, and practices and episodes of conflict. I thusly conclude that these homeowners' associations are more conflicted because organizational actors' automatic actions and inadvertent responses to institutional pluralism and complexity, in the
absence of concrete change or deliberate reckoning, continually create and re-create the context for more intra-organizational conflict. This may help to explain why some organizations exist in a sustained “uneasy truce” (Reay and Hinings, 2005: 364), or in extended situations of contested institutional pluralism and complexity.

Thoughtful Practice: Organizational Responses in Ambidextrous Homeowners’ Associations

Organizational actors in ambidextrous homeowners’ associations respond to institutional pluralism and complexity by actively and purposefully maintaining and using multiple institutional logics. As I have shown in previous sections of this chapter they do this by simultaneously and continually incorporating the norms, concerns, actions, and practices of both the economic logic of homeownership and the social logic of homeownership into their day-to-day perceptions and practices. By regarding multiplicity as a benefit and making adjustments, improvising, and switching between logics on a context-specific basis they do not regularly prefer a single logic over another, but instead reify the underlying norms and values of both. Organizational actors’ maintenance work legitimizes the present institutional logics and makes them available to organizational actors to use as a situation requires. I contend that this makes the organization and its actors ambidextrous. They are able to use both logics to their organization’s benefit. Organizational actors perform ambidexterity on the ground by drawing upon tacit understandings of context-specific situations and subsequently “doing

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120 Practices associated with ambidexterity may begin at the individual level and ultimately become institutionalized at the organizational level. Because this construct was principally identified through an inductive process I do not empirically test the construct against other potential causes of institutional ambidexterity in individuals or organizations and other contributing factors.
Ambidexterity and “doing logics” is a performed response that is produced and reproduced in the everyday activities of organizational actors. Consequently, and despite existing in a continually institutionally pluralistic and complex environment, these organizations experience less intra-organizational conflict.

According to my analysis, ambidexterity requires a conscious, although largely unarticulated, awareness of institutional pluralism and complexity and to “do” logics one must thoughtfully adjust, improvise, and switch between the economic logic of homeownership and the social logic of homeownership in order to make the appropriate compromises and accommodations the situation requires. To avoid or lessen conflicts, organizational actors must simultaneously satisfy the implicit demands and mitigate the contradictions of multiple logics. Because of the simultaneous nature of ambidexterity, there are often individual carriers of multiple logics. In other words, one individual can, and often does, invoke, enact, or perform the beliefs and actions of multiple logics. This assertion is not unfounded in the literature; in fact it extends a recent finding by McPherson and Saunder (2013). Their ethnographic analysis of a drug court provides evidence of the discretionary use of four types of logics by four different types of organizational actors. They effectively show that in the context of institutional pluralism and complexity local actors can both perform their “home” logics and “hijack” the logics of other organizational actors to get the work of the organization done. My analysis extends this work to show organizational actors can, and do, perform actions at the micro-level which benefit meso-level organizational processes. Organizational actorâ"
ability to "do" logics, or to respond to organizational pluralism and complexity ambidextrously, benefits the everyday functioning of the organization.

McPherson and Saunder's (2013) and this author's findings build upon the view first expressed in the last chapter that institutional logics can function as "flexible bits of culture" (Glynn, 2013: 2) and that organizational actors can, and do, exercise a great deal of agency in their everyday use of logics, both in terms of which logics they adopt and for what purpose. Organizational actors in ambidextrous homeowners' associations respond to the presence and accessibility of multiple institutional logics by "doing" logics. They "do" logics by thoughtfully making adjustments, improvising, and switching between logics on a context-specific basis. Making adjustments, improvising, and switching represent actions embedded with tacit understandings of a situation, undertaken in response to a specific context (Jarzabkowski, Smets, and Bednarek, 2013).

Organizational actors mutually make adjustments, or act in ways both according to and not according to specific logics, to benefit the organization. These adjustments do not require an "overarching coordinating device" but rely on the tolerance of multiple parties to potentially contradictory ways of doing (Jarzabkowski, Matthiesen, and Van de Ven, 2009; Lindblom, 1965). For example, in my analysis board members and managers often need to make mutual adjustments. Board members are generally more in sync with the social logic of homeownership because they reside in the community and thus are more apt to understand the social relational aspect of the organization; in contrast, community managers are generally more in sync with the economic logic of homeownership because they are apt to draw upon their professional understandings of
the business. In practice then, board members must adjust to the economic logic of homeownership while community managers must adjust to the social logic of homeownership. The two thus make compromises and accommodations to mitigate the contradictions of multiple logics so that they make work interdependently and get the work of the organization done.

Organizational actors also improvise, or try to find ways around obstacles, to get the work of the organization done (Smets et al., 2012, Jarzabkowski, Smets, and Bednarek, 2013). In practice I find that this requires experimentation and an expansion of practices and responses, yielding, in time, an expanded practice repertoire (Smets, Morris, and Greenwood, 2012; Smets and Jarzabkowski, 2013). For example, in my analysis some associations recalled going from what I may have classified as non-ambidextrous to ambidextrous by improvising to make concrete changes to their responses to institutional pluralism and complexity. In one case a board member recalled years ago when he “ruled with an iron fist” as a means to make the association financially responsible and accountable (he led the board strictly according to the economic logic of homeownership). He felt that he was “doing his job well” but didn’t get the respect he deserved. He recounted years of overly contentious open board meetings and emails and hostile relations with other non-board member unit owners. He spoke though of a “turning point” when a new board member joined the board and challenged him to rethink his leadership style. He automatically reacted at first by championing the “first responsibility of the board” (i.e., fiscal management) but eventually relented to an acknowledgement of a new way of thinking and doing after a “near hostile takeover.”
prompted him to make concrete changes to his decision-making process. The moment of urgency forced him to respond to institutional pluralism and complexity in a different way by acknowledging both the economic logic of homeownership and the social logic of homeownership. The moment itself required situated improvising (he ended up calling an open meeting to review construction management bids rather than just contracting old buddies) and ultimately led to an expanded practice repertoire whereby he developed new practices that incorporated both logics of homeownership. He shares that he now has a broader and more balanced approach, one with two distinct aims instead of just one. He thusly came to respond to institutional pluralism and complexity ambidextrously and with a new appreciation for the ability of two logics to not only co-exist in an institutional environment but also to benefit the organization.

Organizational actors also have the ability to switch between multiple logics. McPherson and Saunder’s (2013) study shows how individuals mostly adhere to their home logics but can switch or hijack other logics. My analysis also shows the potential for organizational actors to switch between the economic logic of homeownership and the social logic of homeownership. For example, board members in my analysis often conformed to certain facets of each of the logics of homeownership given a particular decision or situation sometimes even within the frame of a single decision. In closed-door matters they might reason in accordance with the economic logic of homeownership (e.g., making the decision to fire a long-serving doorman for cost-saving reasons) but in open-door matters they might switch to reason in accordance with the social logic of homeownership (e.g., making the decision to hire a contract
company of doormen to keep the community safe). Individual actors thus embody different identities are able to participate in multiple [inconsistent] cultural traditions (DiMaggio, 1997: 268 in Jarzabkowski, Smets, and Bednarek, 2013). Although resonant with structural hybridization or compartmentalization (Greenwood et al., 2011; Kraatz and Block, 2008; Meyer and Rowan, 1977), switching is distinct because a single actor or an individual carrier is able to shift between multiple logics by enacting them at different times or in different spaces and given a specific context (Jarzabkowski, Smets, and Bednarek, 2013).

*Doing* logics and acting ambidextrously requires organizational actors to draw from their institutional logics toolkits. Organizational actors in ambidextrous homeowners’ associations create cultural (i.e., make accessible and maintain multiple logics of homeownership) and practical (i.e., develop the capacity to thoughtfully practice ambidexterity by making adjustments, improvising, and switching between logics) toolkits to draw upon given a specific context. Organizational actors in non-ambidextrous homeowners’ associations do not respond to institutional complexity reflexively; they do not create these toolkits and thus suffer disadvantageous consequences more and prolonged conflicts.

**Conclusion**

This chapter used recent micro-theorizing in institutional theory and the concepts of institutional ambidexterity and institutional work to argue that it is not the mere presence of multiple logics in an organizational environment that causes intra-organizational conflict as the institutional logics literature presumes, but organizational
actors use, enactment, and practice of logics on the ground. Organizational responses to institutional pluralism and complexity, in particular those actualized in organizational actors’ day-to-day decisions and routine activities, create the potential for more and less intra-organizational conflict. While both non-ambidextrous and ambidextrous homeowners’ associations are subject to multiple logics, ambidextrous homeowners’ associations actively maintain multiple logics for the benefit of the organization. Organizational actors in ambidextrous homeowners’ associations use the economic and social logics in thoughtful practice: they do logics by making adjustments, improvising, and switching between logics on a context-specific basis. Board members in non-ambidextrous homeowners’ associations instinctively respond to institutional pluralism and complexity by adhering to a single institutional logic or compartmentalize multiple logics and, as a consequence, have a greater potential to experience more intra-organizational conflict.
CHAPTER FIVE: CONCLUSION

Introduction

In this dissertation, I have examined and explained the existence, sources, and variability of intra-organizational conflict in a hybrid organization. I have assessed the usefulness of structural and cultural explanations of intra-organizational conflict and ultimately developed and advanced an alternative explanation for the presence of and variability in intra-organizational conflict in a hybrid organization. Homeowners' associations were used as a case for understanding the development of multiple institutional logics and the relationship between institutional pluralism and complexity and the presence of and variability in intra-organizational conflict in a hybrid organization. In particular, I examined how the American history and ideology of homeownership influenced the production of multiple, permanent, and functionally contradictory institutional logics in homeowners' associations and how their existence enabled and constrained individual action at the organizational level. Using institutional theory and the concepts of institutional work and institutional ambidexterity I argued that organizational and organizational actor responses to institutional pluralism and complexity, as evidenced in their perceptions and practices, and use or disuse of multiple institutional logics determined whether a hybrid organization was subject to more or less intra-organizational conflict. This study was based on quantitative and qualitative research conducted on homeowners' associations in the Greater-Boston area. It drew upon approximately 250 original surveys and 56 in-depth interviews with board members of homeowners' associations in addition to observations of homeowners' associations
and textual analysis of homeowners' association documents. In my analysis I sought to address three principal questions: 1) How common is intra-organizational conflict in homeowners' associations; 2) What are the sources of intra-organizational conflict in homeowners' associations; and 3) What makes some homeowners' associations more and less conflicted?

In this chapter I will do the following. First, I will review the major findings of my dissertation. These findings correspond directly to the three principal questions of my dissertation. Second, I will enumerate the original theoretical contributions of my dissertation and explore how my research extends and deepens theory and scholarship on intra-organizational conflict, hybrid organizations, institutional logics, institutional pluralism and complexity, and homeownership. Third, I will address the political and legislative implications of my findings for homeowners' associations and make three recommendations to reduce the potential for conflicts in homeowners' associations. Fourth, I will assess the limitations of my research design and reason how and why this may have affected the generalizability of my findings. Fifth, I will offer suggestions for future research in the area of hybrid organizations and institutional theory. Finally, I will tender my final thoughts about the nature of intra-organizational conflict in homeowners' associations.

**Summary of Findings**

My findings lead to three general conclusions. First, many homeowners' associations experience significant conflict. Nearly half of the homeowners' associations I surveyed reported having experienced at least one significant instance of conflict in the
last 12 months. This finding is largely consistent with theory and literature in the area of organizations and management which point to the relative unavoidability and inevitability of conflict in organizations. Conflict, this scholarship reports, is a natural, relatively inescapable, and, in some cases, necessary component of organizational life. In short, intra-organizational conflict is common in homeowners' associations.

Second, structural and cultural explanations of conflict only partially explain the presence of conflict in homeowners' associations. They do not explain the variability of conflict in homeowners' associations. As I detailed in Chapter Two, "Structure v. Culture: The External and Internal Determinants of Conflict," both the structural and cultural explanations of conflict hold weight. My complete statistical model, which assessed the relative strength of both external and internal and "structural" and "cultural" predictors of intra-organizational conflict, revealed two particularly strong and statistically significant predictors: organization size (an external and structural predictor) and ideological homogeneity (an internal and cultural predictor). I found that homeowners' associations of a large size and homeowners' associations who report sharing a common vision about the purpose of a homeowners' association are less likely to experience a significant instance of conflict when compared to those homeowners' associations of a small size and homeowners' associations who do not report sharing a common vision about the purpose of a homeowners' association. This is all to say that I found some empirical support for both the structural (i.e., the assertion that characteristics of the organization itself best explain the presence of conflict) and the cultural (i.e., the assertion that cultural and material conditions of the organization best explain the
presence of conflict) explanations of conflict. The strongest predictor, however, was
cultural. My measure of the presence of institutional pluralism, ideological homogeneity,
was found to be the most statistically robust predictor of intra-organizational conflict in
homeowners’ associations.

This outcome led me to more fully explore cultural explanations of conflict. For
while my measure of ideological homogeneity may indicate the incongruity of
organizational vision and the possible presence of multiple institutional logics, it did not
directly or fully measure the presence of institutional logics nor did it identify what
institutional logics might be present. Through interviews with board members of
homeowners’ associations and other related organizational actors, in addition to
observations of homeowners’ associations and textual analysis of homeowners’
association documents, I did confirm the correlative association between ideological
homogeneity and the presence of intra-organizational conflict and the presence and
existence of multiple institutional logics. I found two institutional logics culturally
embedded in the hybrid organizational and institutional environment of homeowners’
associations: the economic logic of homeownership and the social logic of
homeownership. As I explained in Chapter Three, “Identifying, Explaining, and Defining
the Logics of Homeownership,” I believe that these logics stem from the American
history and ideology of homeownership and serve to prime organizational actors about
the purpose of homeownership and the homeowners’ association. The economic logic of
homeownership primarily corresponds to the market and financial interests of
homeownership and the homeowners’ association. This logic focuses organizational
actor's attention largely on financial performance indicators, such as property values and the investment potential, and prompts organizational actors to act in their personal and individual best interests. The social logic of homeownership primarily corresponds to the civil and communal interests of homeownership and the homeowners' association. This logic focuses organizational actor's attention largely on public performance indicators, such as shared values and democratic participation, and prompts organizational actors to act in the community's best interests. Because these two logics of homeownership exist in opposition to one another, they create ideological heterogeneity, incongruous organizational visions, and prescribe different goals and modes of action, and, as my survey data strongly suggests, have the potential to cause significant intra-organizational conflict.

Third, and most significantly, the micro-actions of organizational actors matter in situations of institutional pluralism and complexity. While the dual presence of the economic logic of homeownership and the social logic of homeownership may, at least partially, explain the presence of intra-organizational conflict in homeowners' associations, it does not explain the variability in intra-organizational conflict that homeowners' associations experience. Neither the structural nor the cultural explanations of conflict explain why some homeowners' associations are more and less conflicted than others. I argue that the structural and cultural explanations of conflict cannot fully explain the variability of intra-organizational conflict in homeowners' associations because they completely or almost completely ignore the role of organizational actors and their agentic potential to both cause more and less conflict. Indeed, as I explained in Chapter Two and
in the previous section, structural explanations of conflict focus solely on structural attributes of the organization—not on the perceptions and practices of the people within it. The primary concerns if this approach are to categorize and classify conflict rather than to understand the role of organizational participants. The cultural approach moves somewhat closer to addressing the role of organizational participants, but falls short of truly embracing the importance of how organizational actors impact the organization itself. As I detailed in Chapter Three and in the previous section, this approach, while cognizant of embedded agency and applicable to multiple levels of analysis, still mainly focuses on the top-down role that dominant institutional logics play in promoting conformity within fields and organizations rather than on the bottom-up role that organizational actors play in reproducing and transforming organizational structures.

I ultimately offer and develop a third explanation for conflict. My explanation draws from institutional theory and recent scholarship on institutional work and institutional ambidexterity and addresses how individual and institutionalized organizational responses to institutional pluralism and complexity affect the magnitude of intra-organizational conflict in homeowners’ associations. I outlined and provided empirical support for my argument in Chapter Four, “Doing Logics to Lessen Conflicts.” In this chapter, I proposed that organizational actors’ responses to institutional pluralism and complexity explain the variability in intra-organizational conflict, and that it is their relative “not doing” or “doing” of logics that determines whether a homeowners’ association exhibited more or less intra-organizational conflict. Organizational actors who “don’t do” logics respond to institutional pluralism and complexity by eliminating
and compartmentalizing logics. They perceive multiplicity as novel and problematic and enact disruptive practices to contest and separate logics. A non-ambidextrous response results in more intra-organizational conflict. Organizational actors who ō logic respond to institutional pluralism and complexity ambidextrously. They perceive multiplicity as routine, and even beneficial, and enact practices to maintain multiple institutional logics via context-specific and purposeful practices including adjustment, improvisation, and switching. An ambidextrous response results in less intra-organizational conflict.

Theoretical Contributions

My dissertation makes several contributions to the theory and scholarship on intra-organizational conflict, hybrid organizations, institutional logics, institutional pluralism and complexity, and homeownership. First, my research advances scholarship on intra-organizational conflict in significant ways. One of the primary aims of this study was to explore the factors that explain the presence of intra-organizational conflict among homeowners’ associations and homeowners’ association’s governing boards. Understanding what factors predict organizational and board conflict is a step toward choosing policies and institutional arrangements that help reduce dysfunctional conflict or mitigate its negative effects on the organization and the governing board. Although research on the determinants of intra-organizational conflict was bountiful during the 1950s, 1960s, and 1970s, its popularity has slowed, if not stalled, in the past several decades (after the 1970s the focus of research shifted to methods of managing conflict as
opposed to identifying sources of conflict). As a consequence there are few studies which explore factors that explain the presence of conflict in newer types of organizational structures and arrangements. This study, to my knowledge, was the first of its kind to assess the predictive capacity of traditional structural explanations of conflict and newer cultural explanations of conflict in a hybrid organization. In an age when the number of hybrid forms of organization continues to grow and the sectorial lines of demarcation continue to blur this is a significant omission from the literature. The finding that internal and cultural factors, such as ideological homogeneity, may best explain conflict in hybrid organizations moves us forward in understanding how congruous organizational visions impact organizational functioning and performance.

Relatedly, my research considers both the presence and variability of intra-organizational conflict in organizations. Unlike previous explanations of intra-organizational conflict I recognize and attempt to empirically account for experiential differences in intra-organizational conflict. In traditional structural explanations of conflict the primary focus is on the presence or absence of conflict, or, more recently, on the presence of *good/functional* conflict or *bad/dysfunctional* conflict; little thought is given to what conditions engender more and less conflict in organizations. Recent scholarship, for example, has theorized about which conditions create *beneficial* conflict and which conditions create *detrimental* conflict and how those conditions can

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121 Wall and Callister (1995: 517-526) reference Deutsch (1990) in support of their comment that in the past twenty years researchers have not concentrated on finding causes, but instead on classifying and managing its effect on individuals, on relationships, and on communications, behaviors, structure, and issues.
be associated with organizational functioning (Jehn, 1995). Cultural explanations are similarly flat in their analysis of variability in intra-organizational conflict. These explanations tend to implicitly assume that conflict is caused by the presence of multiple institutional logics or the conditions of institutional pluralism and complexity, as such conflict is very rarely concretely defined or empirically measured as much as it is evaluated for treatment or remedy in service of institutional compliance (Pache and Santos, 2010). By advancing a third explanation for intra-organizational conflict that accounts for both the presence of and variability in intra-organizational conflict I hope to offer a more nuanced understanding of conflict and inspire more research into the dynamic nature of conflict and its ability to change form and shape in organizations.

Second, my manuscript extends institutional theory and deepens our understandings of some of its main assumptions and constructs, particularly with respect to scholarship on institutional logics and the concepts of institutional work and institutional ambidexterity. One of the ways that my research adds to scholarship on institutional logics is in my utilization of Glynn’s (2013: 2) reconceptualization of institutional logics as “bits of culture.” Her recognition that a disassociation of institutional logics from institutions sanctions a theorization of logics as flexible bits of culture that constitute actors and shape their actions, informs my analysis. Indeed, as I show in Chapter Three and Four individual organizational actors in homeowners’ associations have the capability to not only simultaneously access multiple institutional logics but also to have them actively shape their perceptions and practices. When organizational actors respond to institutional pluralism and complexity ambidextrously,
for example, they are able to simultaneously access the economic logic of homeownership and the social logic of homeownership and purposefully respond to the concerns of both logics given the specific context. Within moments board members of homeowners’ associations are able to simultaneously enact and embody perceptions and practices consistent with either logic, but never in such a way where the original intent of either logic is eliminated or separated from the other. Envisaging of logics in this way has an affinity to Swidler’s (1986) cultural toolkit approach; I see organizational actors as capable of having a repertoire of logics that they can choose from in their decision-making process. Indeed, my argument, to an extent, hinges on organizational actors’ ability to acquire a cultural and practical toolkit that they can draw from given a specific context. This conceptualization of logics is top-down and bottom-up whereas most traditional conceptualizations of logics are purely top-down.

Another way that my research adds to scholarship on institutional logics is in my distinction between the constructs of institutional pluralism and institutional complexity. In a large body of literature the constructs of institutional pluralism and institutional complexity have been treated as synonymous and interchangeable terms. I differentiate the two constructs based on their influence in the organizational environment. For me, institutional pluralism refers to situations where multiple logics are present, but are not simultaneously accessible or do not exist in direct contradiction with one another and institutional complexity refers to situations where multiple logics are simultaneously present, accessible, and contradictory. My distinction draws from Pache and Santos’s (2010) assertion that intra-organizational dynamics can filter, alter, and inform responses
to institutional pluralism and that institutional logics can be more and less accessible and/or powerful in an organization and in an organizational field. They note that the relative accessibility and power of an institutional logic’s representation in an organization is of particular importance to determining how complex an organizational environment is.  

Although this factor did not become relevant to my analysis—all of the homeowners’ associations included in my study were subject to the conditions of institutional pluralism and complexity (i.e., I found evidence of the simultaneous presence and accessibility of both the economic logic of homeownership and the social logic of homeownership in all of the homeowners’ associations included in my study)—I did allow for the possibility that both were not simultaneously present and/or accessible (i.e., homeowners’ associations could exist in a pluralistic or non-pluralistic and/or complex or non-complex environment) in my analysis.

My bringing together of two hitherto separate concepts is another way that my research adds to or extends scholarship in these areas. The concepts of institutional work and institutional ambidexterity, and their respective scholarship, have developed separately for the most part. I join together these two bodies of literature and incorporate the two concepts to establish my explanation of intra-organizational conflict. I argue that processes associated with the concept of institutional work (e.g., institutional creation, institutional creation, institutional creation, institutional creation, institutional creation, institutional creation, institutional creation, institutional creation,

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122 Besharov and Smith’s (2013) model of organizational hybridity makes a similar claim. They suggest that the degree of complexity in an organization is dependent upon the degree of logic centrality and the degree of logic incompatibility.  

123 As I discussed in Chapter Four, there is an alternative explanation which may posit that it is the presence of the economic logic only which leads to more conflict and the presence of the economic and social logics which lead to less conflict as opposed to my argument of ambidextrous/non-ambidextrous responses to the presence of multiple logics. While possible, my research finds consistent evidence of differential outcomes based on organizational actors’ relative ability to fulfill logics (i.e., ability to make adjustments, improvise, and switch between logics on a context-specific basis).
institutional maintenance, and institutional disruption) can be used in service of individual responses to institutional pluralism and complexity including responses of ambidexterity and elimination or compartmentalization. As I detail in Chapter Four, an ambidextrous response to the simultaneous presence and accessibility of multiple logics depends upon organizational actor’s practice of maintenance of multiple logics. Organizational actors must continually do logics and perform maintenance work; they must actively and consistently ensure adherence to rules and reproduce existing norms and beliefs systems for both the economic logic of homeownership and the social logic of homeownership. In contrast, a non-ambidextrous response to the simultaneous presence and accessibility of multiple logics results from organizational actor’s practice of disruption work. Although organizational actors do engage in the maintenance of their preferred logic, they are more likely than ambidextrous associations to engage in institutional disruption, or to engage in the instinctual practices that undermine the core assumptions and beliefs of any new or alternative logics.

Each of these distinctions contributes in some way to my most significant addition to institutional theory and scholarship on the institutional logics. I add to this literature and research an empirical study that details micro-meso level connections in a hybrid organization. The study of how organizational members act and do the work of the organization in circumstances of permanent institutional pluralism and complexity is remarkably understudied. While there is a rich literature studying how macro-level institutions affect organizational strategies, structures, and practices (Thornton and Ocasio, 1999; Thornton, 2004; Thornton, Ocasio, and Lounsbury, 2012), there are very
few studies which detail how micro-level processes, such as how social actors translate logics into action as they engage in everyday organizational activities, affect meso-level organizational outcomes. This void in the institutional logics literature was recently emphasized in Thornton, Ocasio, and Lounsbury’s (2012) synthesis of the institutional logics perspective. In their discussion about the implications of the institutional logics perspective for future research they state: “It would be very useful to understand how different institutional logics become more or less available and accessible, and become activated in particular situations such as in processes related to decision-making, sense-making, coordination, and problem solving.” In Chapter Four, I do just that. I detail how organizational actors’ responses to institutional pluralism and complexity relate to perceptions about the availability and accessibility of multiple institutional logics and how in homeowners’ associations organizational actors enact practices to simultaneously activate and use either by making adjustments, improvising, or switching or deactivate or disuse by contesting or separating multiple institutional logics.

My third and final contribution relates to the meaning of homeownership. I broaden the meaning of homeownership. The American history and ideology of homeownership frames organizational actors’ understandings of homeownership and provides them with symbolic structures to understand and construct their environments. By extension it imbues homeowners associations with meaning and purpose. The problem that homeowners associations face is that this ideology often frames property

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124 McPherson and Saunder (2013) is an exception. Their ethnographic analysis of a drug court provides evidence of the discretionary use of four types of logics by four different types of organizational actors. They effectively show that in the context of institutional pluralism and complexity local actors can both perform their home logics and hijack the logics of other organizational actors to get the work of the organization done.
and homeownership as a private and singular experience; it does not consider, for the most part, public and communal or shared ownership structures. This study points to the need to broaden our cultural understandings of homeownership, particularly in light of the growing number of communal homeownership structures. My research suggests that there is a need to simultaneously maintain both the economic logic of homeownership and the social logic of homeownership and to purposefully incorporate them into the perceptions and practices of these organizations to lessen the conflicts caused by their private/public and individual/communal nature. As I have shown, ambidextrous responses to the presence of these logics benefit the overall functioning of the organization.

Policy and Legislative Implications

My research also carries significant political and legislative implications. In 2006, the American Association of Retired Persons (AARP), prompted by a study which indicated that approximately 46% and 56% of owners in single-family and condominium homeowners' associations respectively were over the age of 50 and in response to media furor over the alleged misdoing and mismanagement of homeowners' associations, drafted a set of ten principles, or "rights" to address the nature of intra-organizational conflict in homeowners' associations. Their "Bill of Rights for Homeowners in Associations" uses legalese so that state legislatures and homeowners' associations' boards can follow it when developing laws and regulatory procedures for or developing or modifying governing documents of homeowners' associations. The Bill of Rights for Homeowners sets forth the following ten principles:
I. The Right to Security against Foreclosure: An association shall not foreclose against a homeowner except for significant unpaid assessments, and any such foreclosure shall require judicial review to ensure fairness.

II. The Right to Resolve Disputes without Litigation: Homeowners and associations will have available alternative dispute resolution (ADR), although both parties preserve the right to litigate.

III. The Right to Fairness in Litigation: Where there is litigation between an association and a homeowner, and the homeowner prevails, the association shall pay attorney fees to a reasonable level.

IV. The Right to Be Told of All Rules and Charges: Homeowners shall be told of the association’s broad powers, and the association may not exercise any power not clearly disclosed to the homeowner if the power unreasonably interferes with homeownership.

V. The Right to Stability in Rules and Charges: Homeowners shall have rights to vote create, amend, or terminate deed restrictions and other important documents. Where an association’s directors have power to change operating rules, the homeowners shall have notice and an opportunity, by majority vote, to override new rules and charges.

VI. The Right to Individual Autonomy: Homeowners shall not surrender any essential rights of individual autonomy because they live in a common-interest community. Homeowners shall have the right to peaceful advocacy during elections and other votes as well as use of common areas.

VII. The Right to Oversight of Associations and Directors: Homeowners shall have reasonable access to records and meetings, as well as specified abilities to call special meetings, to obtain oversight of elections and other votes, and to recall directors.

VIII. The Right to Vote and Run for Office: Homeowners shall have well-defined voting rights, including secret ballots, and no director shall have a conflict of interest.

IX. The Right to Reasonable Associations and Directors: Associations, their directors and other agents, shall act reasonable in exercising their power over homeowners.

X. The Right to an Ombudsperson for Homeowners: Homeowners shall have fair interpretation of their rights through the state Office of Ombudsperson for Homeowners. The ombudsperson will enable state oversight where needed, and increases available information for all concerned.
The document was picked up by a couple of media organizations and its contents soon spread like wildfire among homeowners' association advocacy groups. While the sample model statute has not resulted in many significant legal changes regarding the status of homeowners' associations and the rights of ownership at the level of state legislature, the implications of its contents have inspired many debates about the supposed problems inherent in homeowners' associations.125

Chief among them are debates about the governance issues caused by the hybrid organizational form of homeowners' associations. The most loudly voiced issue concerns whether homeowners' associations, by design, omission, or default, come to function as "residential private governments" (Dilger, 1992; Barton and Silverman, 1994; McKenzie, 1994; Stabile, 2000; Glasze, Webster, and Frantz, 2005; Staropoli, 2006, 2008). Because these organizations straddle the neat political distinction between public and private life they could become "natural laboratories for testing the impact of shedding public services by local governments" (Dilger, 1992: 86). Proponents of the privatization of public services argue that private firms (such as that of homeowners' associations) can deliver services more effectively than governments and opponents of the privatization of public services argue that privatization would isolate the least privileged members of society who could not afford to meet their needs in the private sector. Dilger (1992), for example, fears those homeowners' associations which are embattled in conflict and which may

125 There are some exceptions. A homeowners' association reform bill goes into effect in July 2014 in Florida which is set to effectively end the run of so called homeowners' association "dictatorships". Another bill, the North Carolina Planned Community Act, went into effect in 2013. This bill sought to change the foreclosure process and change dispute mediation procedures. By and large, however, there have been no sweeping regulations of homeowners' associations.
operate without sufficient accountability and governance structures could come to only represent the interests of middle- to upper-middle-income groups with specific political agendas.\textsuperscript{126}

Other related areas of concern include the impetus embedded in the governance structure and related governance documents. Boudreaux and Holcombe (2009) contend that homeowners' associations do not work well as private governments because the pursuit of self-interest is built in to its organizational structure and its governing documents. They suggest that the origination of homeowners' associations as organizations for developers to maximize their investment does not bode well for a collaborative and communal living environment. In other words, because the developer has an incentive to set up a governance structure that is meant to maximize profits, they craft organizational documents and procedures meant to net the highest income, not to protect the best interests of the community.

Finally, another concern is the limited role for non-board member homeowners in the decision-making process due to homeowners' associations' hybrid organizational form. The sheer number of complaints regarding the election process and the power of the board are a testament to the domination of homeowners' associations' corporate-like interests. These interests are written into the laws of homeowners' associations and

\textsuperscript{126} Social stratification scholars have, for some time, denoted processes of social closure that exclude or limit the access of subordinate groups to valued resources and institutions. Housing represents one such arena within which processes of closure may play out—a fact denoted by the substantial literature on racial residential segregation and its persistence (see: Massey & Denton, 1993; Charles, 2003; and Karafin, Tester, and Roscigno, 2005). Homeowners' associations exacerbate existing inequalities by creating a legal framework for private land and property use controls, particularly for formally public services now provided privately by homeowners' associations. For example, homeowners' associations are tasked with maintaining common areas and land, providing security, and collecting trash.
unless either statutory law or the homeowners’ association’s governing documents reserve a particular issue or action for approval by a quorum of non-board member unit owners all power is exercised by the board of directors.

My research has the potential to impact our understandings of each of these issues and concerns, and to, ultimately, aid in the development of programs, policies, and laws to protect the private and public interests of homeowners’ associations to prevent the production of headlines like those that prefaced this dissertation. By acknowledging the private and public nature of homeowners’ associations, industry professionals, government officials, public agencies, and homeowners can better balance the individual and communal facets and the economic and social interests of homeowners’ associations. Towards that end, I make three public policy and legislative recommendations. First, require homeowners’ associations to register with state agencies. Homeowners’ associations represent a relatively new organizational form. Over 73% were incorporated in the last 20 years and more than half were incorporated in the last 10 years. In some states the legislative process has kept apace, but in many it has not and the laws vary widely. Only three states (Florida, Utah, and Colorado) currently require homeowners’ associations to register with the state, and even fewer require homeowners’ associations to submit an annual report.127 Second, require homeowners’ association board members and industry professionals to attend educational seminars on the unique concerns and interests of this type of organization. Most volunteers who serve on

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127 Florida’s homeowners’ associations are required to register with the Florida Department of Business and Professional Regulation. Utah’s homeowners’ associations are required to register with the Utah Department of Commerce. Colorado’s homeowners’ associations are required to register with the Colorado Division of Real Estate.
Homeowners' association boards lack the time and/or expertise to properly govern the association. Further, most states do not require professional managers and management companies to be licensed.\textsuperscript{128} Third, require realtors and other real estate professionals to educate people about homeowners' associations prior to purchasing a unit in a homeowners' association. Homebuyers are rarely sufficiently educated about the role homeowners' associations will play in their home purchase. The average homebuyer does not review governing documents before making an offer on a home and is not fully aware of the power homeowners' association boards can wield. Conflicts would be substantially reduced if homeowners were aware of the roles and responsibilities of the board and the homeowners' association at the outset.

Limitations of Research Design

My research design had two principal limitations that could potentially impact the generalizability of my findings. The first limitation was my sample. My sample was limited in three respects. First, I only surveyed and interviewed homeowners' association board members in Greater-Boston Massachusetts (Essex, Middlesex, Norfolk, Plymouth, and Suffolk counties). Although Greater-Boston area homeowners' associations are representative of homeowners' associations in other states and regions, I cannot claim full generalizability. The state of Massachusetts does not require homeowners' associations to register with any state agency and there are few laws which regulate the activities of homeowners' associations. For comparative reasons it would have been useful to survey and interview homeowners' association board members in states like

\textsuperscript{128} Fewer than 10 states require managers and management companies to be licensed.
Florida, Utah, or Colorado where there are state registries of homeowners’ associations and/or laws regulating their activities.

Relatedly, there could be place and neighborhood influences that were not captured in my research design. Recent sociological literature expounds on the premise that both individual and contextual characteristics can have an effect on a wide range of social and behavioral outcomes (e.g., educational attainment, crime and delinquency, labor force participation, voluntary association participation, etc.).\textsuperscript{129} These so-called “neighborhood effects” generally refer to the study of how local context influences the perceptions and practices of individuals in a way that cannot be reduced to the properties of the individuals themselves.

Second, my sampling frame was incomplete. Because there is no state law which requires registry of homeowners’ associations in Massachusetts I did not have access to a complete sampling frame. For all intents and purposes homeowners’ associations operate as “invisible” organizations in the state of Massachusetts. The 2011-2012 board membership directory of the New England Chapter of the Community Associations Institute (CAI-NE) provided the sampling frame for this study. I recognize that use of such a sampling frame creates systematic bias; there are substantive differences between those homeowners’ associations who voluntarily choose to register with the Community Associations Institute and those homeowners’ associations who do not choose to register.

\textsuperscript{129} See Gephart, 1997; Leventhal and Brooks-Gunn, 2000; Sampson, Morenoff, and Gannon-Rowley, 2002 for recent reviews of the research on neighborhood effects.
with the Community Associations Institute or who do not know about the opportunity to register with the Community Associations Institute.\footnote{For example, larger-size homeowners' associations may be more likely to register with an organization like the Community Associations Institute (CAI). This may have created a bias in my sample whereby I missed recording and analyzing the experience of very small homeowners' associations. My interview data did include 12 interviews with homeowners' associations of 10 units or less and 5 interviews with homeowners' associations consisting of 5 units or less, but I do not know how representative this is of homeowners' associations in the Greater Boston-area.}

Third, I only formally surveyed and interviewed homeowners' association board members. I did not formally survey and interview other organizational actors in this space (e.g., non-board member unit owners, managers, and other service providers). Although I did informally interview and observe non-board member homeowners, managers, and other service providers I cannot make any generalizable claims about their role in the organization and their role regarding the presence and magnitude of intra-organizational conflict in homeowners' associations.

The second limitation was the precision of my measurement. First, my measurement of intra-organizational conflict in my original Homeowners' Association Survey could have been more precise. As I detailed in Chapter Two, I measured the presence of conflict using responses to a single survey question. Although this measure was valid and reliable, and consistent with the measurement of intra-organizational in other studies, I believe that a more precise measure is preferable for future studies of intra-organizational conflict. In future studies I would recommend using an index of questions or responses to multiple survey questions to measure the presence/absence of intra-organizational conflict; for example first asking respondents about the percentage of decisions made by the board which were characterized by full agreement and then by
asking respondents their level of agreement about how well the board worked together. I believe that these two questions would more precisely measure the presence and variance of conflict in organizations.

Second, my measurement of the institutional ambidexterity construct is necessarily limited. Because this construct was principally identified through an inductive process I do not empirically test the construct against other potential causes of institutional ambidexterity or other contributing factors. There may be additional potential causes of ambidexterity that are not addressed in my research design such as those related to context (e.g., neighborhood effects) or individual and group characteristics (e.g., professional skills, generational binders, etc.).

**Future Research**

Although this study was concerned with the case of homeowners’ associations, it may be broadly applicable and generalizable to other hybrid organizations. The legal, economic, and organizational form and status of homeowners’ associations is unique, but it is not altogether abnormal. It would be useful to explore the nature of intra-organizational conflict in other types of hybrid organizations, such as charter schools, hospitals, social enterprise organizations, public management organizations, and other organizations that exist at the intersections of multiple fields, or which merge the public and the private and behave in ways inconsistent with just one sector of society.

Of particular interest would be more studies of the micro-processes of organizational actors in hybrid organizations, particularly those organizations that exist in different types and/or levels of institutional pluralism and complexity. There are still too
many presumptions made in institutional theory regarding the top-down influence of institutional logics. More research needs to be done to assess how organizational actors interface with multiple institutional logics, their perceptions about multiplicity, and the practices they use to reconcile any institutional contradictions that may exist.

**Final Thoughts**

The headlines and media reports that opened this dissertation, although perhaps extreme and sensationalized, are not anomalies. Real conflict exists in homeowners’ associations, and at least some of the variability of intra-organizational conflict in homeowners’ associations is due to organizational actors’ responses to the simultaneous presence of multiple and functionally contradictory institutional logics. Homeowners' associations have the potential to be organizations that can merge the private and the public and can use the conditions of institutional pluralism and complexity to its advantage. There are perhaps thousands of associations where people act ambidextrously to the economic and social benefit of the association. It’s the associations that are stewed in conflict, however, that tend to steal the media spotlight. It is my hope that in the future this will change that we will hear more and learn more about those homeowners' associations and other hybrid organizations that have organizational actors who accommodate the institutional imperative of multiple logics and who act ambidextrously by doing logics.
APPENDIX A: BOARD MEMBER QUESTIONNAIRE

Homeowners’ Association Board Member Survey

The Homeowners’ Association Board Member Survey is designed to collect descriptive information about your homeowners’ association community. It represents an opportunity for you to reflect on your experiences serving on the board of your homeowners’ association and to assess and plan for the future of your board and community. Your willingness to complete the survey will help researchers, homeowners, and the general public better understand the role of homeowners’ associations in social life. Please answer each question clearly and to the best of your ability. Thank you for your participation.

Community Characteristics

1. Which county of Massachusetts is your association located in?
   - [ ] Essex
   - [ ] Middlesex
   - [ ] Norfolk
   - [ ] Plymouth
   - [ ] Suffolk
   - [ ] Other (please specify ____________________________)

2. Which of the following best represents the type of housing you are currently living in?
   - [ ] Single-family home
   - [ ] Condominium
   - [ ] Townhouse
   - [ ] Apartment (cooperative)
   - [ ] Other (please specify ____________________________)
3. What is the approximate age of your association?

- 0 – 10 years
- 11 – 20 years
- 21 – 30 years
- 31 – 40 years
- 41 – 50 years
- 51 years or more
- Unsure/I don’t know

4. What is the approximate size (total number of housing units) of your association?

- 1 – 50 units
- 51 – 100 units
- 101 – 150 units
- 151 – 200 units
- 201 – 250 units
- 251 – 300 units
- 301 units or more

5. In your estimation, what percentage of the total population of residents in your association is composed of renters?

- 0% – 25%
- 26% – 50%
- 51% – 75%
- 76% – 100%

6. In your estimation, what is the average length of homeownership in your association?

- Less than 5 years
- 5 – 10 years
- 15 – 20 years
- 21 years or more
7. In your estimation, what is the average annual income of residents in your association?

☐ Less than $50,000
☐ $50,000 - $99,999
☐ $100,000 - $149,999
☐ $150,000 - $199,999
☐ $200,000 - $249,999
☐ $250,000 or more
☐ Unsure/I don't know
☐ I prefer not to respond

8. Which statement best describes the social makeup (i.e. composition) of your community?

☐ The social makeup of my community is mostly homogeneous (similar/not very diverse)
☐ The social makeup of my community is mostly heterogeneous (dissimilar/very diverse)

9. Does your association employ a community manager or management company?

☐ No
☐ Yes

Board Characteristics

10. Approximately how many members serve on the board of your homeowners' association?

☐ 1 – 3 members
☐ 4 – 6 members
☐ 7 – 9 members
☐ 10 members or more
11. How long has the average board member served on the board?

- [ ] Less than 3 years
- [ ] 3 – 5 years
- [ ] 6 – 8 years
- [ ] 9 years or more

12. Does your community elect its board members?

- [ ] Yes
- [ ] No (please skip to Question #15)

13. In your estimation, what is the average unit owner response rate to board member elections?

- [ ] 0% – 25%
- [ ] 26% – 50%
- [ ] 51% – 75%
- [ ] 76% – 100%

14. Do your elections regularly meet quorum requirements?

- [ ] Yes
- [ ] No

15. How often does your board meet?

- [ ] Less than once a year
- [ ] 1 – 8 times a year
- [ ] 9 – 12 times a year
- [ ] 13 times or more a year

16. What types of decisions does your board typically make?

- [ ] Financial only (budget, assessments, contracts, etc.)
- [ ] Social only (community rules, social committees, social events, etc.)
- [ ] Both financial and social
17. How frequently do the association's legal documents (Bylaws, CC&Rs, and Rules & Regulations) guide the decision-making of the board?

☐ Very frequently
☐ Frequently
☐ Infrequently
☐ Very infrequently

18. Do board members regularly express a common vision about the purpose of the homeowners' association during the decision-making process?

☐ No
☐ Yes

19. Does the board regularly share board minutes and budgetary information with the community?

☐ No
☐ Yes

20. Are you currently serving on the board of your homeowners' association?

☐ No
☐ Yes

Financial Characteristics

21. In your estimation, what is the average community association fee assessed per month?

☐ Less than $100
☐ $100 - $199
☐ $200 - $299
☐ $300 - $399
☐ $400 - $499
☐ $500 or more
22. In your opinion, how frequently does your community charge special assessments?

☐ Very frequently
☐ Frequently
☐ Infrequently
☐ Very infrequently

23. In your opinion, does your reserve fund contain sufficient resources to pay for routine association maintenance?

☐ No
☐ Yes

Social Characteristics

24. Did your board and/or homeowners’ association experience at least one significant (especially important, meaningful, memorable, or notable) instance of conflict (i.e., incompatibility, disagreement, or dissonance) in the last 12 months?

☐ No
☐ Yes

25. How many times has the board experienced a significant (especially important, meaningful, memorable, or notable) instance of disagreement regarding the proper course of action for your association in the last 12 months?

☐ Never
☐ 1 – 2 times
☐ 3 – 4 times
☐ 5 – 6 times
☐ 7 times or more

26. How many times has the board issued a written notice of noncompliance to any other board or community members in the past 12 months?

☐ Never
☐ 1 – 2 times
☐ 3 – 4 times
☐ 5 – 6 times
☐ 7 times or more
27. How many times has the board levied a monetary fine on any board or community member in the past 12 months?

☐ Never
☐ 1–2 times
☐ 3–4 times
☐ 5–6 times
☐ 7 times or more

28. How many times has the board put a lien on or foreclosed upon another board or community member’s home in the past 12 months?

☐ Never
☐ 1–2 times
☐ 3–4 times
☐ 5–6 times
☐ 7 times or more

29. How many times has the board/association been threatened with or involved in a legal dispute in the last five years?

☐ Never
☐ 1–2 times
☐ 3–4 times
☐ 5–6 times
☐ 7 times or more

30. Is the board currently involved in a legal dispute?

☐ No
☐ Yes
APPENDIX B: BOARD MEMBER INTERVIEW SCHEDULE

Homeowners’ Association Board Member Interview Schedule Coversheet

ID #__________

1. General Description of Association
   □ Complete
   □ Incomplete

2. Purpose of Homeowners’ Associations
   □ Complete
   □ Incomplete

3. Personal Experiences Serving on the Board
   □ Complete
   □ Incomplete

4. Responsibilities of the Board
   □ Complete
   □ Incomplete

5. The Board’s Financial Decisions
   □ Complete
   □ Incomplete

6. The Board’s Social Decisions
   □ Complete
   □ Incomplete

7. Rules, Regulations, and Governance Documents
   □ Complete
   □ Incomplete

8. Legal Matters
   □ Complete
   □ Incomplete
9. Board Members and the Community
   □ Complete
   □ Incomplete

10. The Board and the Manager or Management Company
    □ Complete
    □ Incomplete

11. Concluding Thoughts
    □ Complete
    □ Incomplete

12. Available for follow-up?
    □ No
    □ Yes

**Homeowners’ Association Board Member Interview Schedule**

The Homeowners’ Association Research Project is designed to collect descriptive information on homeowners’ association boards and communities. It represents an opportunity for board members and community members to reflect on their experiences serving on the board and/or living in a homeowners’ association community. Your willingness to participate in this interview will help researchers, homeowners, and the general public better understand the role of homeowners’ associations in social life. Thank you for your participation.

□ Review rights of voluntary participation

□ Consent to audio record interview

**A. Demographic Information**

1. Interviewee sex:
   □ Male
   □ Female

2. Interviewee age:
   □ _________
3. Interviewee race/ethnicity:

- Non-Hispanic White
- African American
- Hispanic
- Asian/Pacific Islander
- Other/Mixed

4. Interviewee household:

- One (him/herself)
- Two
- Three or more

5. Interviewee currently serving on the board of his/her homeowners' association?

- No, number of years served on the board _____________________________
- Yes

6. Name of association: ________________________________________________

7. Categorization of association:

- Less conflicted
- More conflicted

8. Name of interviewee: ________________________________________________

B. Purpose of Homeowners’ Associations

Please describe your overall feelings about the purpose of homeowners’ associations.

1. What do you believe is the overall purpose of a homeowners’ association?

2. How did you learn about homeowners’ associations (e.g., from a developer, from a realtor, from your governing documents, from other community members, from the media, from public discourse, etc.)? What did you learn?
3. What do you think are the core responsibilities of homeowners’ associations (e.g., managing finances, enforcing community rules, enhancing property values, maintaining social cohesion, providing services, etc.)? What is its most important responsibility? Why?

4. Do you believe that homeowners’ associations add value to a community? If so, what type of value?

C. Personal Experiences Serving on the Board

Please describe your experiences serving on the board of your homeowners’ association.

5. How would you describe your overall experience serving on the governing board of your association?

6. Why did you decide to volunteer to be a board member of your association? Did a specific event prompt you to decide to volunteer? Did you have a specific agenda or goals you wished to accomplish?

7. Do you have a defined position on the board? What are your defined responsibilities? Are there other undefined responsibilities?

8. Are you currently serving on the board? If yes, do you expect to run for the board again once your term expires? Why or why not? If no, when did you serve on the board? Why are you no longer serving?

D. Responsibilities of the Board

Please describe the short-term and long-term responsibilities of the board.

9. What are the board’s day-to-day, or short-term, responsibilities? What are the board’s long-term responsibilities?

10. Do all of the members of your board agree on the importance of these responsibilities?
11. In your opinion, how effective is the board in handling these responsibilities? What makes your board ineffective in handling these responsibilities?

12. Can you describe one responsibility about which there is great agreement and one responsibility about which there is great disagreement?

E. The Board’s Financial Decisions

Please describe the financial decision-making process of the board.

13. What financial decisions does your board make (e.g., operating budget, contracts, fees, reserves, etc.)?

14. What guides the board’s financial decision-making process (e.g., professional experiences, personal beliefs, association’s legal documents, etc.)?

15. How often do all of the board members agree about financial decisions? When there is disagreement, what is typically the source of disagreement (e.g., personality conflicts, disagreements about which tasks to perform, disagreements about how to perform tasks, disagreements about role responsibilities, etc.)?

16. Can you describe one financial decision where there was disagreement and how it was resolved?

F. The Board’s Social Decisions

Please describe the social decision-making process of the board.

17. What social decisions does your board make (e.g., defining community rules, issuing sanctions for rule violations, instituting social committees, encouraging community involvement, etc.)?

18. What guides the board’s social decision-making process (e.g., professional experiences, personal beliefs, association’s legal documents, etc.)?
19. How often do all of the board members agree about social decisions? When there is disagreement, what is typically the source of disagreement (e.g., personality conflicts, disagreements about which tasks to perform, disagreements about how to perform tasks, disagreements about role responsibilities, etc.)?

20. Can you describe one social decision where there was disagreement and how it was resolved?

21. What other types of decisions does your board make? What guides these decisions? How often is there disagreement? How is it resolved?

G. Rules, Regulations, and Governance Documents

Please describe the role of community rules, regulations, and governance documents.

22. How knowledgeable are board members about the association’s governance documents (i.e., community rules, regulations, etc.)?

23. How knowledgeable are community members (other homeowners) about the association’s governance documents (i.e., community rules, regulations, etc.)?

24. What issues of non-compliance arise? How many issues of non-compliance are there in a typical year?

25. Can you describe a situation of non-compliance your board dealt with? Did the board apply a sanction (e.g., issue a written or verbal warning, issue a monetary fine, hold hearings, contact a lawyer, etc.)? Why or why not? What was the outcome?

H. Legal Matters

Please describe the legalities of your association.

26. How knowledgeable are board members about the legalities of homeowners’ associations?
27. What legal issues does your board deal with? How many legal issues arise in a typical year?

28. Can you describe a legal issue your board had dealt with?

29. How many times has your board been threatened with or involved in a lawsuit? What was the lawsuit about?

I. Board Members and the Community

Please describe board member interactions with other community members (other homeowners).

30. How often and in what way do board members typically communicate with other homeowners (e.g., in person at meetings, in person around the community, in person at social events, by letter, by email, by phone, via the website)?

31. What types of interactions do board members typically have with other homeowners (e.g., professional, friendly, argumentative, impersonal, etc.)? What are the interactions mostly about?

32. How often are there disagreements between board members and other homeowners? What is typically the source of the disagreement (e.g., personality conflicts, disagreements about which tasks the board should perform, disagreements about how the board should perform tasks, disagreements about role responsibilities, etc.)?

33. Can you describe one disagreement between a board member and a community member and how it was resolved?

34. Do you believe that community members generally believe that the board is acting in their best interests? Why or why not?
J. The Board and the Manager or Management Company

Please describe your board's interactions with your community manager and/or management company.

35. Why did your board decide to hire a manager or management company? What is the value in hiring a community manager or management company? What are the primary responsibilities of the manager or management company?

36. How often does the board communicate with the manager or management company? How do the interactions typically take place (e.g., in person, by letter, by email, by telephone, via the website, etc.)? What are the interactions typically like (e.g., professional, friendly, argumentative, impersonal, etc.)?

37. How often does the board disagree with the manager or management company about key decisions? What is typically the source of the disagreement (e.g., personality conflicts, disagreements about which tasks the board should perform, disagreements about how the board should perform tasks, disagreements about role responsibilities, etc.)?

38. Can you describe one disagreement between the board and the manager or management company and how it was resolved?

K. Concluding Thoughts

39. Based on your experiences as a unit owner and as a board member, what are the advantages and disadvantages of living in a homeowners' association? What is the single best or worst thing about them?

40. Has being a member of a homeowners' association community changed your feelings about the overall purpose and value of homeownership?
### APPENDIX C: BOARD MEMBER INTERVIEWER CHARACTERISTICS

#### Table C-1: Board Member Interviewee Characteristics

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REFERENCES


CURRICULUM VITAE

COURTNEY L. FELDSCHER

Boston University                                           Office Phone (617) 358-0652
Department of Sociology                                     Department Phone (617) 358-0652
96-100 Cummington Street                                   Department Fax (617) 353-4837
Boston, Massachusetts 02215                                Email: cofeld@bu.edu

EDUCATION

2014   Ph.D., Sociology, Boston University

Dissertation: *Home Sweet Home? The Multiple Logics of Homeownership and the Politics of Conflict in a Hybrid Organization*

Committee Members: Emily Barman, Ph.D. (Chair), Alya Guseva, Ph.D., and Japonica Brown-Saracino, Ph.D.

2003   B.A. Sociology, Magna cum Laude, University of Maryland

B.A. Criminology, Magna cum Laude, University of Maryland

AREAS OF INTEREST

Formal Organizations                                        Public Policy
Sociology of Work & Labor                                    Sociology of Culture
Community & Urban Sociology                                  Methods of Research
Sociology of Media & Mass Communications                   Scholarship of Teaching & Learning
PUBLICATIONS

Trade Publications


Reviews


Works in Progress

Feldscher, Courtney L. "Structure v. Culture: External and Internal Determinants of Conflict in a Hybrid Organization."

Feldscher, Courtney L. "Doing Logics to Lessen Conflicts: Institutional Pluralism and Complexity in a Hybrid Organization."

Feldscher, Courtney L. "Home Ownership as Economic Investment: Reflections Pre- and Post-Crisis."

PRESENTATIONS

Invited Presentations


Conference Presentations


Colloquia Presentations


2011  Selling Reading: An Analysis of the Commercialized Scholastic Book Club Flyer. University of Massachusetts Boston Undergraduate Honors Student & Faculty Research Collaboration Presentations ː Boston, Massachusetts (Faculty advisor for Malia Justice).
Conference Participation


2012    The Art at the Heart of Learner-Centered Teaching Pre-Conference Seminar, Section on Teaching & Learning, American Sociological Association (ASA) Annual Conference ÿ Denver, Colorado.

2011    Public and Nonprofit Division (PNP) Doctoral Student Professional Development Consortium, Academy of Management (AoM) Annual Conference ÿ San Antonio, Texas.


FELLOWSHIPS, HONORS AND AWARDS

Teaching, Learning & Service

2013    Excellence in Graduate Teaching Award, Boston University College of Arts & Sciences ÿ Boston, Massachusetts (Sociology of Organizations and Sociology of Popular Culture)

2013    Senior Teaching Fellowship, Boston University Department of Sociology ÿ Boston, Massachusetts (Spring Semester, Sociology of Popular Culture)

2012    SAGE Teaching Innovations & Professional Development Award, American Sociological Association (ASA) Section on Teaching & Learning

2012    Senior Teaching Fellowship, Boston University Department of Sociology ÿ Boston, Massachusetts (Spring Semester, Sociology of Popular Culture and Fall Semester, Sociology of Formal Organizations)

2011    Senior Teaching Fellowship, Boston University Department of Sociology ÿ Boston, Massachusetts (Spring Semester, Film & Society)

2009    Senior Teaching Fellowship, Boston University Department of Sociology ÿ Boston, Massachusetts (Fall Semester, Sociology of the Workplace)
2007–2009 Graduate Writing Fellowship, Boston University College of Arts & Sciences Writing Program – Boston, Massachusetts (Fall & Spring Semesters, *Time, Work, and Life: A Writing & Research Seminar*)

2007 Junior Teaching Fellowship, Boston University Department of Sociology – Boston, Massachusetts (Spring Semester, *Sociology of the Workplace* and Fall Semester, *Sociological Methods*)

2005–2006 Teaching Fellowship, Boston University Department of Sociology – Boston, Massachusetts (Fall & Spring Semesters, *Principles in Sociology*)

2003 College Park Scholars Honors Fellowship (1999-2003), University of Maryland – College Park, Maryland

Research

2012 American Sociological Association (ASA) Student Forum Travel Grant Award, American Sociological Association (ASA) Annual Conference – Denver, Colorado

2011 Byron Hanke Fellowship for Research on Community Associations, Foundation for Community Association Research – Alexandria, Virginia

2011–2012 Morris Dissertation Research Grant, Boston University Department of Sociology – Boston, Massachusetts

2003 Undergraduate Research Award, University of Maryland Department of Sociology – College Park, Maryland.

TEACHING EXPERIENCE

Senior Teaching Fellow, Boston University

*Sociology of Popular Culture (SO253)*
2013/2012 – 2 semesters (50 students)
Duties: Full responsibility for designing and teaching the course

*Sociology of Formal Organizations (SO304)*
2012 – 1 semester (35 students)
Duties: Full responsibility for designing and teaching the course

*Film & Society (SO345)*
2011 – 1 semester (35 students)
2012/2011/2010/2008 – 4 summer sessions (15–20 students per session)
Duties: Full responsibility for designing and teaching the course

_Sociology of the Workplace (SO333)_
- 2010/2007 2 semesters (35 students per semester)
- 2009 1 summer session (15 students)
Duties: Full responsibility for designing and teaching the course

_Independent Study: Honors Practicum_
- 2009 1 semester (1 student)
Duties: Full responsibility for designing, teaching, advising, and mentoring an advanced student in the field of work and organizations

_Sociological Methods (SO201)_
- 2007 1 semester (35 students)
Duties: Full responsibility for designing and teaching the course

_The American Family (SO205)_
- 2007 1 summer session (15 students)
Duties: Full responsibility for designing and teaching the course

_Principles in Sociology (SO100)_
- 2007/2006/2005 4 semesters (60 students per semester)
Duties: Assist instructors with test design, grading, grade management, advising students, holding review sessions, and facilitating class discussions

_Writing Fellow, Boston University_

_Time, Work, and Life: A Research Seminar (WR150)_
- 2009/2008 2 semesters (20 students per semester)
Duties: Full responsibility for designing and teaching the research-intensive course

_Time, Work, and Life: A Writing Seminar (WR100)_
- 2008/2007 2 semesters (25 students per semester)
Duties: Full responsibility for designing and teaching the writing-intensive course

_Adjunct Instructor, Tufts University_

_Seminar in Mass Media Studies: Film & Society (SOC185)_
- 2011/2009 2 semesters (15 students per semester)
Duties: Full responsibility for designing and teaching the course
Media & Society (SOC040)
2011/2010 – 2 semesters (50-100 students per semester)
Duties: Assist co-instructor with teaching, test design, grading, grade management, advising students, holding review sessions, and facilitating class discussions

Adjunct Instructor, University of Massachusetts Boston

Methods of Sociological & Criminological Research (SOCIOL/CRMJUS 351L)
2014/2013/2012/2011/2010 – 10 semesters (30 students per semester)
2014/2013/2012/2011/2010 – 5 summer sessions (25 students per session)
Duties: Full responsibility for designing and teaching the course

Introduction to Sociology (SOCIOL 101)
2012 – 1 semester (35 students)
2014/2013 – 2 summer sessions (35 students per session)
Duties: Full responsibility for designing and teaching the course

Sociology of Media & Mass Communications (SOCIOL300)
2014/2013/2012/2011/2010 – 5 semesters (35 students per semester)
2014 – 1 summer session (30 students per session)
Duties: Full responsibility for designing and teaching the course

Independent Study: Honors Practicum
2011 – 1 semester (1 student)
Duties: Full responsibility for designing, teaching, advising, and mentoring an advanced student in the field of media research

Sociology of Popular Culture (SOCIOL120G)
2010/2009 – 3 semesters (25 students per semester)
Duties: Full responsibility for designing and teaching the writing-intensive course

RESEARCH EXPERIENCE

2009 Research Assistant, Massachusetts Institute of Technology – Cambridge, Massachusetts
Conducted research for M. Diane Burton on the "for-profit logics" affecting the structure and functioning of non-profit organizations

2007 Research Assistant, Boston University – Boston, Massachusetts
Conducted research for Emily Barman on the National Taxonomy of Exempt Entities (NTEE) codes for her paper, "Classificatory Struggles in the Nonprofit Sector" and project Doing Good: Accounting for Measurement in the Nonprofit Sector funded through her American Sociological Association/National Science Foundation Fund for the Advancement of the Discipline Research Grant

2006  
Research Assistant, Massachusetts Institute of Technology ₋ Cambridge, Massachusetts

Conducted ethnographic research on the construction of safety in research laboratories under the direction of Susan S. Silbey for the project "What Is The Place of Safety In Science? ₋ An Experiment in Group Ethnography" (National Science Foundation Grant #0535780)

2003  
Undergraduate Research Assistant, University of Maryland ₋ College Park, Maryland

Conducted research for John P. Robinson on the public opinion of and the social impact of the Internet and web-use time for his The Social, Political, and Cultural Impact of New Technologies: Insights from Surveys on Contemporary Patterns of Internet Use (National Science Foundation Grant #9819907) and Understanding the Social Impact of the Internet: A Multifaceted, Multidisciplinary Approach (National Science Foundation Grant #0086143) projects

PROFESSIONAL AFFILIATIONS AND SERVICE

Discipline

2010 ₋ Member, American Association of University Women
2005 ₋ Member, Eastern Sociological Society
2005 ₋ Member, American Sociological Association

Section Membership:  
Economic Sociology
Teaching & Learning
Community & Urban Sociology
Organizations, Occupations, and Work

Department

2007 ₋ 2014  Graduate Student Mentor
2005 ₋ 2014  Member, Sociology Graduate Student Committee
REFERENCES

Emily Barman, Ph.D.
Associate Professor of Sociology, Boston University, eabarman@bu.edu

Alya Guseva, Ph.D.
Associate Professor of Sociology, Boston University, aguseva@bu.edu

Japonica Brown-Saracino, Ph.D.
Professor of Sociology, Boston University, japonica@bu.edu

John Stone, Ph.D.
Professor of Sociology, Boston University, jstone2@bu.edu

Russell Schutt, Ph.D.
Professor of Sociology, University of Massachusetts Boston, russell.schutt@umb.edu